

A large, multi-decked cruise ship is shown from a side-on perspective, sailing on a calm blue sea. The ship is white with multiple decks, many windows, and orange lifeboats. The background features a sunset sky with orange and yellow clouds. In the top right corner, there is a white circular graphic containing the word "FIRST." in a bold, sans-serif font.

FIRST.

Searching for a Cruise Holiday Online

Which websites are maximising their market share?



Calculating share of search

- Rankings Based Reach (RBR)* provides a simple way to compare a website's search engine rankings with its competitors.
- RBR is an estimate of the percentage of available search traffic a website will receive for a set of phrases – this gives the sites share of search or reach.
- It is weighted based on the popularity of each search phrase and the relative click through rate (CTR) of each ranking position.

*Source: Rankings Based Reach (RBR) is a methodology developed by FIRST



Selected sites

The following New Zealand cruise holiday sites were selected for Ranking Based Reach (RBR) organic search performance analysis.

Sites
cruiseabout.co.nz
cruiseholidays.co.nz
cruisesalefinder.co.nz
finetravel.co.nz
flightcentre.co.nz
harveyworld.co.nz
houseoftravel.co.nz
letscruise.co.nz
pocruises.co.nz
unitedtravel.co.nz

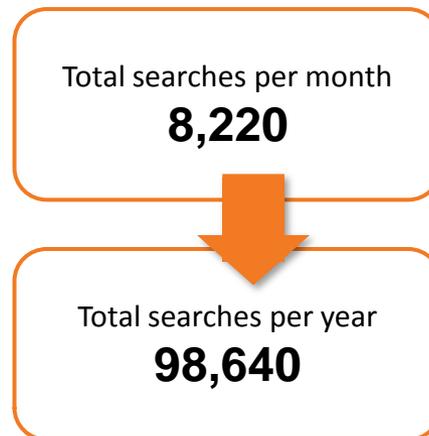


What are people searching for?

In order to investigate which websites are leading in search FIRST researched frequently used cruise holiday -related phrases.

Search Phrase	Local searches per month
cruise holidays	3600
cruises from auckland	1000
oceania cruises	720
mediterranean cruises	590
caribbean cruises	480
cruise finder	390
disney cruise	390

Search Phrase	Local searches per month
cruises nz	320
greek island cruises	210
new zealand cruises	140
costa cruises	140
south pacific cruises	140
alaska cruise	70
river cruise	30





Google: Search engine results page 1

What the consumer sees: The top of the Google search results page for a search on 'cruise holiday'



Cruise Sale Finder and Cruiseabout are ranking in the top two positions for the paid search results for the term 'cruise holiday'.

In the organic search results, majority of the analysed companies rank on Google's first page. Despite ranking for organic listings, Cruiseabout is still investing heavily in paid advertising which allows it to dominate the first page with multiple listings.

Cruises At Sale Prices - CruiseSaleFinder.co.nz
www.cruisesalefinder.co.nz/ -
Hunt Down The Best Cruise Offers On P&O, Princess, Cunard & Much More

Cruise Holidays Online - cruiseabout.co.nz
www.cruiseabout.co.nz/cruise-holidays -
Cruise Holidays On Sale Today. Search & Enquire Online Now.
Last Minute Cruises - Cruise Specials - Cheap Cruises - Enquire Online Now
16, 177 Parnell Rd, Parnell

Cruise Holiday Deals - For The Best Cruise Deals & Advice
www.ourcruise.co.nz/cruise-deals - 0800 400 498
Contact Our Experts @ Our Cruise.
Great Holiday Packages - Travel With A Difference - Experienced Travel Agents
14 Burleigh Street, Auckland

Cruise Holidays (NZ) Ltd - Ship Details, Specials ...
www.cruiseholidays.co.nz/ -
Welcome to Cruise Holidays, where our experience of over 20 years in the cruise industry has given us the knowledge to help you choose the right cruise for you ...
Cruise FAQs - Contact Us - Login - Register

Find a Cruise Holiday - P&O Cruises
www.pocruises.com.au/ Home - Find a Cruise -
Choose where you want to go and let your holiday of a lifetime begin with the best cruise deals around.

Cruise holidays - guide to cruising - Flight Centre NZ
www.flightcentre.co.nz/cruise/cruise-holidays -
Nothing beats cruising for incredible holiday savings. You'll visit multiple destinations and so much is included, from dining and entertainment, to sport, fitness ...

Cruise Holidays & Vacation Packages - Harvey World
harveyworld.co.nz/Cruise -
At Harvey World Travel, we are NZ's cruise specialists. Find the latest cruise holiday deals to the South Pacific, Asia, Europe, Alaska & more with Harvey World ...

Cheap Cruises Worldwide, South Pacific Cruise Deals ...
www.letsruise.co.nz/ -
In addition to New Zealand Cruises, we arrange South Pacific Cruises for perfect Cruise Holidays. We are known for Cheap Cruises & offering best cruise deals.

P&O Cruises: Cruise Holiday Packages, Holiday Deals from ...
www.pocruises.co.nz/ -
Large ship sailings around Australia and in the South Pacific, departing from Sydney and Brisbane.

Cruise Deals & Holidays | Cheap Cruises - United Travel ...
unitedtravel.co.nz/Cruise -
Low cost cruise deals to Australia, South Pacific, Asia, Europe, Alaska & more. Find the latest & cheapest cruises with United Travel NZ.

Cruises | Search Over 5000 Cruise Deals With Cruiseabout
www.cruiseabout.co.nz/ -
Find the latest and best cruise deals for 2014, 2015 and 2016 with Cruiseabout. We guarantee the best cruise deals on any quote - or you'll sail for FREE.

Cheap Cruise Holidays & Deals 2015 / 2016 | Cruise ...
www.thomascook.com/cruise/ -
Book great value cruise holidays with Cruise Thomas Cook. Get the luxury experience with cheap cruises in 2015 / 2016 to worldWide destinations all within ...

Silversea® Luxury Cruises
www.silversea.com/Luxury-Cruises -
Voted Best Luxury Cruise Company by Travel + Leisure for seven years!

Hawaii Cruise Holidays
www.gohawaii.com/nz/Cruises -
Cruise Around Hawaii in Style
Learn More About Hawaiian Cruises.

Great cruises 70% Off
www.dreamlines.com.au/Offers -
P&O, Princess and Royal Caribbean.
Get your incredible deal today!

Search 2015 Cruise Deals
www.cruiseaway.com.au/CruiseDeals -
Get the best Cruise Deals online!
Out of 88 selected Cruise Lines.

Cruise Holidays
unitedtraveltakapuna.gophercp.co.nz/ -
Offering Major Cruise Line Packages
Enquire Now For Your Bookings!

Cruise Holiday
www.secretescapes.com/Holidays -
4.4 ★★★★★ advertiser rating
Luxury Cruise Holidays. Save Up To 70% Exclusive Deals. Join Today!

Royal Caribbean Cruises
royalcaribbean.cruiselines.com/ -
Last-minute & early-bird savings with America's cruise discounter.

World cruises
www.finetravel.co.nz/Cruises -
Explore & book your next cruise.
Find your next cruise holiday.

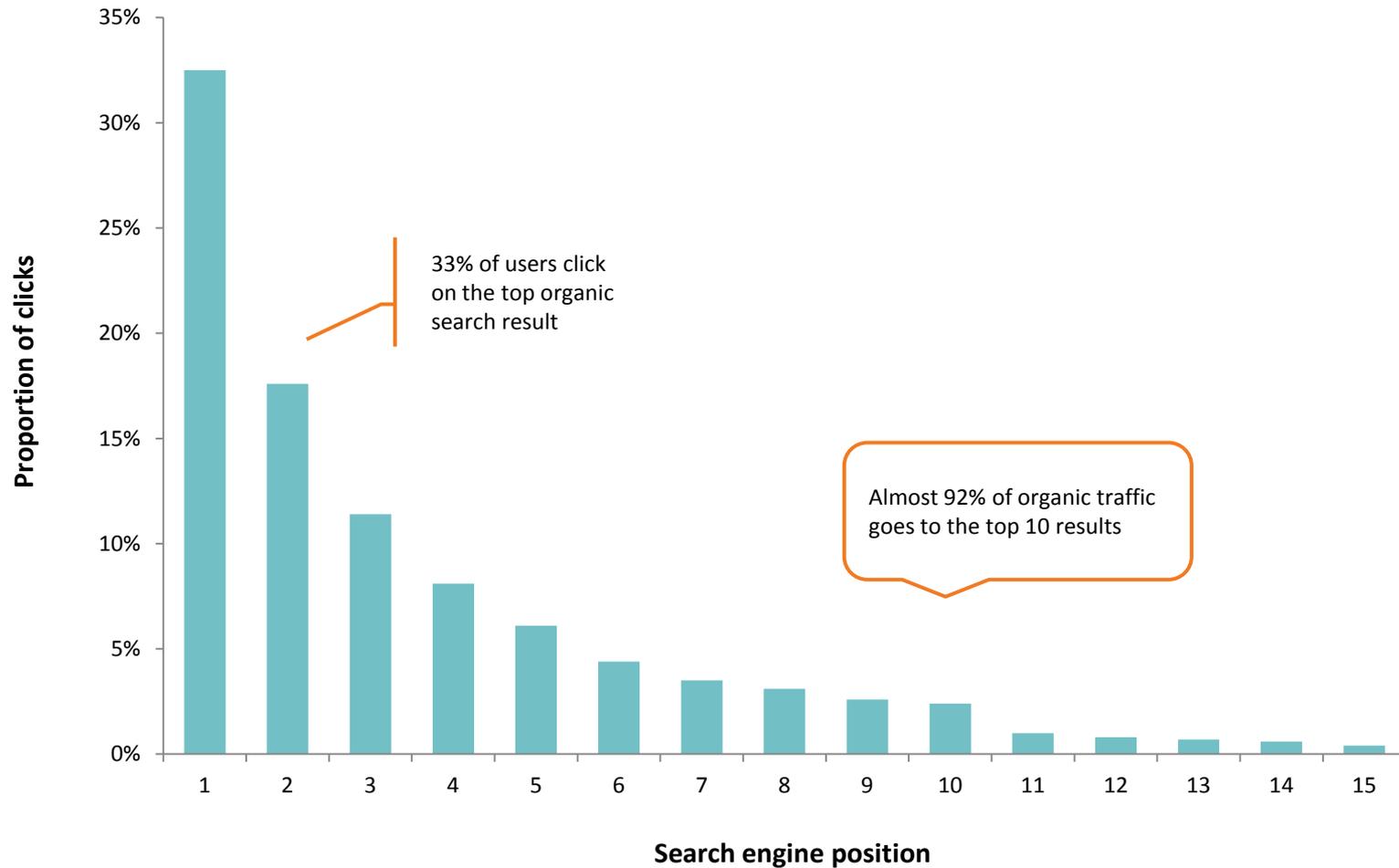
Paid search results

Fine Travel is also present in the paid search results ranking in the 11th position. In total there are 11 companies ranked for paid search. That represents the maximum number of paid search results for the first page. Given that, the cruise holiday market is highly competitive.

Organic search results



The importance of top rankings

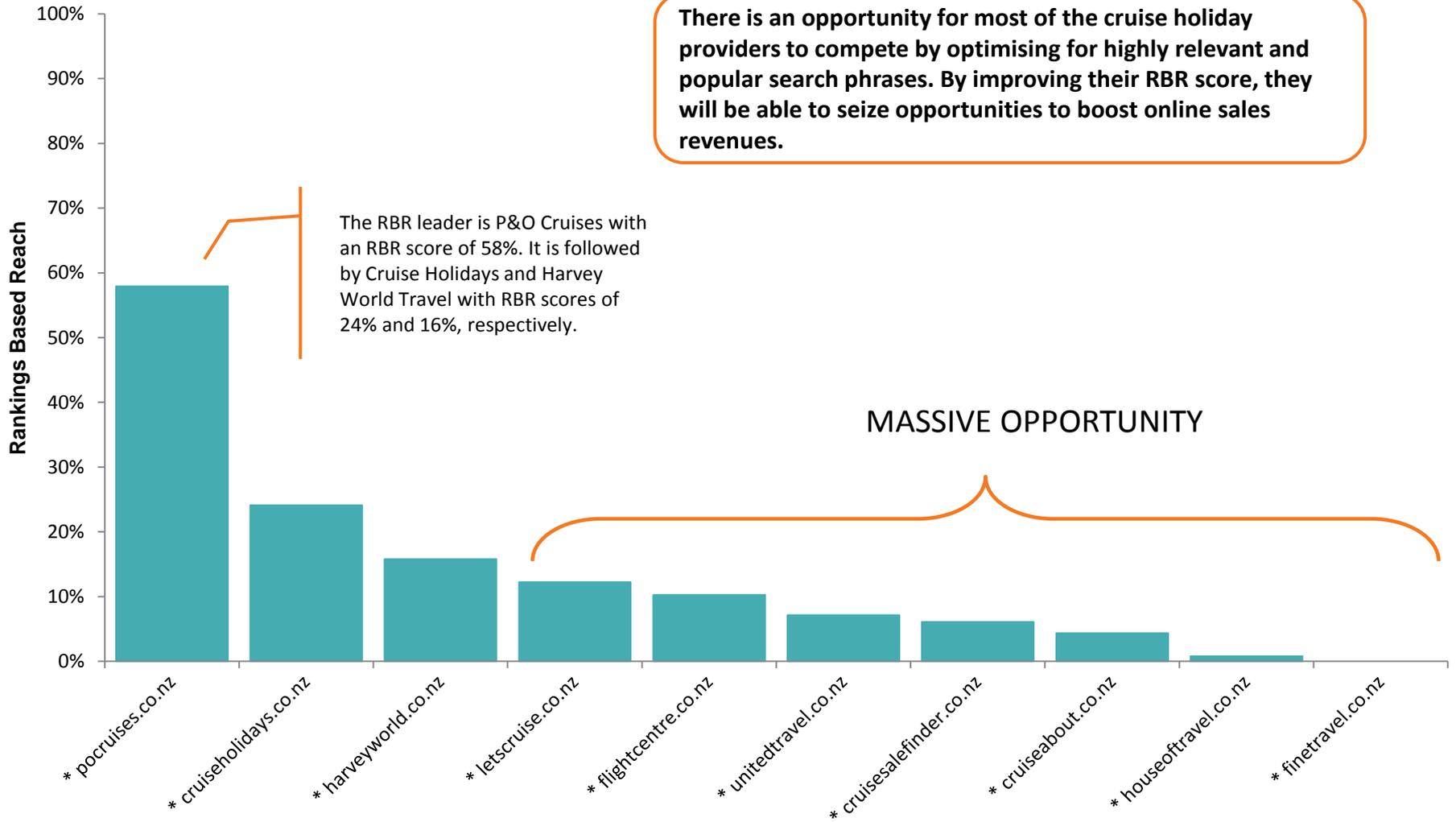


Source: Chitika, 2013 (Organic Search)



Rankings Based Reach: Natural Search

There is an opportunity for most of the cruise holiday providers to compete by optimising for highly relevant and popular search phrases. By improving their RBR score, they will be able to seize opportunities to boost online sales revenues.



The RBR leader is P&O Cruises with an RBR score of 58%. It is followed by Cruise Holidays and Harvey World Travel with RBR scores of 24% and 16%, respectively.

MASSIVE OPPORTUNITY

* includes all websites under the relevant domain name (e.g. including www.)

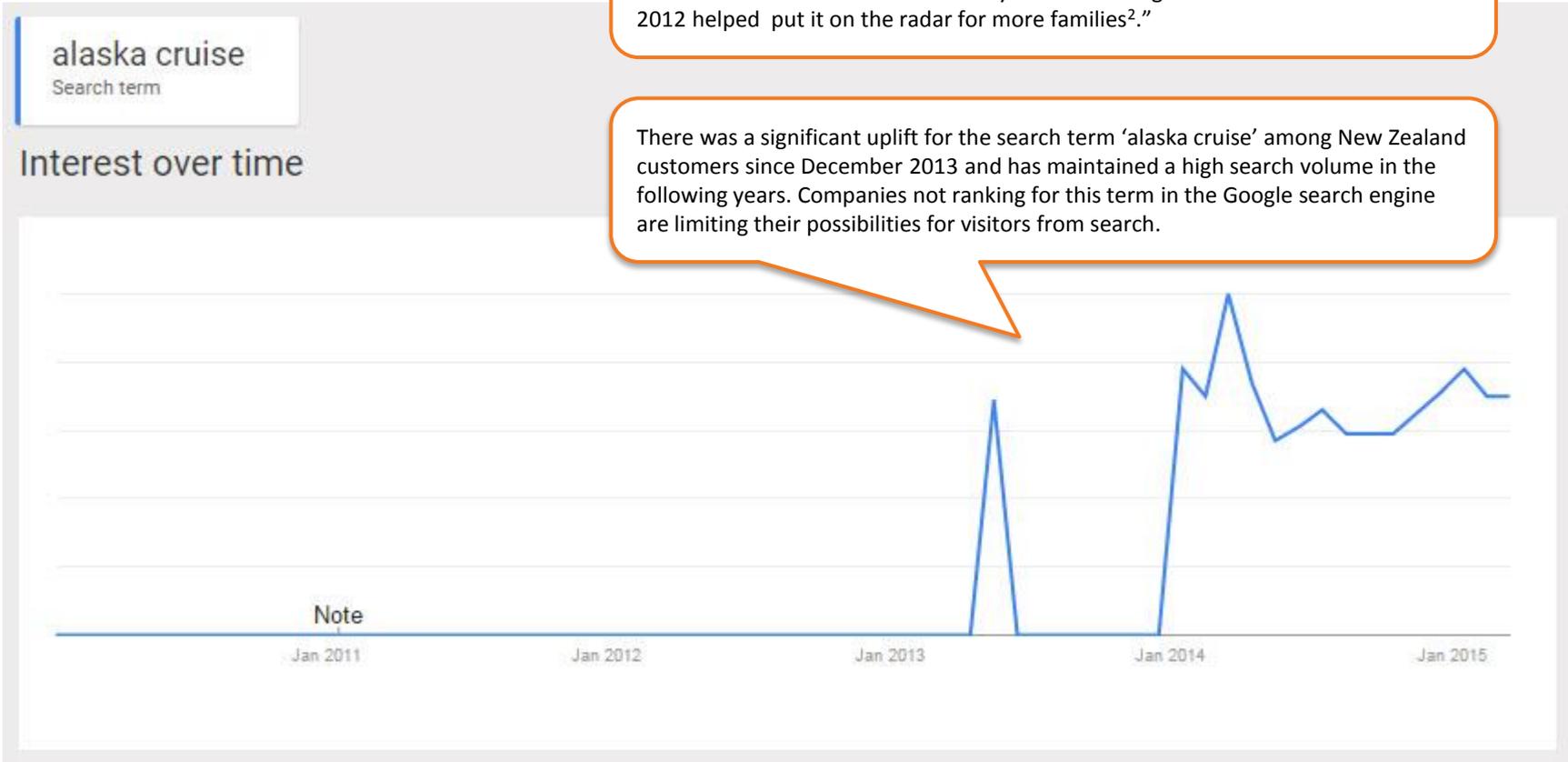
Source of ranking data: Google New Zealand, www.google.co.nz, Apr 2015

Search trends

The chart below illustrates interest in key search term ‘alaska cruise’ in New Zealand over the last 5 years in the travel specific category.

“Alaska accounts for 4.5% of all global itineraries in terms of cruise destinations¹.
 “Higher airfares to Europe since 2012 had more people looking at an Alaskan cruise as an alternative vacation. The Disney Wonder sailing to Alaska from Seattle in 2012 helped put it on the radar for more families².”

There was a significant uplift for the search term ‘alaska cruise’ among New Zealand customers since December 2013 and has maintained a high search volume in the following years. Companies not ranking for this term in the Google search engine are limiting their possibilities for visitors from search.



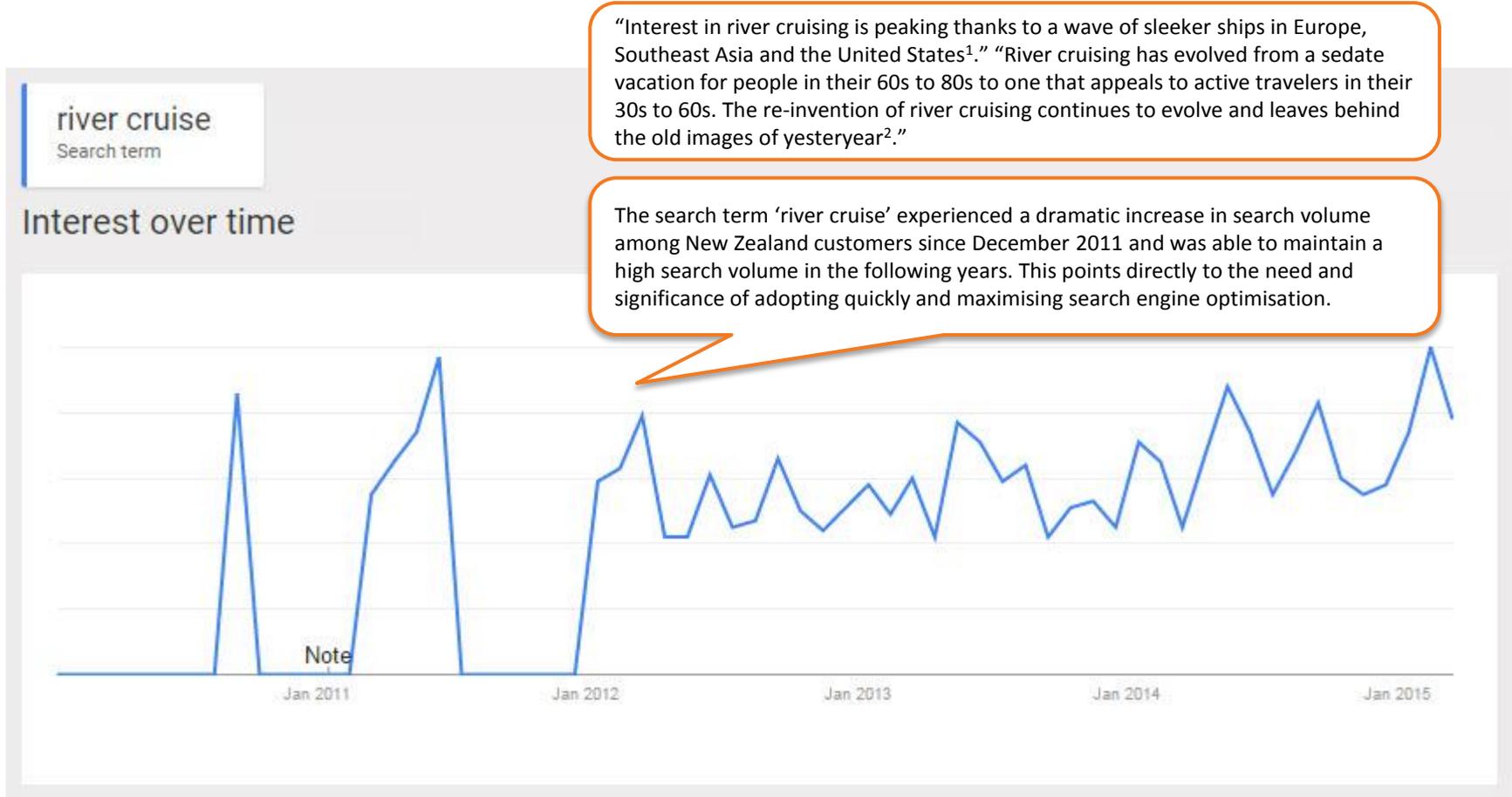
Graph source: Relative total keyword performance on a normalised scale of 1 to 100, Google Trends, New Zealand, Apr 2015

¹Source: The state of the cruise industry in 2014, Cruising.org, Jan 2014

²Source: Alaska, river cruising top 2012 cruise trends, Gainesville.com, Apr 2012

Search trends

The chart below illustrates interest in key search term 'river cruise' in New Zealand over the last 5 years in the travel specific category.



Graph source: Relative total keyword performance on a normalised scale of 1 to 100, Google Trends, New Zealand, Apr 2015

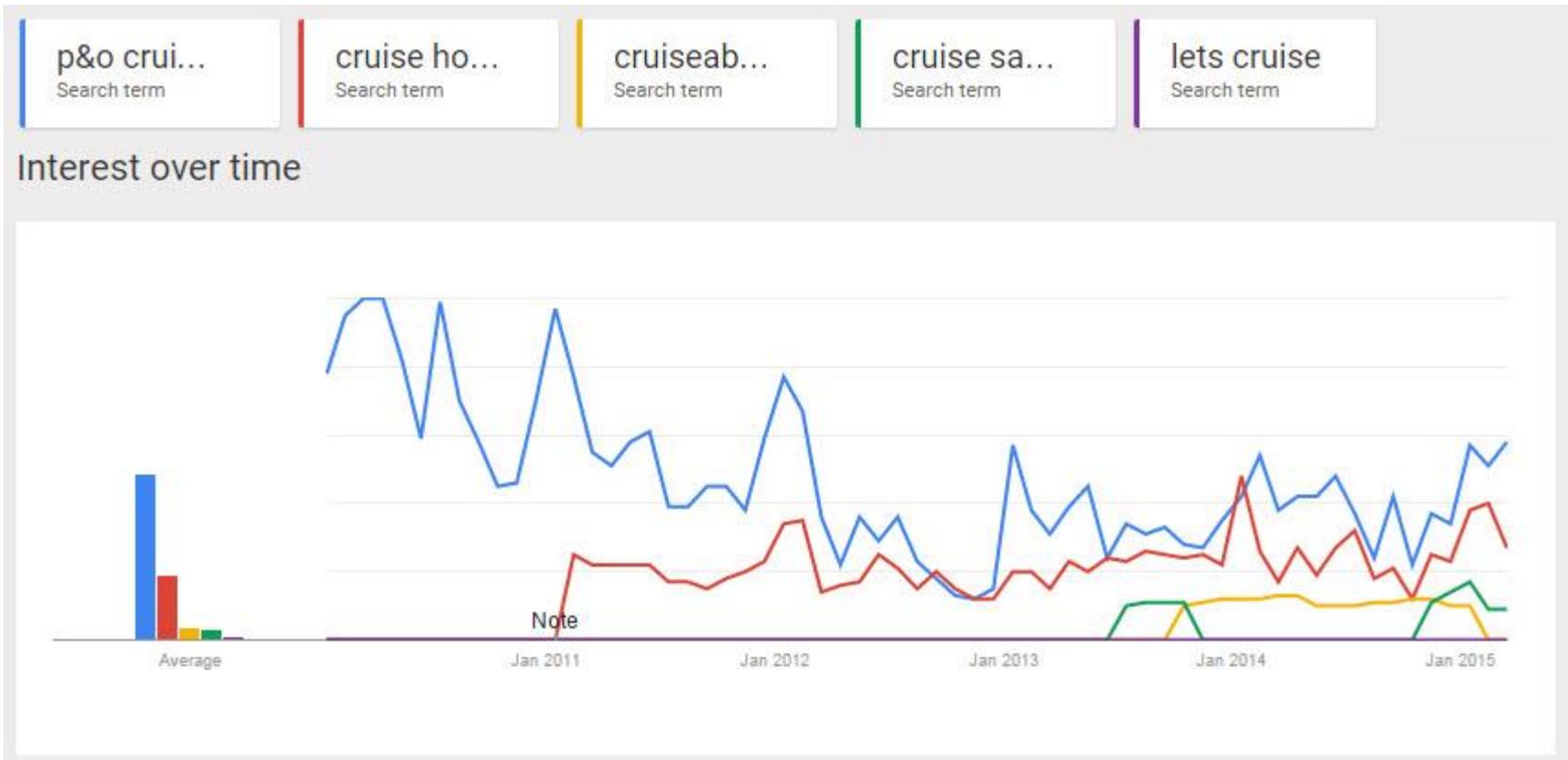
¹Source: Cruise Trends for 2015, Travel and Leisure, Dec 2014

²Source: Top river cruise trends for 2014, Travel Agent Central, Jan 2014

Brand search trends

The chart illustrates the brand search terms for cruise holiday providers in the cruises & charters specific category. Although P&O Cruises is leading in terms of online brand search, it has experienced a downward trend prior to 2012 and has remained relatively stagnant the following years. It is closely followed by Cruise Holidays. With nearly similar search volumes, Cruise Sale Finder, Cruiseabout and Lets Cruise are lagging behind its competitors.

To combat being left behind, runner-up cruise holiday providers need to drive consumer brand recognition via search, display, social and email remarketing campaigns.

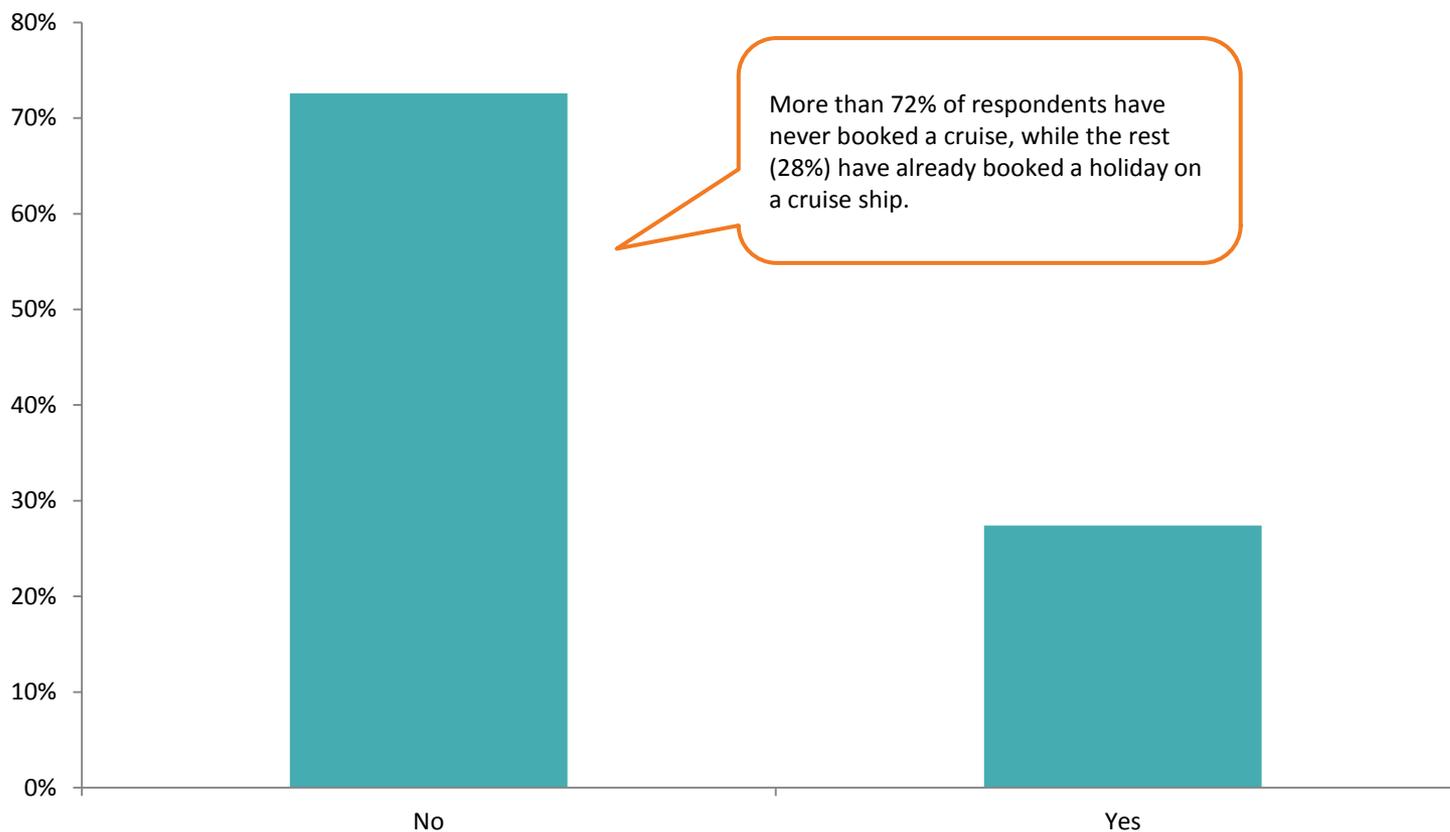


Source: Relative total keyword performance on a normalised scale 1 to 100, Google Trends, New Zealand, Apr 2015



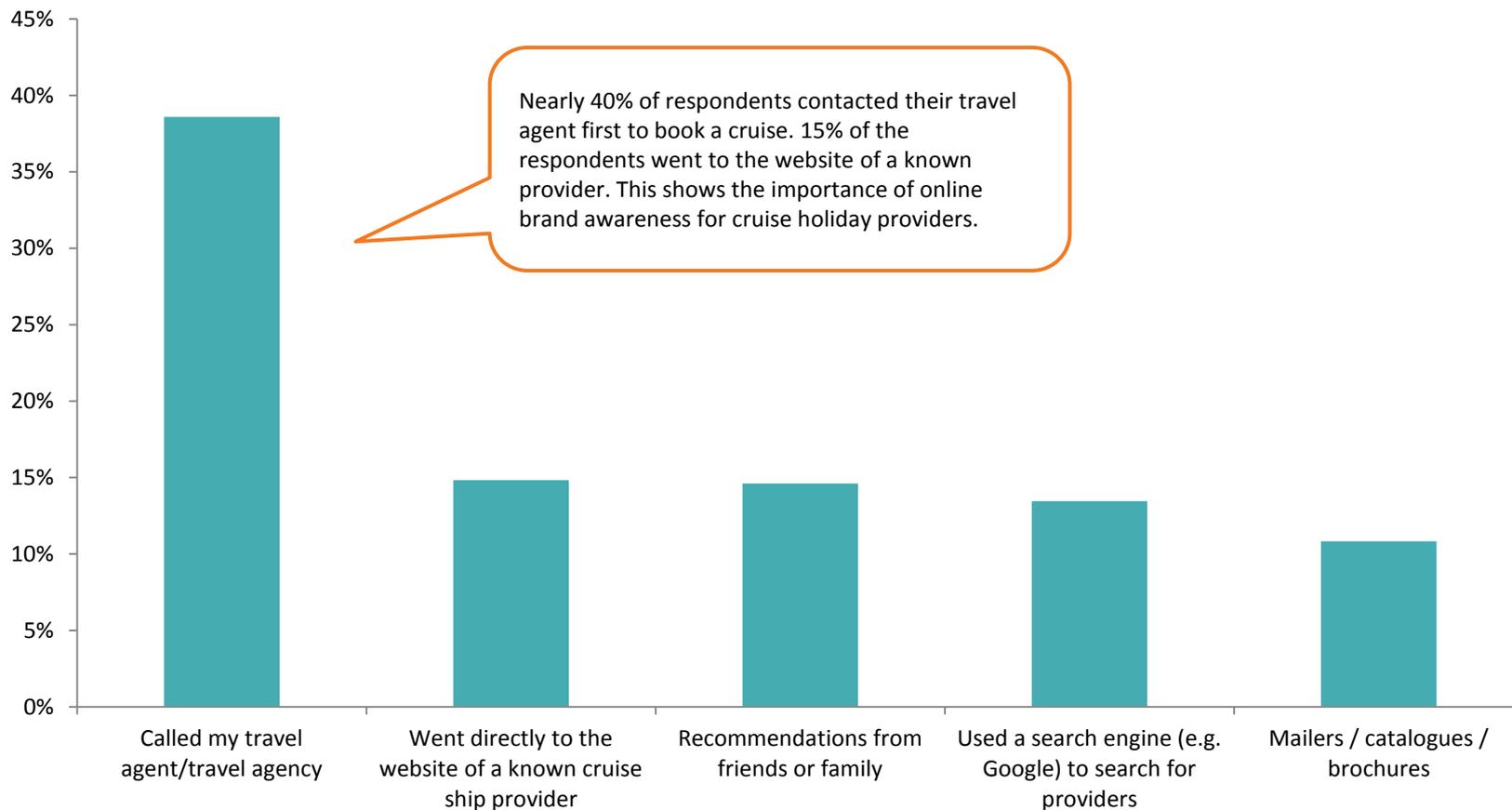
Consumer Research: 7 out of 10 have not booked a cruise holiday

Question 1: Have you ever booked a holiday on a cruise ship?



Consumer Research: Finding information

Question 2: Where did you go first to book a cruise?



This representative survey was carried out by 3Di Research on the Great Sites platform, Oct 2014 (n=3,436).

Consumer Research: Preferred destinations

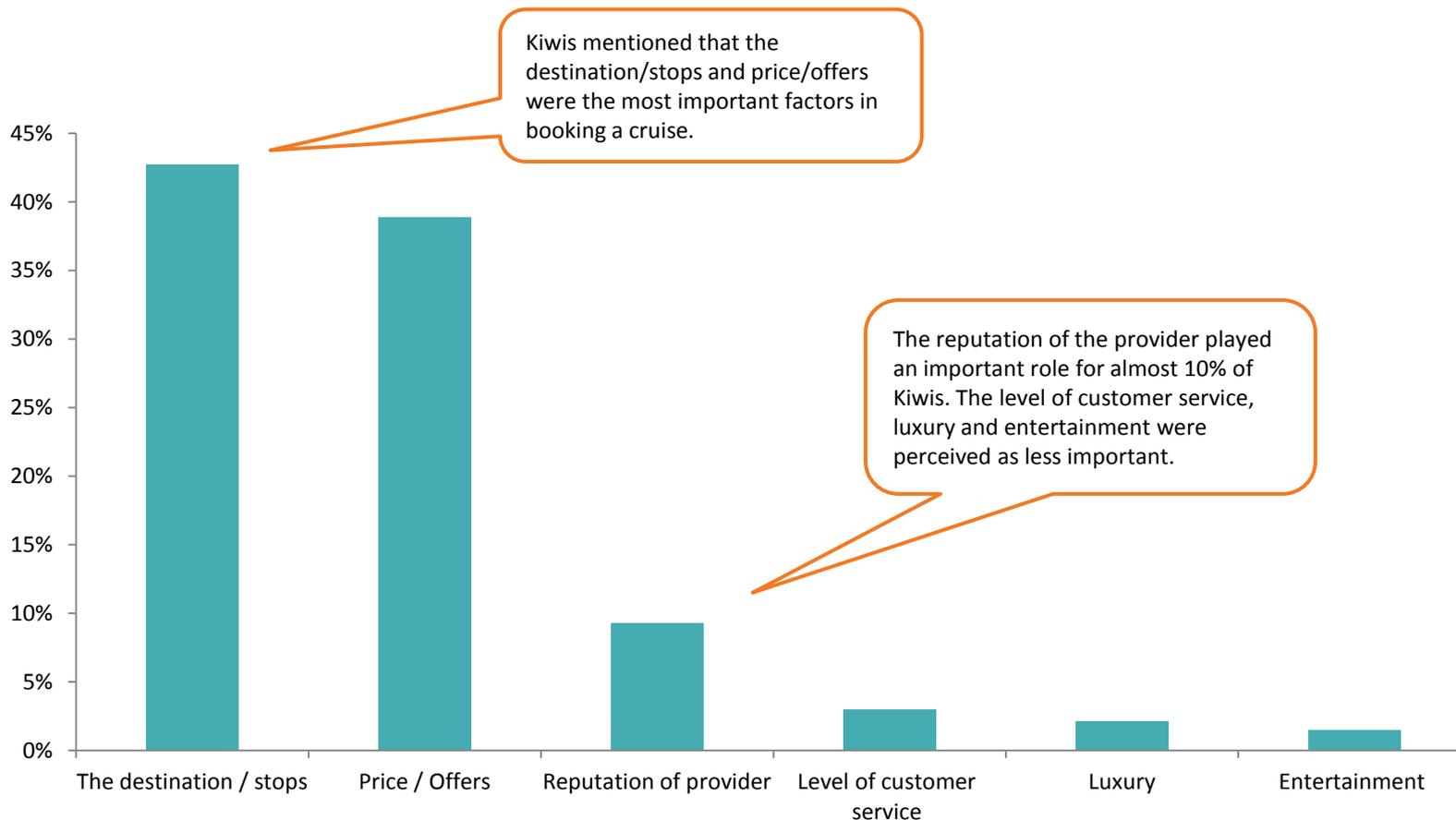
Question 3: What was the destination of your (last) cruise?



This representative survey was carried out by 3Di Research on the Great Sites platform, Oct 2014 (n=3,436).

Consumer Research: Important factor when booking a cruise

Question 4: What is most important for you when booking a cruise?



This representative survey was carried out by 3Di Research on the Great Sites platform, Oct 2014 (n=3,436).



Cruise Holiday– FIRST Insights



- Currently, P&O Cruises stands out in the search landscape, capturing a big proportion of the demand thanks to prominent organic search presence.
- Our survey revealed that Kiwis consider destination/stops and price/offers as the most important factors in booking a cruise. This points to the importance of displaying cruise prices, deals and other product offers visibly and strategically on the websites of cruise holiday providers.
- “New Zealanders are taking cruise holidays in record numbers with the rate of increase higher than any of the main passengers markets around the world. The cruise industry attributes its rising popularity to greater awareness of cruising as the New Zealand market matures and more ships call here [New Zealand]¹.” Given this trend, cruise holiday providers not ranking at prominent positions in search are missing out on potential sales and should invest in a robust digital strategy to be competitive online.
- Search results are broadly dispersed among a wide range of competitors. In the competitive and margin-driven cruise holiday market, providers need to optimise the most cost effective marketing channel - search.
- **A comprehensive and data-driven digital strategy that integrates both organic and paid search should be a key customer acquisition and revenue driver for cruise holiday providers.**

¹Source: Kiwis flock to cruise holidays in record numbers, The NZ Herald, Jul 2014



About FIRST.

FIRST is an award-winning team of smart Digital Marketers who have helped over 300 companies across 100 industries achieve success online. We help our clients to grow online sales, revenue and improve their ROI.

Our expertise in digital marketing has been built on over 15 years experience in digital strategy, analytics, conversion, search marketing and digital campaigns.

Get in touch to find out more...



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