



## Cruise Competitive Benchmark Study

Updated: October 15, 2018



# CRUISE COMPETITIVE REPORT

Over the past years, Key Lime Interactive (KLI) has made a **significant commitment** to improving the availability of meaningful consumer insights for a variety of industries.

In these annual benchmark industry reports, KLI uses a multi-faceted research approach combining: quantitative, qualitative, and behavioral data. **Hundreds of participants** complete a series of common tasks on each cruise line website. **Statistical analysis** of this data is employed to rank sites and uncover the **top drivers of loyalty and site satisfaction**.

In our 2018 Competitive Benchmark Report on Cruise, we will perform a survey of **2,800 people on Mobile and Desktop**.

Testing 8 Sites and 8 mobile sites:



# KEY LIME METHODOLOGY

- **Between subjects design:** Participants are *randomly* assigned to review one site (web or mobile) for 25-30 minutes.
- **Task-based research:** Participants are asked to complete 4 tasks: (1) First Impression & Value Proposition; (2) Find a Cruise; (3) Research Amenities, Activities & Excursions; and (4) Book Cruise.
- **Advanced Statistical Analysis:** Our researchers then analyze the quantitative data using multivariate methodology based on high-dimensional regression blended with CAR scores. Rankings will be established for each of the drivers. Data is analyzed to see if there are any significant differences. At your request, we can analyze the data to see if there are at differences between those that have cruised with your brand vs. others.
- **Clickstream analysis:** Our researchers will analyze clickstream to see participants first-click to start a task and what paths they take for success/failure.
- **Comment analysis:** Open-ended comments will be used to further support quantitative data

## BUSINESS IMPACT:

“...This methodology provides the details we need

*in order to focus our development plans in the coming year,”*

—Rob Casas, Vice President of eCommerce at Norwegian Cruise Line.



# TASKS:

## 1. First Impression & Value Proposition:

"Please spend a minute or two looking at the site's home page to form an impression of the site and what it offers. Then, take a few minutes to explore the site briefly to learn about what makes [BRAND] different from its competitors."

## 2. Find a Cruise

"Suppose you would like to take a cruise vacation to [DESTINATION] in [MONTH, YEAR]. Spend some time on this site looking for a cruise that would best meets your needs in terms of who you typically travel with, price, length, value, or any other criteria that are important to you."

## 3. Research Amenities, Activities & Excursions

"Now spend some time on this site researching activities, entertainment, dining options, shore excursions, and any other aspects of a cruise vacation that are important to you."

## 4. Book Cruise

"Suppose you were interested in booking the cruise you found today, proceed as far as possible through the process of booking it on the site without actually completing the transaction. Do not enter your payment information or you will really be charged."



50% **Male**

50% **Female**

**Age:** 30+

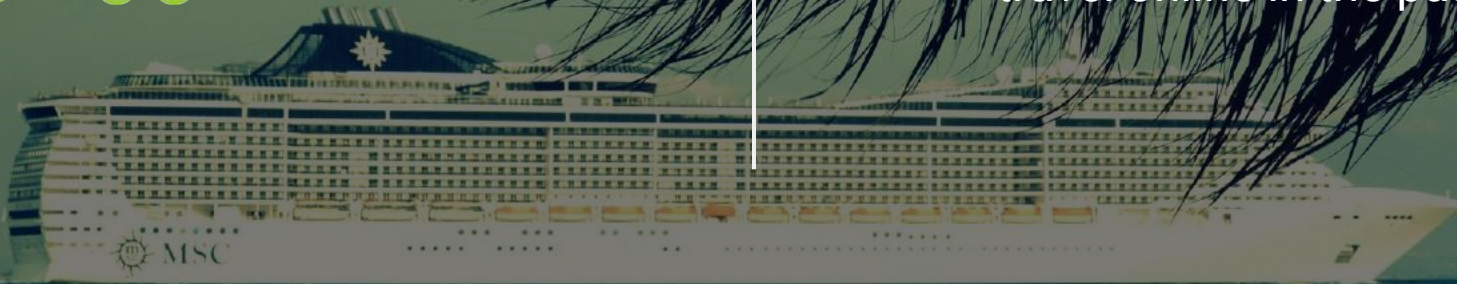
**HHI:** \$50K +

Live in USA

50% **experienced cruisers** (have previously taken 1+ cruises)

50% **inexperienced first-time cruisers**

**All** have researched or booked travel online in the past



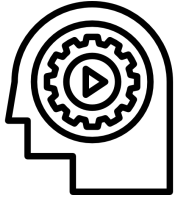
\*Note: Panel is closely monitored so that there are no significant differences in gender, age, income distribution across sites

# FIELDING APPROACH

KLI's uses a **unmoderated task-based** user research approach to gather responses over the fielding period. High level points on this approach are as follows:

- Hundreds of users participate in a study
- Passively recruited, in their natural context, from geographically widespread locations
- Participants answer questions and are screened based on our pre-defined criteria
- No human moderation needed; easy to deploy
- Browser bar connects users with secure servers
- Ability to collect behavioral, qualitative and quantitative data with this research approach
- Aggregate trends in data and draw conclusions

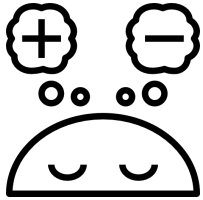
QUESTION ID	QUESTION TEXT	SCORE
1	What, if anything, was helpful while trying to book a cruise on this site?	0.000000
2	all, looking, reviews, others, search, ESSBY, connectivity, great, home, information, navigation, no, nothing, options, process, reviews, search, site, stop	0.000000
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100	nothing	0.000000



## Behavioral Loyalty Metrics

- Likelihood to Leave: How likely are users to leave/abandon the site in real-life?
- Likelihood to Return: How likely are users to visit the site in the future?
- Likelihood to Purchase: How likely are users to book [BRAND] cruise in the future?
- NPS: How likely are users to recommend [BRAND] to a friend or family member?



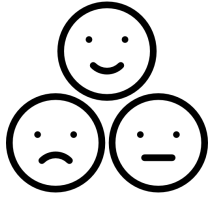


## Attitudinal Loyalty Metrics

- Brand perception pre-to-post lift: Does the site experience change users perception of the brand? Difference between new and experienced cruisers?
- Brand attributes associated with company based on site experience:
  - How well do sites convey the brands' value prop?
  - Contemporary and Premium brand examples: Fun, Exciting, Good value, Laid back, and Relaxing







## Overall Site Satisfaction Metrics

- Ease of use: Ease of using the site
- Satisfaction: Satisfaction with the site while doing each task
- Needs are met: Users are able to find what they are looking for
- Quality: Satisfaction with overall quality of cruises and cruise line
- Selection: Satisfaction with selection of destinations and/or cruises available
- Value: Satisfaction with perceived value, special offers and promotions
- Information Reliability: Accuracy, depth, ease of finding and understanding
- Information Reliability: Accuracy, depth, ease of finding and understanding
- Site Performance: Satisfaction with site speed, few or no errors encountered

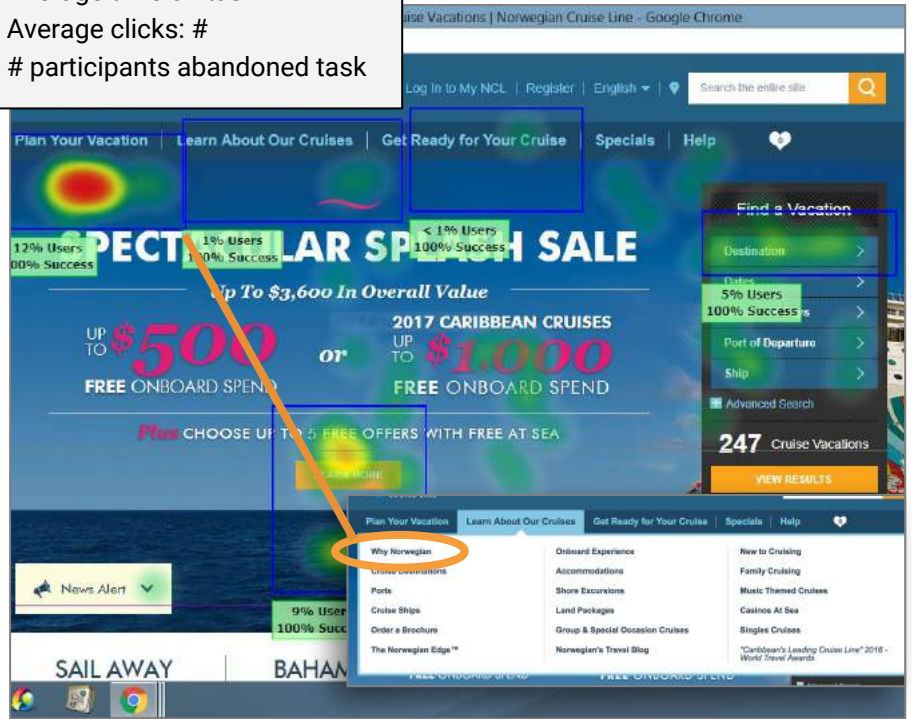


# ANALYSIS: BEHAVIORAL DATA

Key Lime's reports the following behavioral data:

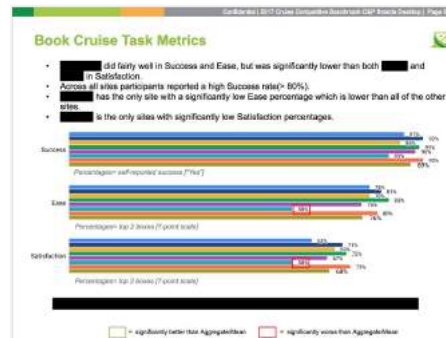
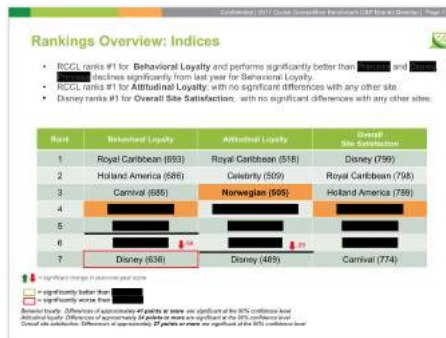
- ❖ Average time on task: #:#
- ❖ Average clicks: #
- ❖ # participants abandoned task

- Task success
- Average time on task
- First click analysis - capture a minimum of 50 first clicks for mobile and 75 first clicks on web as part of the data-set with the objective of acquiring ideally up to 100 participants' first clicks for mobile and ~134 for web during the first 10 days of fielding. On day 11, if we have met the minimum of 50 for mobile and 75 on desktop, we will switch to no-download for the final data collection so the study can finish fielding within 15-18 days.



- You'll receive two reports: one for web and one for mobile
- Both include
  - Screenshots
  - Ranking
  - Why 1st: Best in class sides with details
  - Compare best in class with your brand
  - Recommendations
  - Includes success, ease and satisfaction ratings
  - And more...

Each report has ~75+ pages of slides like the following:



<b>Description</b>	<b>~Start Date</b>	<b>~End Date</b>
Kick-off/ Fielding Prep and QA	November 20	November 21
Begin Fielding	November 26	
End Fielding	December 10	
Statistical Analysis	December 11	December 17
Quantitative/Qualitative Analysis and Reporting	December 18	January 4
Delivery	January 7	



THANK YOU!  
ANY QUESTIONS?

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