

18th June 2020



online marketing in tough times.

Paul Stephen CEO

the 4Ps.

Product

Price

Place

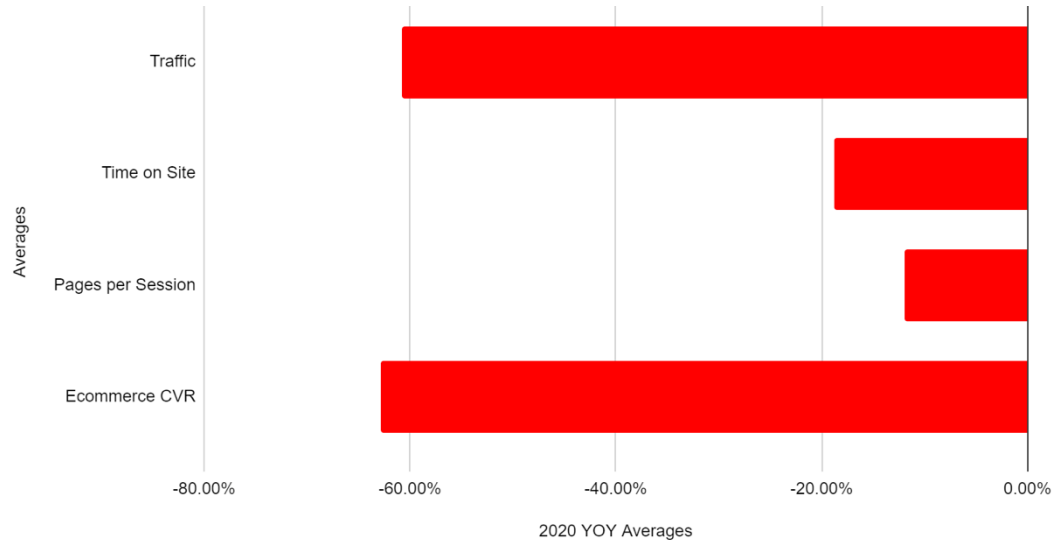
Promotion

context.





year-on-year downturn.

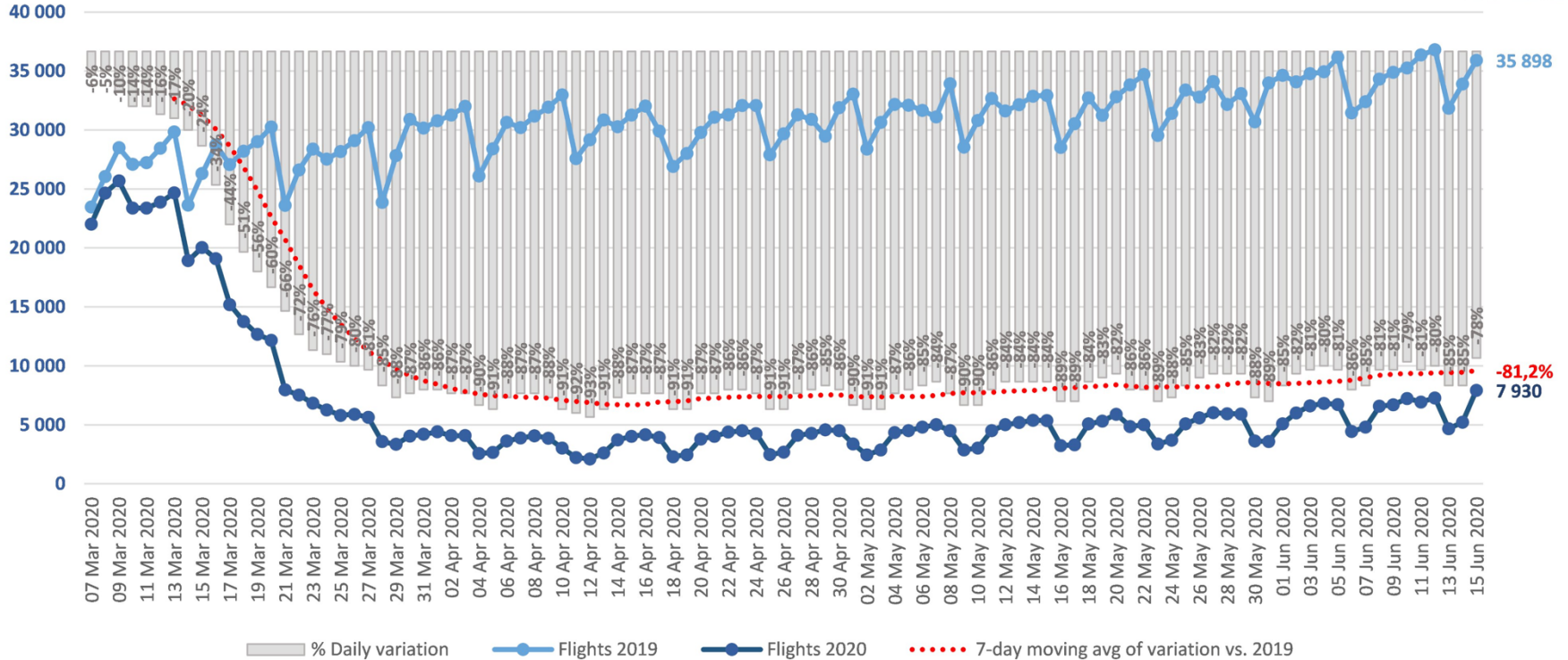


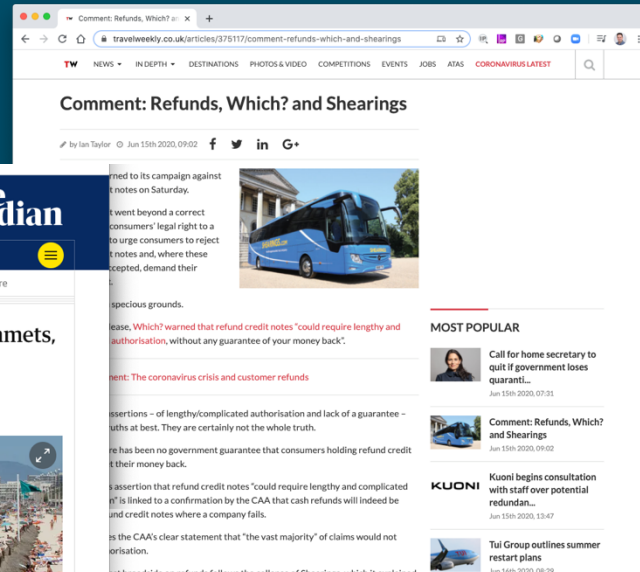
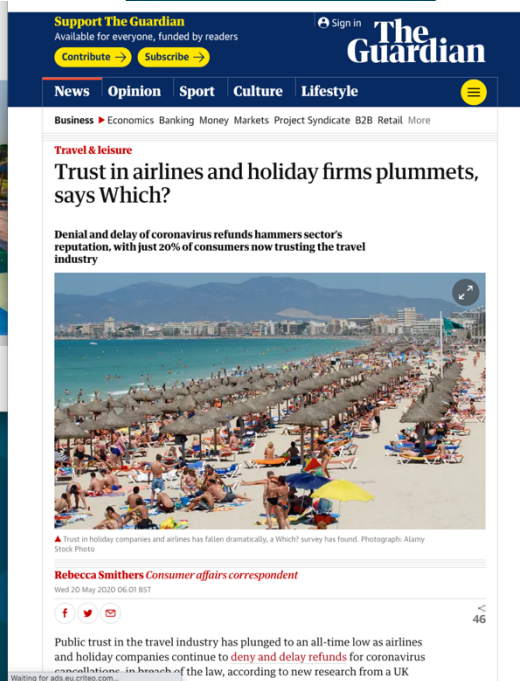
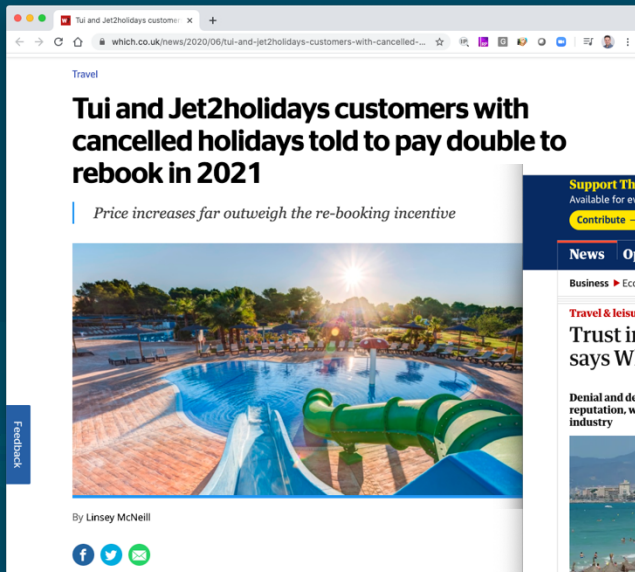
Jan – Jun '19 vs Jan – Jun '20

Source: Aggregate of GA for Tour Operators, Hotel Groups and Airlines

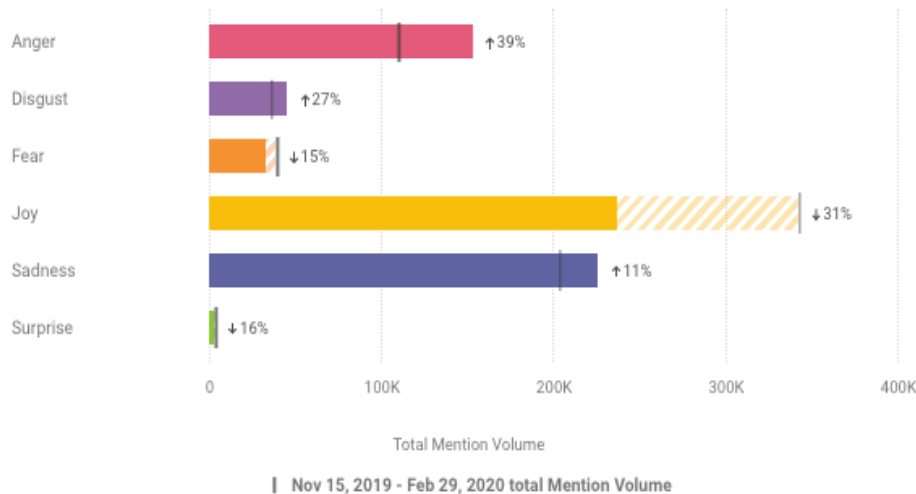
EUROCONTROL Network

Daily Variation (Flights) compared with equivalent days in 2019





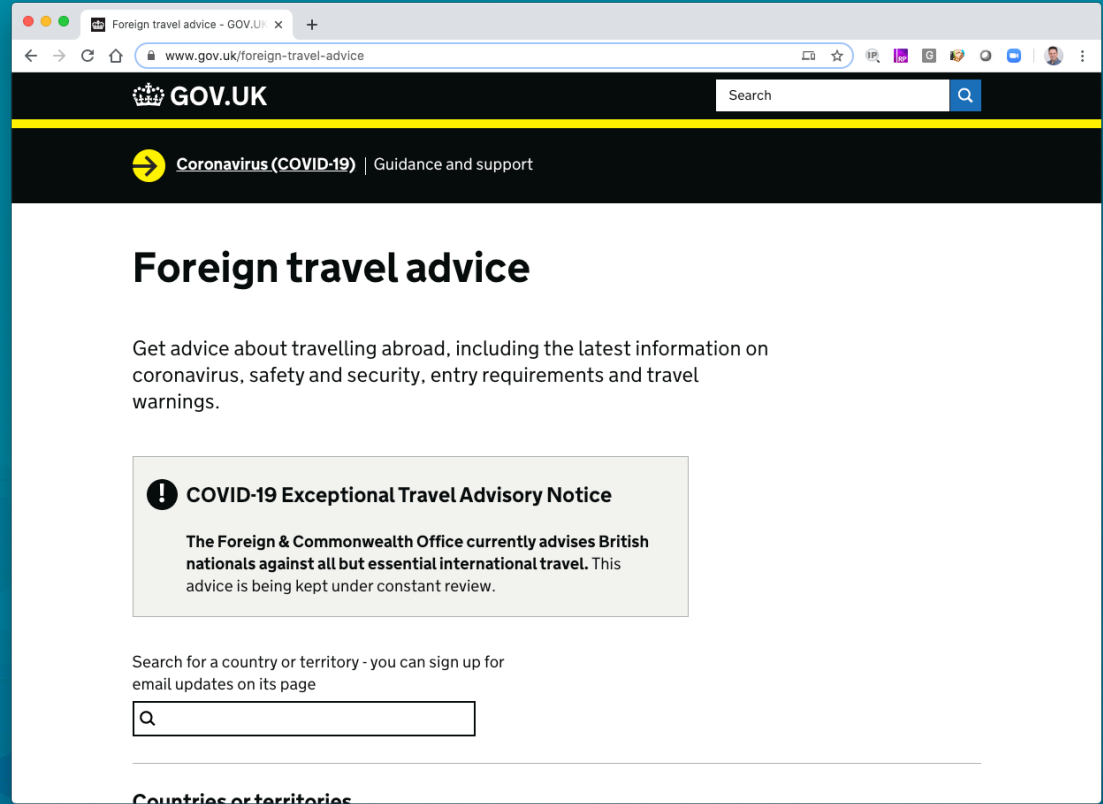
angry and negative



Negative posts are up 21%
and positive down 28%

Posts are not just negative,
they are Angry. Up 39% and
angry about cancellation
policies, covid and getting
refunds

FCO



The screenshot shows the GOV.UK website's 'Foreign travel advice' page. The browser's address bar shows the URL 'www.gov.uk/foreign-travel-advice'. The GOV.UK logo is at the top left, and a search bar is at the top right. Below the header, a navigation bar features a yellow arrow icon and the text 'Coronavirus (COVID-19) | Guidance and support'. The main heading is 'Foreign travel advice'. Below this, a paragraph states: 'Get advice about travelling abroad, including the latest information on coronavirus, safety and security, entry requirements and travel warnings.' A prominent grey box contains a warning icon and the text: 'COVID-19 Exceptional Travel Advisory Notice. The Foreign & Commonwealth Office currently advises British nationals against all but essential international travel. This advice is being kept under constant review.' Below the notice, there is a search prompt: 'Search for a country or territory - you can sign up for email updates on its page' followed by a search input field with a magnifying glass icon. At the bottom, the text 'Countries or territories' is partially visible.

Foreign travel advice - GOV.UK x

www.gov.uk/foreign-travel-advice

GOV.UK

Search

Coronavirus (COVID-19) | Guidance and support

Foreign travel advice

Get advice about travelling abroad, including the latest information on coronavirus, safety and security, entry requirements and travel warnings.

COVID-19 Exceptional Travel Advisory Notice

The Foreign & Commonwealth Office currently advises British nationals against all but essential international travel. This advice is being kept under constant review.

Search for a country or territory - you can sign up for email updates on its page

Q

Countries or territories

A3 scenario assumes demand recovery in 2022; more conservative A1 scenario estimates delayed recovery until 2023-24

Airline travel demand scenarios, Trillions RPKs¹

RPK view

A3

Virus contained; slow recovery



What you have to believe

- Rapid and effective control of the virus including minimal resurgence and no un-controlled spread beyond the first wave
- Effective government stimulus and interventions
- Governments leaning forward on lifting travel bans & restrictions
- Effective yield stimulation driving a demand ramp up similar to past crises
- Minor lasting changes in travel behavior – e.g., minimal shift to work from home
- Airlines are able to operationally ramp up with demand

1. Revenue Passenger Kilometers

Source: McKinsey analysis of global aircraft demand

A1

Virus recurrence, with muted recovery

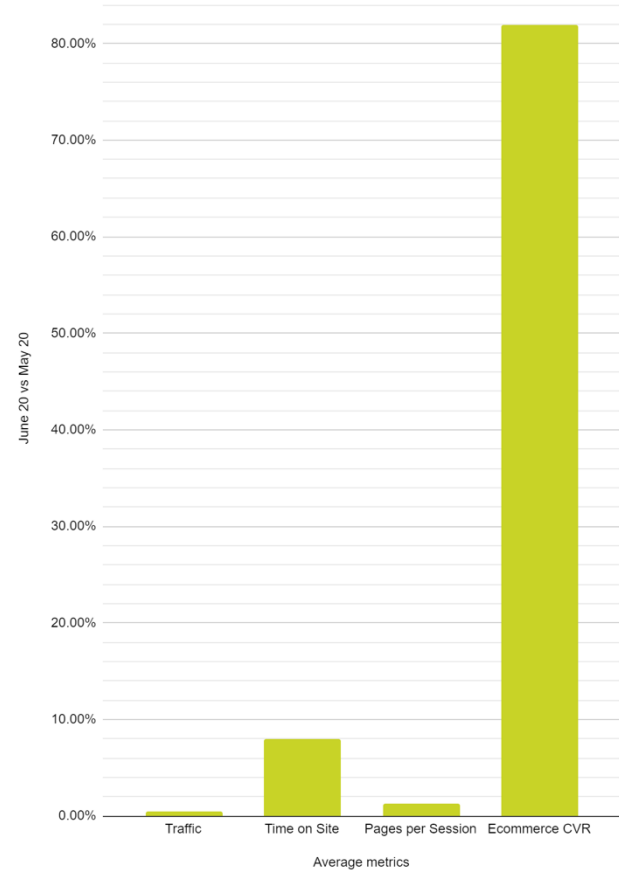


- Continued virus resurgence requires longer-term mobility restrictions
- Partially effective government interventions
- Governments remain more conservative on travel bans
- Travelers are emotionally resistant to travel for a longer timeframe,
- Some lasting changes in travel behavior
- Significant market stimulation is needed through low fares



rapidly changing behaviour.

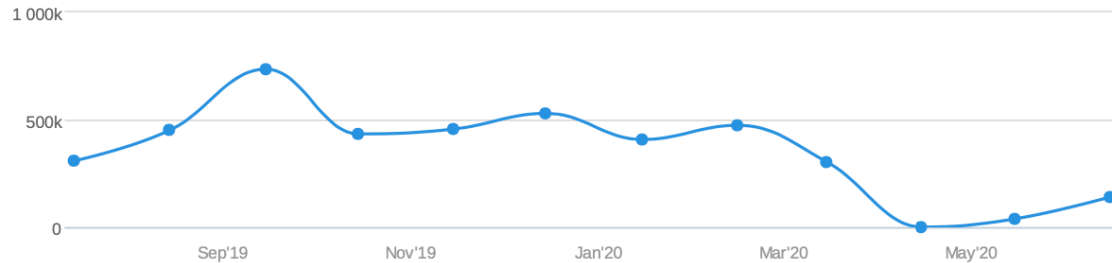
June 2020 vs May 2020



lastminute.com

Paid Search: Traffic

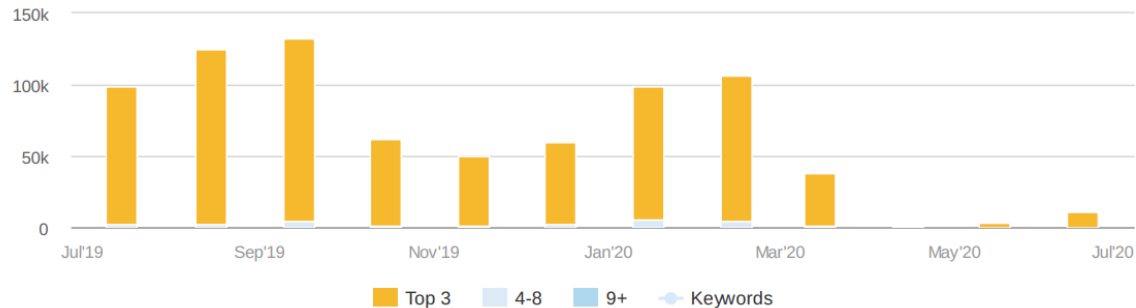
lastminute.com | UK | 1 Year



Booking.com

Paid Search: Keywords

Booking.com | UK | 1 Year



Source: SEM Rush

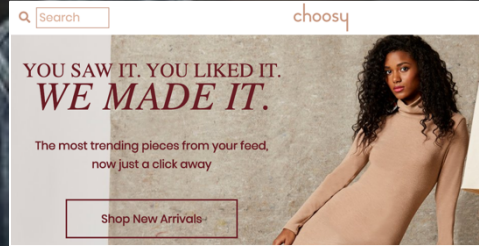


5 opportunities to beat the competition.



data is the answer.

better by design.



Covid mentions subsides, but lockdown matters



In the last month, conversations
are up 14%

Fading Trending

if.

be the answer.



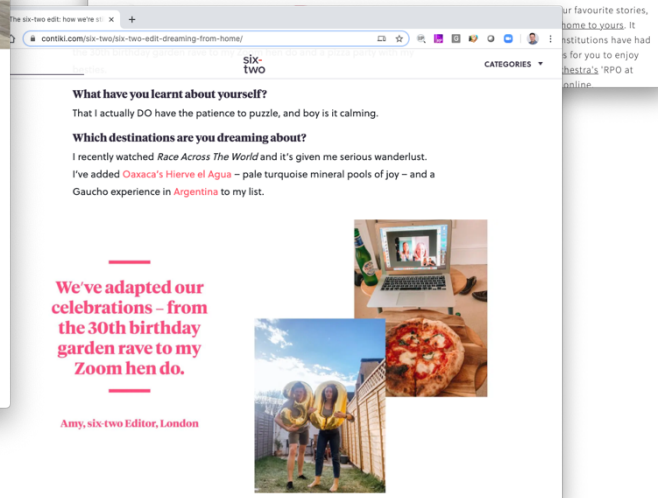
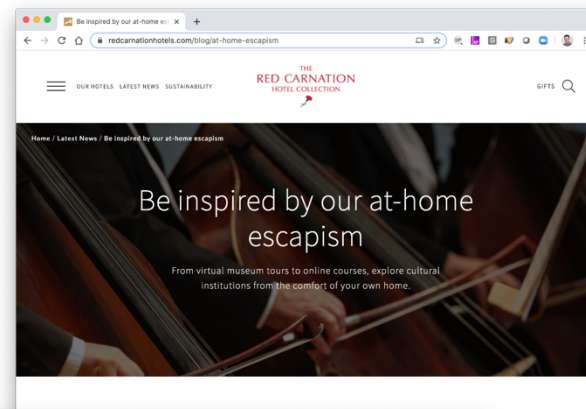
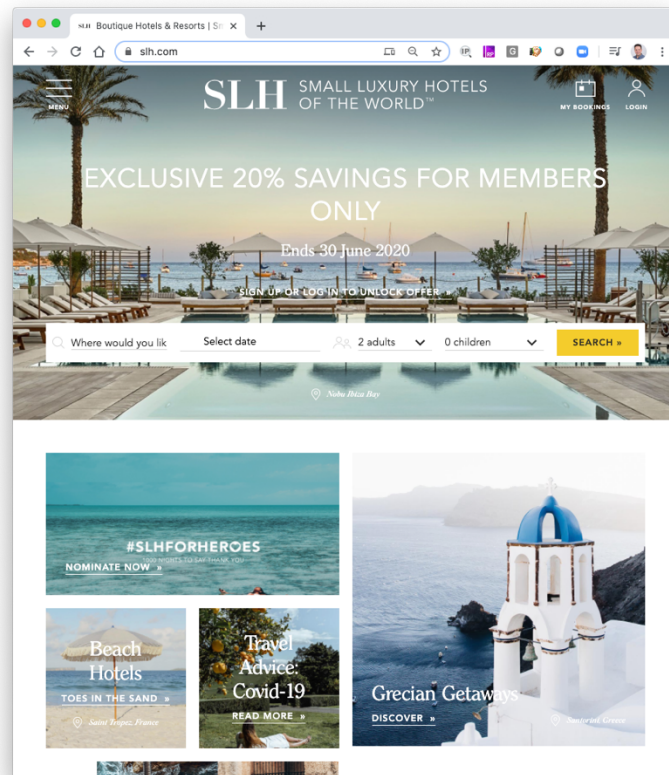
Source: <https://trends.google.com/>
16/06/2020

etihad travel voucher	1450%
are travel agents open	300%
travel zoo	170%
can we travel to spain	130%
france travel advice	130%
can we travel to wales	110%
when can i travel to spain	110%
when are travel agents open again	110%
travel to france quarantine	110%
national rail journey planner	100%
traveling to france	100%
germany travel restrictions	90%
travel to germany from uk	90%
can you travel to spain	90%
fco travel advice spain	90%

**what is your
proposition?**

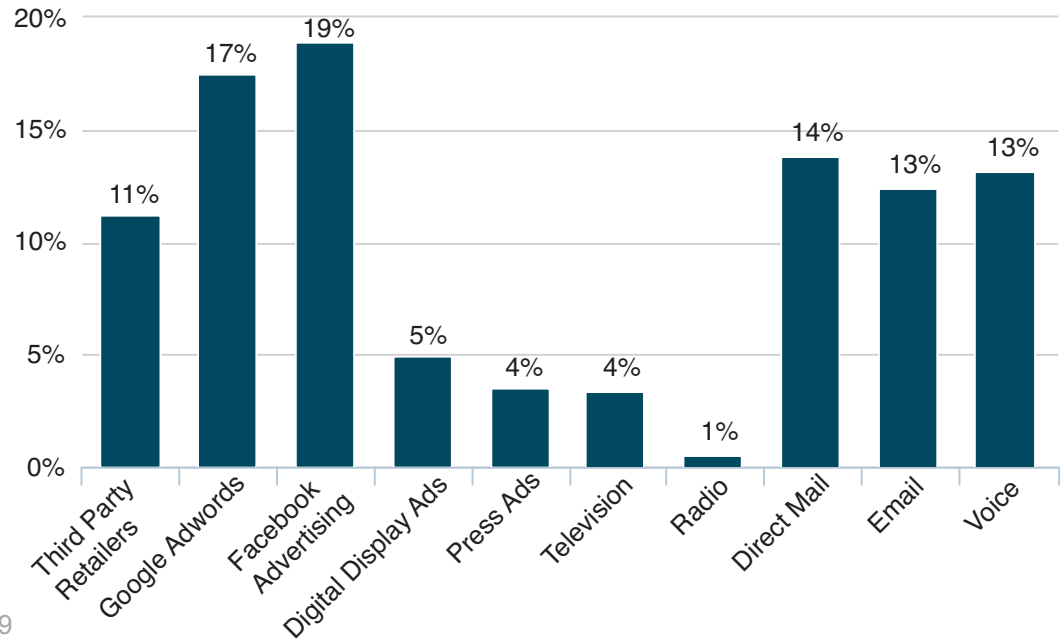
2

stay true.



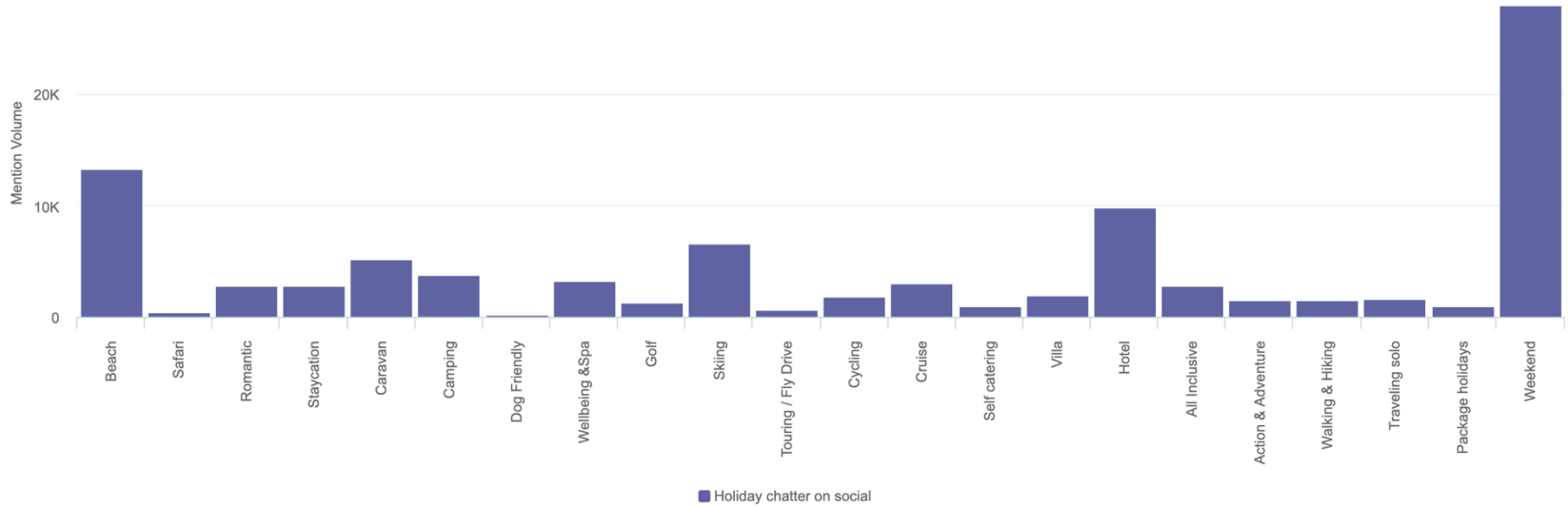
take it to your audience.

Which channels or routes to market deliver the best ROI for your business?

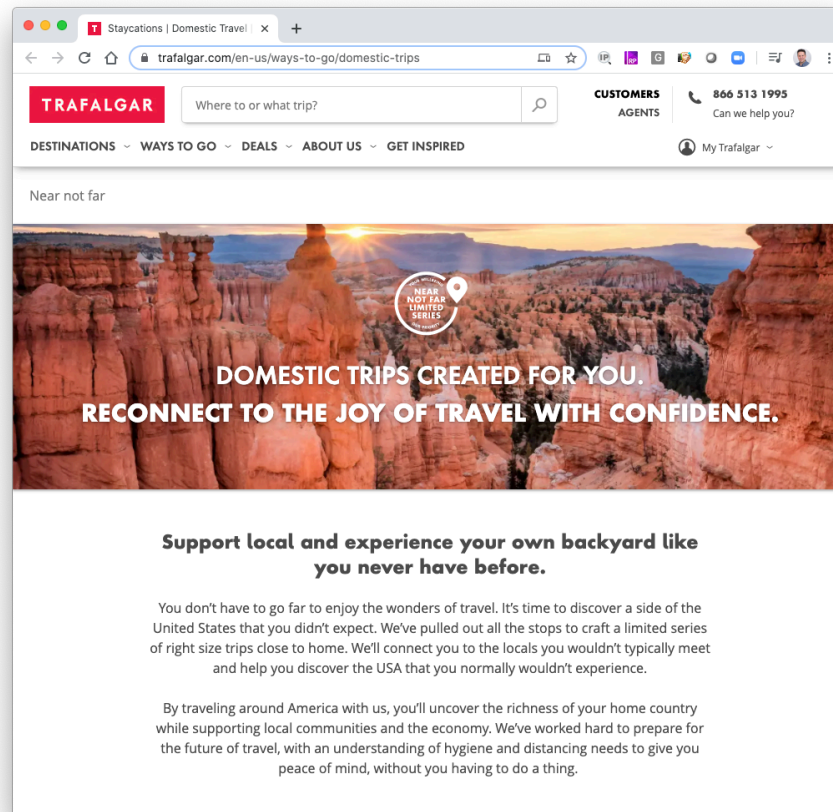
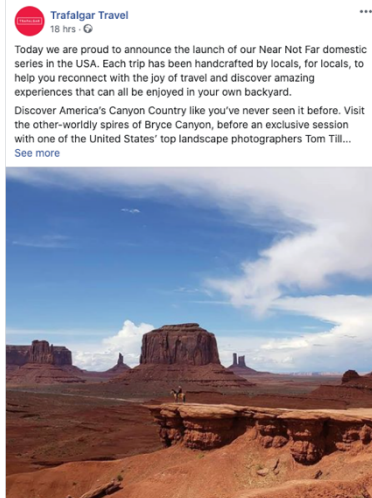


Source: Sagittarius / Travolution Travel survey 2019

time for a pivot?



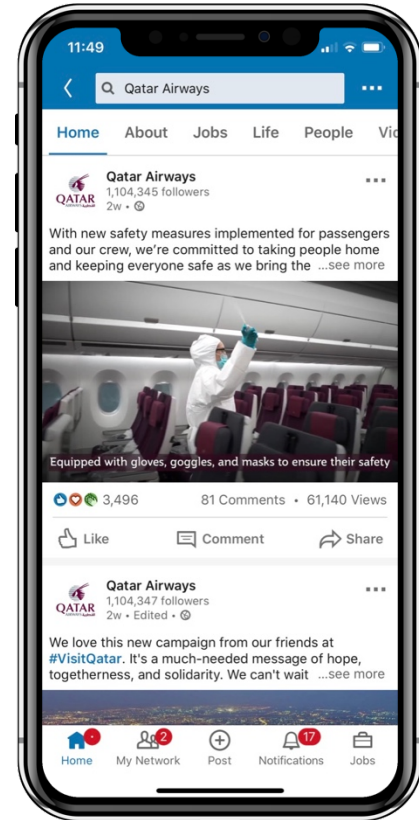
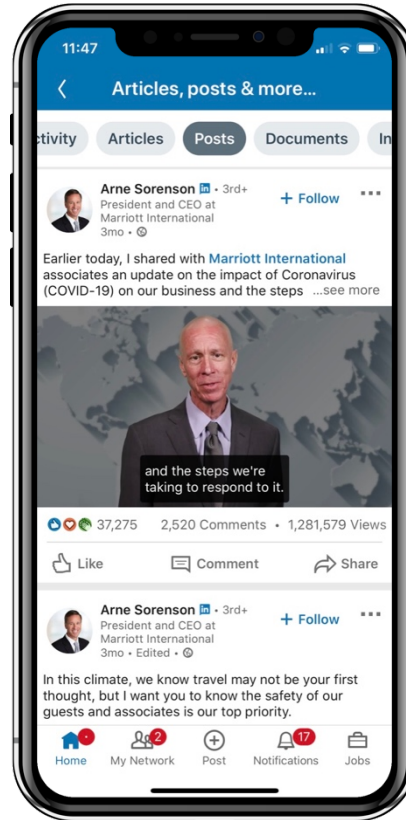
1st Mar – 15th June 2020 - More than 26,000 are discussing active holidays



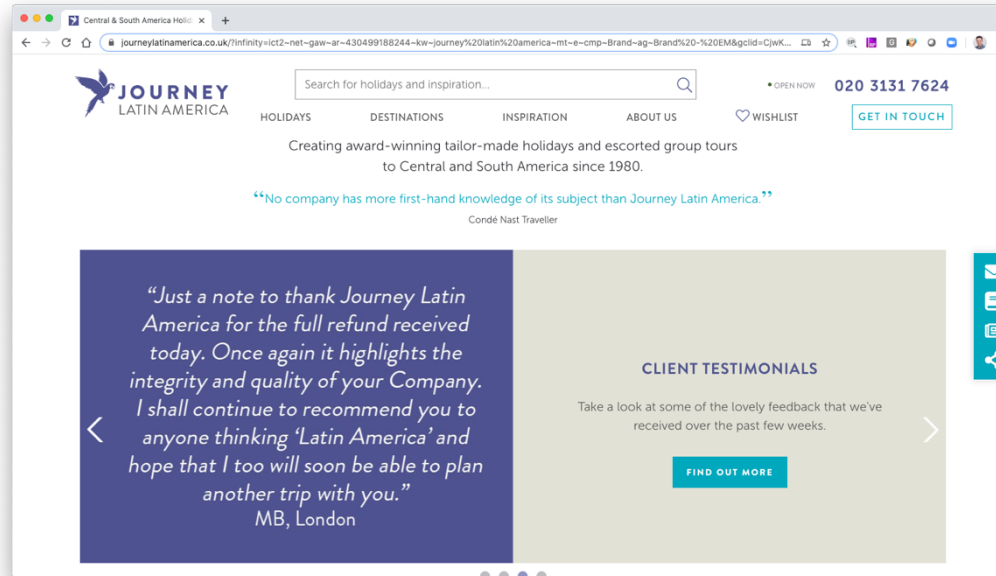
build trust.

3

be honest.



customer stories.





- 33.6% of consumers report checking reviews of businesses and services more frequently than they did before lockdown
- 73% of consumers want to see how companies are handling the virus
- 23% of consumers report decreased trust in companies since the outbreak
- 55% of consumers are more worried about online scams than they were prior to the pandemic

“Very much we see travellers wanting to start travelling again. But we also see a lot about information being very important to travellers, about what the journey is going to be like, what restrictions there might, what the border arrangements are.”



Hugh Aitken
VP Commercial, Skyscanner

Source: <https://www.travolution.com/>

reassure.



The screenshot shows a web browser window with the URL trafalgar.com/en-gb/resources/book-with-confidence. The page features a navigation bar with links: "Your Holiday Reassurance", "Free 3 Day Booking Hold", "No Risk Deposit Protection" (which is underlined), and "Flexible Change Options".

The main heading is "Book With Confidence". Below it are four columns, each with an icon and a title:

- YOUR HOLIDAY REASSURANCE**: Accompanied by a shield icon. The text states: "Trafalgar is a proud member of The Travel Corporation, the leaders in travel for 100 years. Stable and highly solvent - your future travels are safe with [US](#)."
- FREE 3 DAY BOOKING HOLD**: Accompanied by a calendar icon. The text states: "Don't miss out on securing the trip you want. Take advantage of the no obligation free 3 day [booking hold](#)."
- NO RISK DEPOSIT PROTECTION**: Accompanied by a padlock icon. The text states: "If you need to cancel your booking after deposit, we'll give you Future Travel Credit to use when you rebook with us."
- FLEXIBLE CHANGE OPTIONS**: Accompanied by a circular arrow icon. The text states: "You're free to [change your plans](#) until 30 days before your trip."

At the bottom, there is a banner image of a cityscape with hot air balloons. Overlaid on this is a white box with the text: "TRAVEL WITH CONFIDENCE", "We Are Committed to Your Wellbeing", and "We have implemented enhanced hygiene protocols and physical distancing requirements as advised by relevant health and government authorities. [Learn more here](#)".

play the
long game.

4

marketing isn't an overnight process.

UK OTAS & TOUR OPERATORS EUROPE

Travelzoo unveils new outdoor advertising campaign

By Megha Paul — On May 22, 2020



Travelzoo, the online publisher of exclusive offers and experiences for members, has unveiled a new outdoor campaign to inspire Britons to keep dreaming of and planning for holidays to take after lockdown.

Source: <https://www.traveldailymedia.com/travelzoo-unveils-new-outdoor-advertising-campaign/>

seo tactics.

- Improve user experience across your entire site
- Optimise for voice search
- Focus on topic clusters instead of keywords
- Go into detail – but only when it's relevant
- Embrace video with YouTube SEO
- Build credible backlinks
- Get a grip over technical optimisation
- Target local searchers with local landing pages and listings
- Know how to measure SEO performance

start now.

The screenshot shows a web browser window with the address bar displaying "econsultancy.com/what-you-need-to-know-about-googles-new-page-experienc...". The page header includes the Econsultancy logo and navigation links: "THE LOWDOWN", "TOPICS", "BEST PRACTICE", "TRENDS", "TRAINING", "MORE", "EconLEARN", and a search icon. The article title is "What you need to know about Google's new page experience ranking signal" by Patricio Robles, dated May 29th 2020. The article text states: "Google has announced a new signal dubbed Page Experience that it plans to incorporate into a ranking change sometime next year. Here's what you need to know about it." It then explains that the signal aims to measure the overall quality of user experience, intended to quantify how a page performs experientially, or as Google puts it, "to provide a holistic picture of the quality of a user's experience on a web page." It also mentions that the signal combines existing signals with Core Web Vitals metrics. A sidebar on the right features a "Recommend..." section with a blog post titled "Coronavirus: As social media usage soars, what are...".

What you need to know about Google's new page experience ranking signal

By Patricio Robles | May 29th 2020

SHARE

Twitter Facebook LinkedIn Email

COMM...

0

Google has **announced** a new signal dubbed Page Experience that it plans to incorporate into a ranking change sometime next year. Here's what you need to know about it.

It aims to measure the overall quality of user experience

Page experience, as the name suggests, is intended to quantify how a page performs experientially, or as Google puts it, "to provide a holistic picture of the quality of a user's experience on a web page."

It combines existing signals with Core Web Vitals metrics

Google already has a number of signals related to user experience. It has metrics for mobile friendliness, safe-browsing, the use of HTTPS security. It also checks whether certain guidelines, such as those around intrusive interstitials, are being followed.

The new page experience signal takes these existing signals and combines

Recommend...

BLOG

Coronavirus: As social media usage soars, what are...

Google's E-A-T



- **Standing for 'Expertise', 'Authoritativeness' and 'Trustworthiness', these are Google's official recommendations for delivering a quality experience online.**
- **Improve your online reputation and reviews**
- **Don't overwhelm users with ads or try to deceive them**
- **Cite and receive links from credible sources**
- **Make sure YMYL* content is supported by scientific evidence**

*Your Money or Your Life content is the type of information that, if presented inaccurately, untruthfully, or deceptively, could directly impact the reader's happiness, health, safety, or financial stability.

**take advantage of
the new normal.**

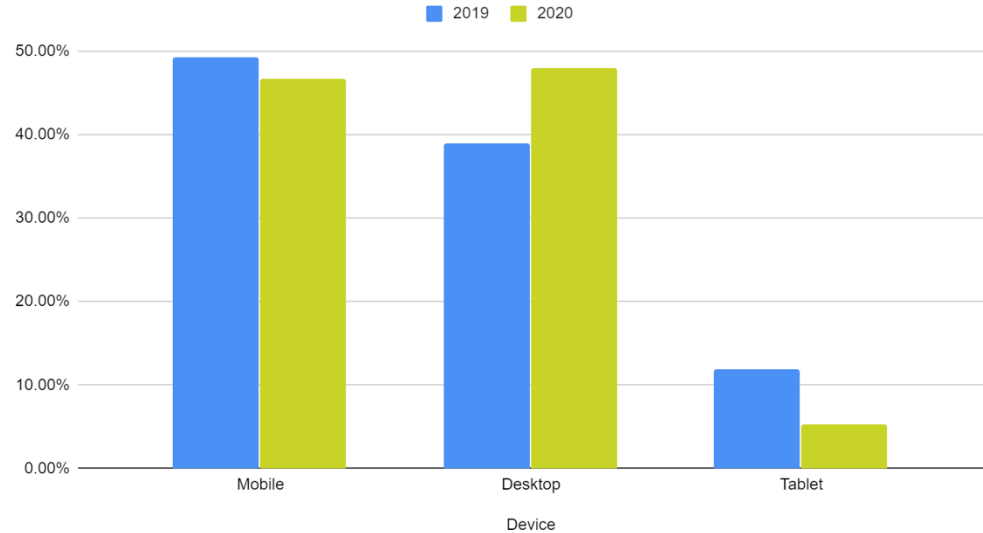
5

**“2 years of digital
transformation
in 2 months”**

Satya Nadella, CEO, Microsoft



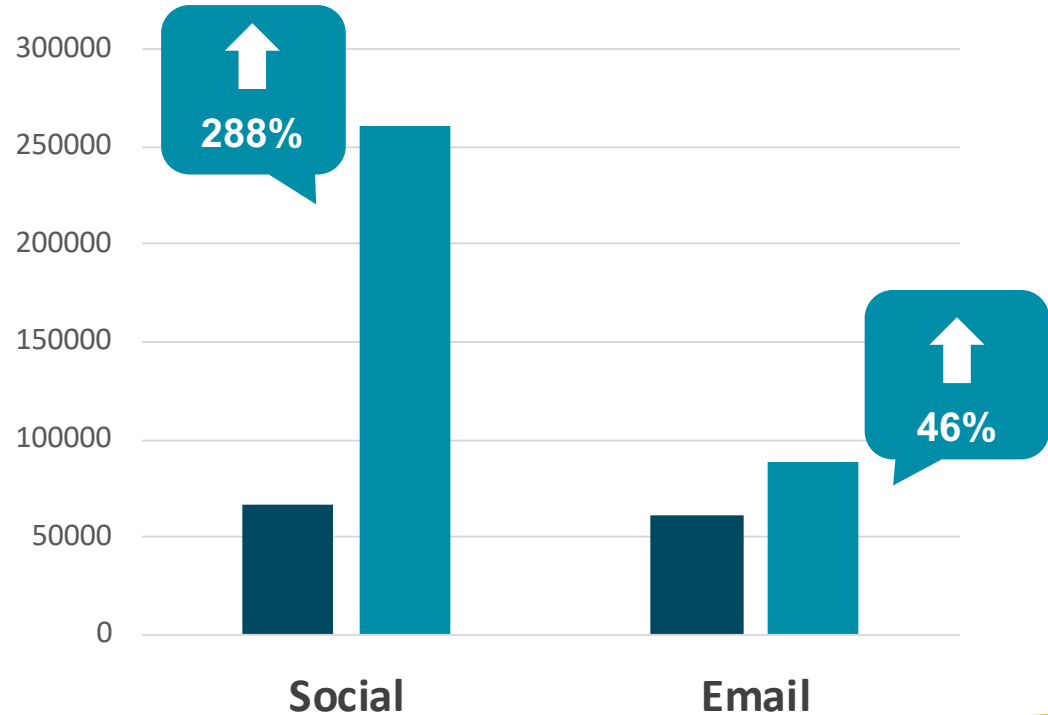
desktop is back.



Device usage – 2019 vs 2020

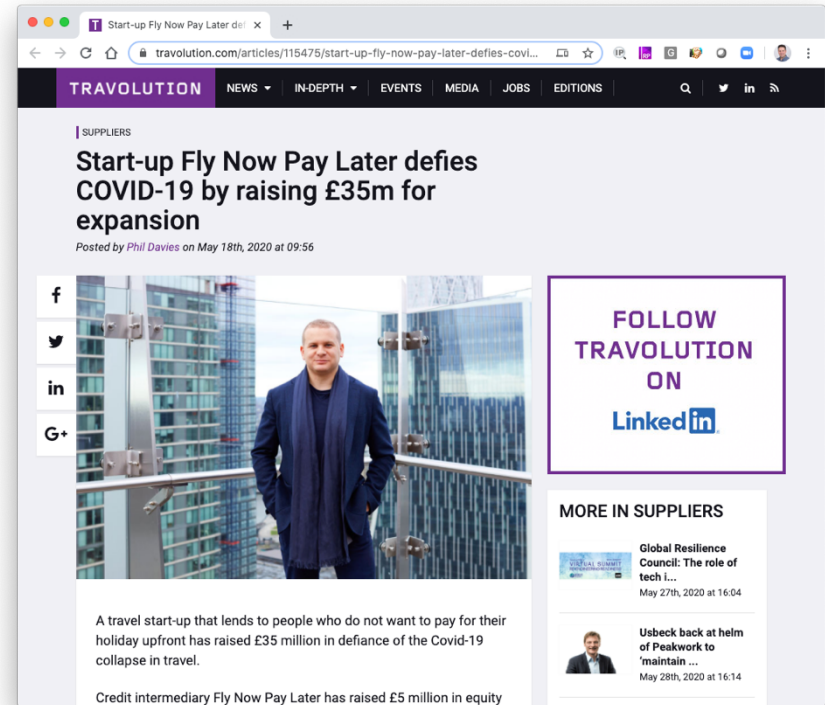
content consumption habits shifting.

TRAFALGAR



Source: Trafalgar Holidays
Mobile web site visits YoY

disruption.



A wait-and-see approach is not going to weather this storm.

“To win in this crisis, leading CMOs need an agile strategy that allows their team to detect, adapt to, and respond to changes”



Haixa Wang,
VP Skift Research

Source: <https://skift.com/2020/05/21/covid-19-travel-marketing-strategies-pivot-messaging/>

experience optimisation (XO).

➤ What our teams within XO do, in easy accessible language...

data /insight.

We have central responsibility for the organisation of, control and harvesting of data with the goal of knowing everything about a client's customer.

The more we know, the more targeted, relevant and optimised the rest of Sagittarius work becomes across teams.

strategy.

We are primarily positioned to understand the client's existing vision, goals and intended audiences.

Taking analysis and insight, mapping this against the client's aspirations, to help design a plan for the next 12/24/36 months that delivers on the clients/brands targets.

multi-channel marketing.

We take the strategic approach and decide which channels to best reach the intended customer base at the right time and place with the right messages.

Typically this relates to search engines:

- Making a site highly visibly
- Connecting a site's content to the users intent.

creative/ content.

We create the stuff people see, read and watch. Across every part of a customer journey the content is crucial.

Before they even arrive on a website, the customer will have read the messages within search, seen the adverts on social etc.

On arrival at the website they should be inspired by product/services details that drive them to engage.

ux/ui.

We are responsible for the onsite experience.

The way that information is presented, how best to navigate the site including the order in which the customer encounters the things they are looking for.

Our priority is ease and pleasure of use in order to promote a return visit and deeper brand relationship.

not one size fits all.

- all our clients are different with differing levels of maturity and success across the areas of their customer experience efforts.
- to align ourselves succinctly to such a wide variation of client statuses we've established three levels of XO delivery to match client desire and market position.

Catch Up

For brands that are experiencing challenging times, have been through recent change and simply want to get back on a level playing field to compete again.

Keep Up

For brands that feel they are performing well among peers, but recognise there are always new ways to improve on their customer experience to keep hitting targets.

Stay Ahead

For brands that lead the way in their sector but want to build upon their competitive advantage and further protect themselves from potential disruptors in the space.

thank you.



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- @paulrstephen