



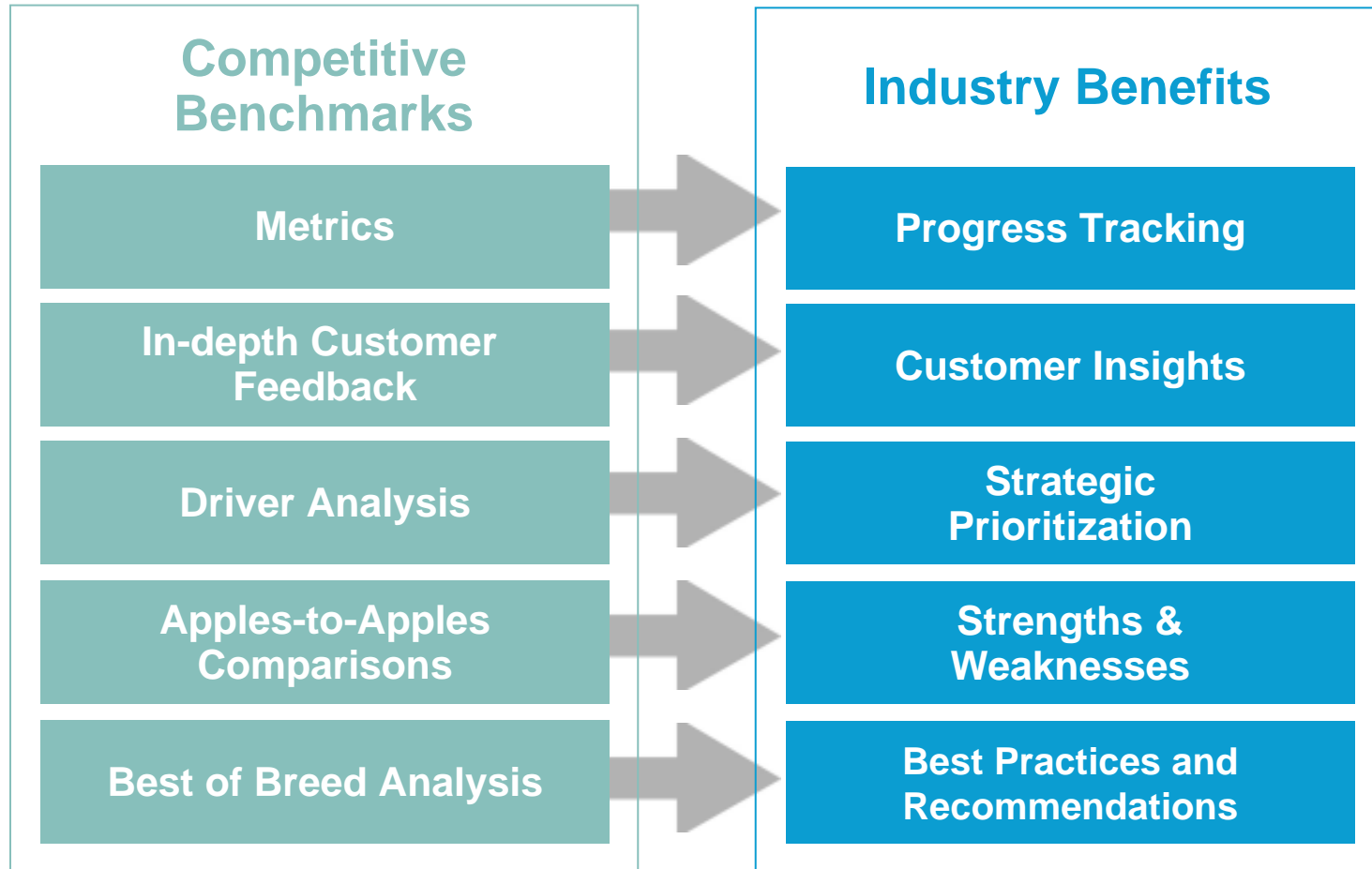
KEYNOTE[®]
The Mobile & Internet Performance Authority[™]

Keynote Customer Experience Rankings

CRUISE

Wave 4 - May 2007

Introduction: Keynote Customer Experience (CE) Rankings Metrics to Manage eBusiness Success



CE Rankings Methodology: Sites & Sample

SITES EVALUATED:

- Carnival
- Celebrity
- Cheap Tickets
- Expedia
- Holland America
- Norwegian
- Orbitz
- Princess
- Royal Caribbean
- Travelocity

SAMPLE:

- 10 evaluations; 2000 panelists
- 200 per site, US online adults 21+
- Have previously taken a cruise (~50%) or are interested in taking a cruise in the future (~50%)

TIMING:

- **Wave 4 evaluation period: May 9 – 23, 2007**
- Wave 3 evaluation period: April 20 – 26, 2006
- Next study delivered: May 2008

Executive Summary: Overall

- Gaining two positions from 2006, Expedia now provides the best overall customer experience for cruise sites
 - ▶ Moves into first place on conversion intent and customer satisfaction
 - ▶ 2nd place for brand perceptions, behind RCCL
 - ▶ Perceived more than any other site as “helpful”, “reliable” and “trustworthy”
 - ▶ Areas of strength include booking, design & organization, customer support, cruise research, flight & lodging research and comprehensiveness
- Travelocity is 2nd place overall
 - ▶ In the top tier of sites for brand perceptions, conversion and customer satisfaction
 - ▶ Perceived more than any other site as a “good value”
 - ▶ Areas of strength include booking, design & organization, customer support, cruise research, and flight & lodging research
- Royal Caribbean places 3rd overall
 - ▶ 1st for brand; perceived more than any other site as “exciting,” and “friendly”
 - ▶ Strongest cruise line for conversion and customer satisfaction (ranking 3rd overall)
 - ▶ In the top tier for booking, customer support and cruise research
- Carnival is most improved, moving up from 7th to 4th overall
 - ▶ Gains significantly on all four Keynote indices and on 2 of 5 top drivers

Executive Summary: Overall

- Booking is now the most predictive driver of brand perceptions and people's likelihood to use the site in the future
 - ▶ Activities research has dropped to become the 3rd most important factor
 - ▶ Design and organization, customer support, cruise research also remain key drivers
- Several sites experience shifts in performance year-over-year on Keynote indices and key success drivers
 - ▶ Carnival, Holland America and Norwegian improve overall; Cheap Tickets drops
 - ▶ Carnival and Norwegian improve on brand
 - ▶ Carnival and Norwegian improve on conversion; Cheap Tickets drops
 - ▶ Carnival, Holland America and Norwegian improve on customer satisfaction; Cheap Tickets falls
 - ▶ Carnival and Norwegian improve on booking; Princess falls
 - ▶ Travelocity, Carnival, Celebrity, RCCL and Cheap Tickets decline on design and organization; Norwegian improves
 - ▶ Norwegian and Holland America improve on activity research; RCCL and Travelocity drop
 - ▶ Carnival and Norwegian drop on customer support
 - ▶ Carnival, Holland American and Norwegian improve on cruise research

Index Rankings Summary

RANK	Overall CE Index	Brand Impact Index	Conversion Impact Index	Customer Satisfaction Index
1	Expedia (3)	Royal Caribbean (1)	Expedia (3)	Expedia (2)
2	Travelocity (1)	Expedia (3)	Travelocity (1)	Travelocity (1)
3	Royal Caribbean (2)	Travelocity (2)	Royal Caribbean (2)	Royal Caribbean (3)
4	Carnival (7)	Carnival (7)	Carnival (7)	Celebrity (4)
5	Celebrity (4)	Celebrity (4)	Celebrity (4)	Carnival (8)
6	Princess (5)	Princess (5)	Orbitz (5)	Princess (5)
7	Orbitz (6)	Holland America (8)	Princess (6)	Orbitz (6)
8	Holland America (9)	Orbitz (6)	Norwegian (10)	Holland America (9)
9	Norwegian (10)	Norwegian (10)	Holland America (9)	CheapTickets (7)
10	CheapTickets (8)	CheapTickets (9)	CheapTickets (8)	Norwegian (10)

Parentheses indicate April 2006 ranking (Green moved up in rank, Red moved down)

= Indicates a significant change in score from April 2006