

SEO Market Opportunity Analysis for a Travel Vertical

Keyword, intent and competitor-ranking analysis across Spain, France and the UK.

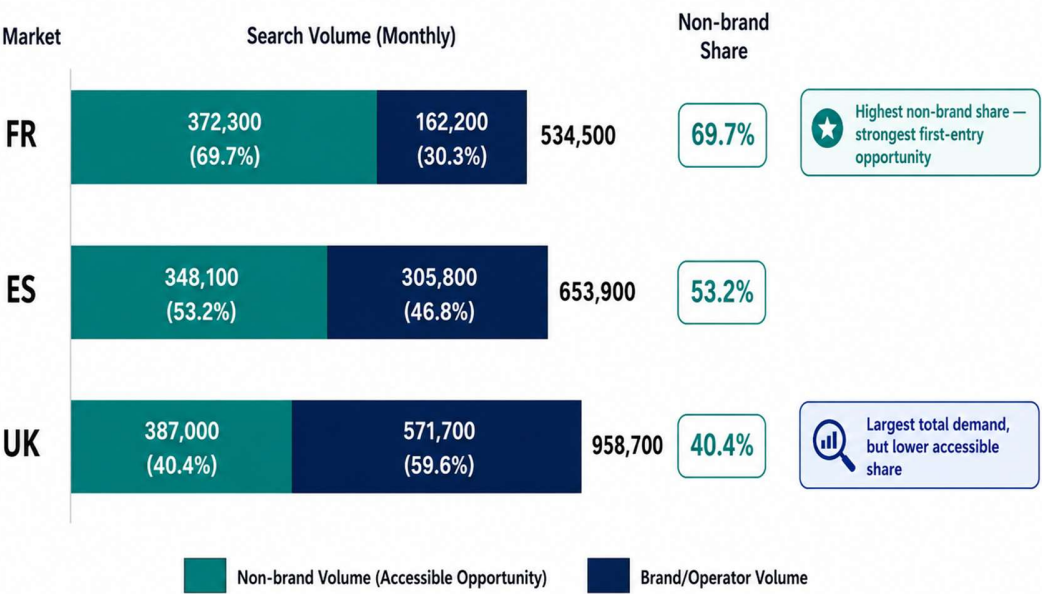
Executive takeaway

Raw search demand and accessible SEO opportunity were not the same. The UK had the largest total volume, but France had the strongest non-brand share and the clearest first-entry opportunity. The recommended launch sequence was France first, Spain second, and a selective UK pilot, with city-to-city route pages as the core scalable SEO asset.

Metric	Value	Note
Total monthly searches	2,147,100	Clean, non-duplicate keyword rows
Non-brand monthly searches	1,107,400	Addressable demand
Transactional monthly searches	1,232,500	Commercial demand
Markets analysed	3	Spain, France and the UK
Recommended first market	France	Highest non-brand share
Core page type	Route pages	Scalable SEO asset

Accessible SEO Opportunity by Market

Total search demand vs. non-brand demand in the bus travel SEO category



1. Business Context

A European online travel company was evaluating whether to launch a dedicated organic search vertical for bus travel. The analysis needed to determine whether the opportunity was large enough to justify investment, which country should be prioritised first and which page type should anchor the SEO strategy.

Business question

Which market should be prioritised first, and which page type should anchor the launch strategy?

Analytical questions

- Is bus travel a meaningful organic search opportunity across Spain, France and the UK?
- How much of the demand is accessible non-brand demand rather than operator-led demand?
- Which markets show the strongest combination of demand, commercial intent and competitive accessibility?
- Which keyword segments should drive the first page templates and internal linking architecture?

2. Data Scope and Preparation

The analysis used a supplied keyword and competitor-ranking dataset as the primary source for opportunity assessment. The data was cleaned and structured into an analysis-ready workbook with documentation, quality checks and SQL examples for reproducibility.

Keyword data	Bus-related queries by market, including average monthly searches, competition, CPC and intent classification.
Ranking sample	Competitor ranking rows with domain, keyword, estimated position and estimated monthly traffic.
Cleaned crosswalk	Joined keyword-market view combining demand, intent, segment and ranking-sample signals.
QA documentation	Data dictionary, quality checks and reproducibility examples to make assumptions visible.

3. Cleaning and Modelling Approach

The dataset was treated as an internal data handoff: useful, but requiring inspection before analysis. The cleaning process focused on preserving analytical transparency while avoiding inflated demand totals.

- Normalised keywords to support matching, duplicate checks and cross-table joins.
- Flagged duplicate keyword-market rows before aggregating demand.
- Separated brand/operator demand from non-brand demand to estimate addressable opportunity.
- Classified queries into analytical segments such as Route Query, Price/Cheap, Airport Transfer and Schedule/Timetable.
- Inferred missing ranking markets where the route, language or competitor domain made the market clear, while keeping match status for transparency.
- Classified competitors by player type: Operator, Aggregator/OTA, Marketplace or Unclear.

4. Key Findings

Market-level opportunity

The cleaned dataset contained 2.15M monthly searches across the three markets. However, total demand alone did not identify the best launch market. France had the strongest non-brand share, while the UK had the largest raw volume but a larger share tied to strong operator brands.

Market	Total Search Volume	Non-brand Volume	Brand/Operator Volume	Non-brand Share	Transactional Volume
ES	653,900	348,100	305,800	53.2%	337,200
FR	534,500	372,300	162,200	69.7%	365,100
UK	958,700	387,000	571,700	40.4%	530,200

Demand composition

Route Query demand was the strongest scalable segment across the markets, supporting a route-page-led launch rather than a blog-first strategy. Price/Cheap demand was especially relevant as a support layer, while Schedule/Timetable intent should be integrated into core commercial pages rather than treated as isolated informational content.

5. Strategic Recommendation

Priority	Market	Rationale	Recommended approach
1	France	Highest non-brand share and most accessible first-entry opportunity.	Launch route pages first, then support with value-led pages where justified.
2	Spain	Strong route demand and meaningful timetable/support intent.	Launch route pages second, with timetable and operational modules integrated into templates.
3	UK	Largest raw demand, but stronger operator-brand concentration.	Run a selective pilot around major routes and airport-transfer opportunities.

Recommended page architecture

The core SEO asset should be city-to-city route pages. These pages can combine commercial intent, comparison logic, timetable information, operator coverage and internal links to related routes, country hubs and supporting commercial pages.

- Launch route pages first for priority markets and high-demand route clusters.
- Support route pages with country hubs, related route links and value-led copy modules where price-led demand exists.
- Deprioritise pure operator-brand landing pages in the initial phase because they are less defensible for a new entrant.
- Use multi-modal travel positioning as a differentiator where users may compare bus options with nearby travel alternatives.

Strategic conclusion

France should be the first launch market, Spain should follow as the second market, and the UK should be approached as a selective pilot. Route pages should anchor the vertical because they offer the strongest combination of scale, intent and template repeatability.

6. Reproducibility and Supporting Files

The accompanying workbook is designed as a data appendix rather than a visual dashboard. The project page presents the charts and narrative, while the workbook allows reviewers to inspect the cleaned data, summary tables, QA checks and SQL logic behind the analysis.

Cleaned workbook	Includes README, Executive_Summary, Summary_Tables, Keyword_Clean, Rankings_Clean, Crosswalk, Data_Dictionary, QA_Log and SQL_Examples.
Formula-driven summaries	Executive and summary tables are calculated from cleaned keyword and ranking tables rather than typed manually.
SQL examples	Replicate the main aggregations: total demand, non-brand opportunity, intent mix, segment summary and competitor landscape.
Data dictionary and QA log	Document field meanings, duplicate handling, review flags and ranking match status.

7. Limitations

- The analysis is directional and based on a supplied dataset rather than a live, full-market crawl.
- Competitor tables reflect the available ranking sample and should not be read as a complete SERP census.
- Some ranking markets were inferred from route, language or domain context; match status is retained for transparency.
- Before implementation, the strategy should be validated against current keyword data, live SERPs, inventory depth and technical feasibility.

8. What This Case Demonstrates

- Data cleaning and preparation from an imperfect source dataset.
- Ability to distinguish raw volume from addressable business opportunity.
- SEO analytics translated into market prioritisation and page-architecture decisions.
- Reproducible reporting using structured tables, QA checks and SQL examples.
- Clear communication of assumptions, limitations and business recommendations.