

THE AFRICAN TRAVELLER REPORT

PAIN POINTS, PREFERENCES AND ASPIRATIONS OF
THE AFRICAN TRAVELLER

November 2016

Sabre



METHODOLOGY



7,000 people answered our screening question – when was the last time you travelled by air?

We surveyed the 1,600 people that stated they had travelled by air within past 24 months

Travellers from four countries surveyed
Asked a series of questions about air travel

Commissioned by Sabre
Surveys taken via mobile phones between
September and November 2016

OPPORTUNITY WITHIN A CHALLENGING MARKETPLACE

Main findings from our report

- | Air travel remains inaccessible to majority of African citizens
- | Pan-African passport could increase air travel spend by 24%
- | Many traveller pain points are within an airline's control to address
- | Travellers willing to spend over \$100 on ancillary services – golden retail opportunity for African carriers

“Although the African travel landscape will remain a challenge, there are great opportunities for carriers that can address traveller pain points, while providing products and services to improve and personalise the travel experience”

Dino Gelmetti, VP EMEA, Airline Solutions, Sabre

TRAVEL REMAINS INACCESSIBLE TO THE MAJORITY

23% of Africans have travelled by air in the past 24 months



WHAT PREVENTS AFRICAN CITIZENS FROM TRAVELLING MORE

TRAVEL EXPERIENCE

STRESSFUL

DIFFICULTY
BOOKING

THE FLIGHT ROUTES
ARE TOO COMPLICATED

LACK OF
ROUTES

TOO
EXPENSIVE

DIFFICULTY
GETTING
VISAS

SAFE
NO DESIRE TO
TRAVEL

DON'T FEEL

WHAT PREVENTS AFRICAN CITIZENS FROM TRAVELLING MORE

All but one within an airline's control

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BIGGEST PAIN POINTS FOR AFRICAN TRAVELLERS

Frustrations start before travellers even take their trips

34%



The flights I want are often unavailable

33%



The prices I am quoted often change before I have made my booking

20%



The websites I use to book travel often crash

22%



The websites I use to book travel are often confusing

BIGGEST PAIN POINTS FOR AFRICAN TRAVELLERS

And this is what they like least about the travel experience

- 
- 27%** The check-in process takes too long
 - 22%** The check-in procedure is confusing for passengers
 - 21%** It takes too long to proceed through the airport
 - 20%** There's not enough entertainment onboard the plane

AFRICAN UNION PASSPORT: A TRAVEL GROWTH OPPORTUNITY

In 2018, African citizens are eligible to receive the African Union's pan-African passport, eliminating the need to obtain VISAs for travel within the continent. This would result in **24 percent more spent** on air travel.



WHERE THAT EXTRA SPEND IS LIKELY TO BE SEEN

Top travel destinations selected



Nigeria

1. Benin
2. Botswana
3. South Africa
4. Algeria



Kenya

1. South Africa
2. Seychelles
3. Egypt
4. Nigeria



South Africa

1. Egypt
2. Mauritius
3. Botswana
4. Mozambique



Egypt

1. Morocco
2. South Africa
3. Algeria
4. Tunisia

WHAT WOULD MAKE PASSENGERS CHOOSE THEIR LOCAL AIRLINE OVER A FOREIGN CARRIER



Nigeria



Greater comfort on board



Latest technology



Products and services that are tailored towards me individually



Superior customer service



Kenya



Cheaper tickets



Superior customer service



Pride in my country



Latest technology



South Africa



Cheaper tickets



Greater comfort on board



Latest technology



Superior customer service



Egypt



Cheaper tickets



Greater comfort on board



Latest technology



Superior customer service

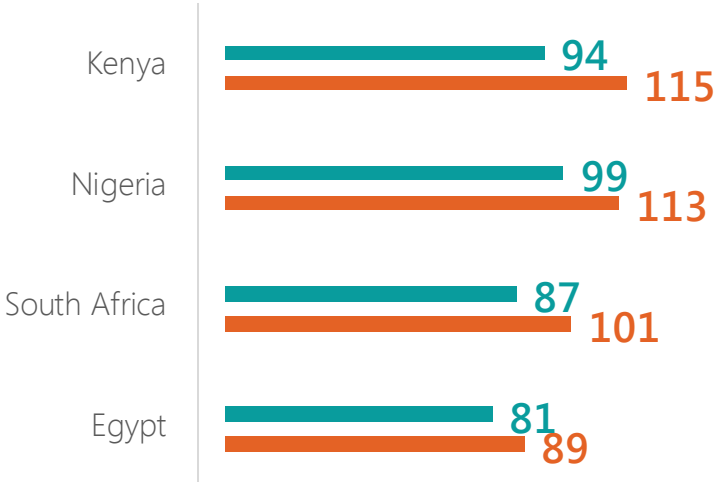
TRAVELLERS WILLING TO SPEND MORE ON ANCILLARY SERVICES

Significant retail opportunity for airlines



Current spend per traveller on ancillaries

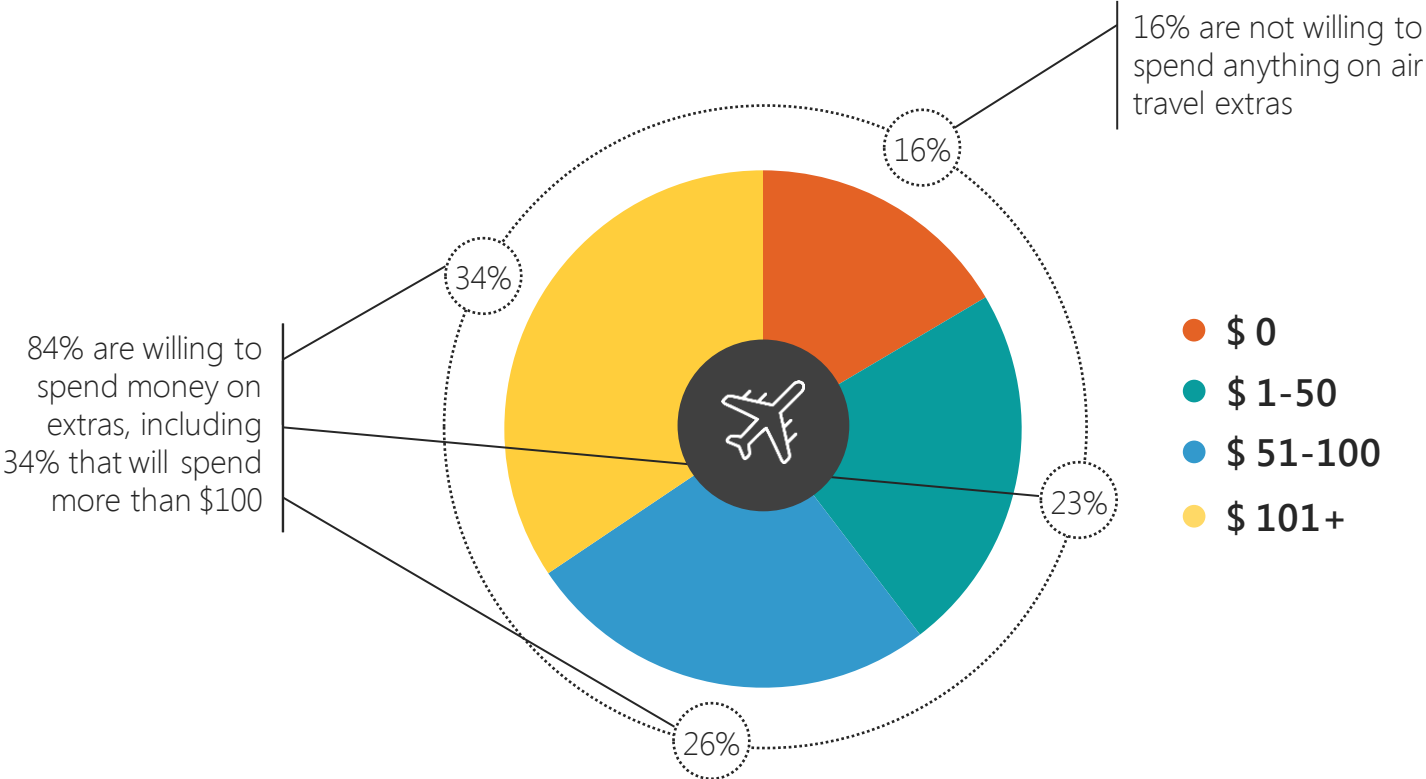
Potential spend per traveller on ancillaries



■ Spent on last trip ■ Willing to spend

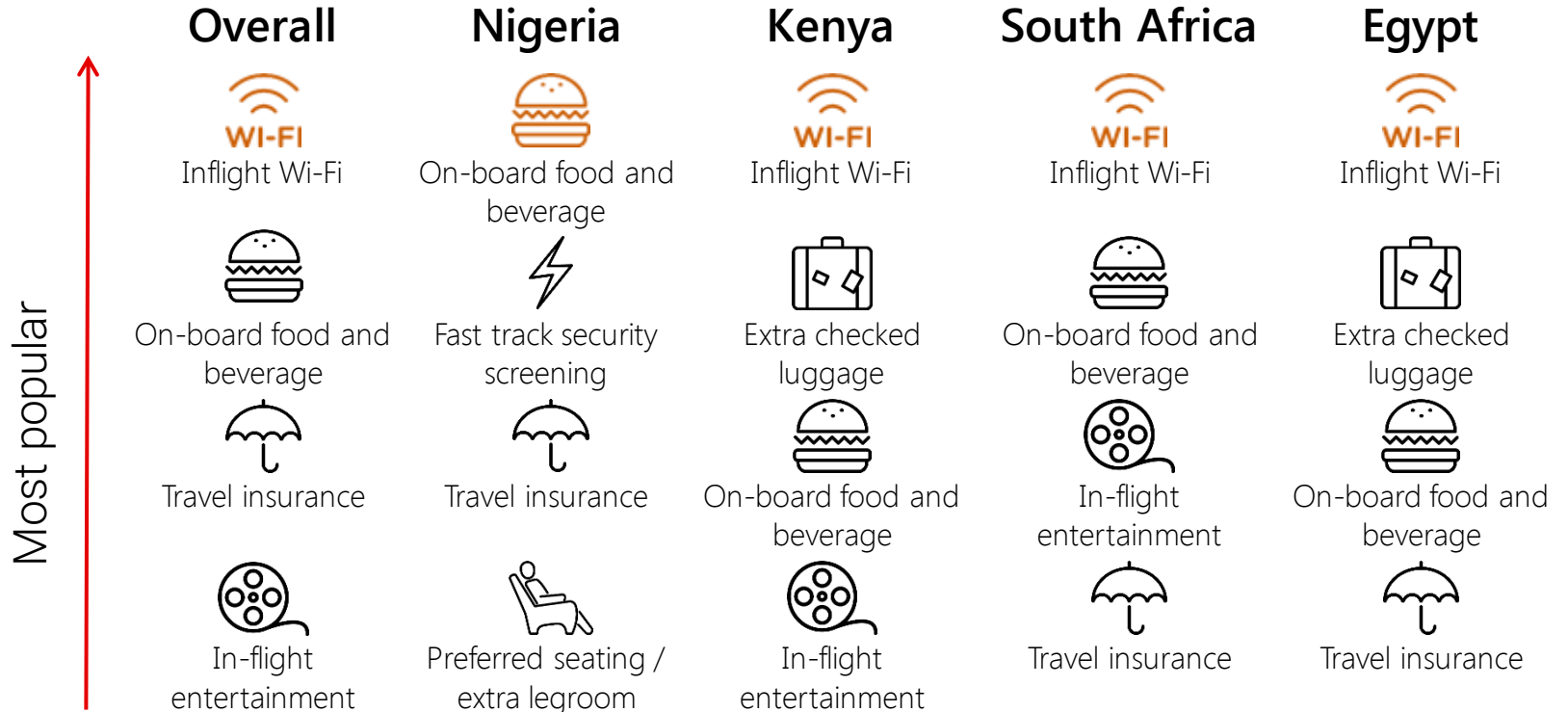
MANY TRAVELLERS WILL SPEND SIGNIFICANTLY ON AIR EXTRAS

84% are willing to spend on ancillaries - and one third would spend more than \$100



WHAT THEY WOULD SPEND MONEY ON

The popularity of each ancillary varies between countries



HOW AIRLINES CAN REACH THOSE SEARCHING FOR TRAVEL

When shopping and booking travel, inspiration comes from many sources



51%



21%



19%



15%



14%



12%

RECOMMENDATIONS

Five steps for African carriers to increase wallet share

Make travel easy and accessible – break down barriers to travel by optimising routes and pricing, and improving the shopping, booking and check-in experience

Future-proof your airline – Invest in the right technology to identify new routes and markets early to take advantage of pan-African passport introduction

Ensure travellers choose your airline – invest in technology, service and comfort for travellers, and help them find your lowest prices

Inspire travellers – adopt a multi-channel sales strategy across both new and traditional channels, such as through travel agents, websites and mobile

Operate like a retailer – invest in data-harnessing technology to help understand each traveller's individual needs, offering each person the right product in the right context at the right time

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