

PERSONALISATION AND THE REGIONAL TRAVELLER

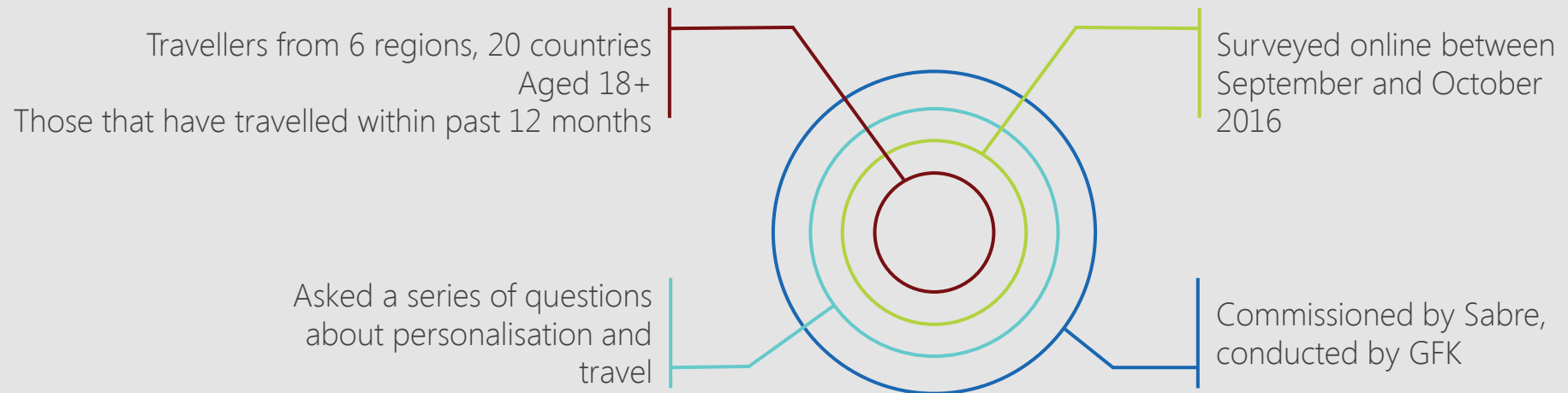


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METHODOLOGY

How does personalisation impact the traveller's journey?

FINDINGS: The research provided data on how consumers in each region make decisions and shop for travel services, in particular, for air ancillaries, in order to understand how personalisation impacts the traveler consumer journey.



WHAT IS PERSONALISATION

We asked people what the term 'personalisation' meant to them. People from around the world stated that personalisation is a combination of a number of factors. It's clear that personalisation encapsulates all of the below.

94%



Companies allow me to pick and choose my own travel add-ons to create a personalised experience

87%



Companies address me by name in communications

86%



Companies only send me offers and services that are relevant to my interests / situation

84%



Companies know my past history with them and reflect this in their correspondence with me

82%



Companies only send me offers and services that are relevant to my location

PERSONALISATION OF A TRIP

For a large majority of travellers, ancillaries play a key role in personalisation. Eighty percent of travellers currently purchase extras when flying – and an overwhelming majority want to be able to choose the add-ons extras that have value to them as an individual. Travellers no longer want a standard deal.

94%



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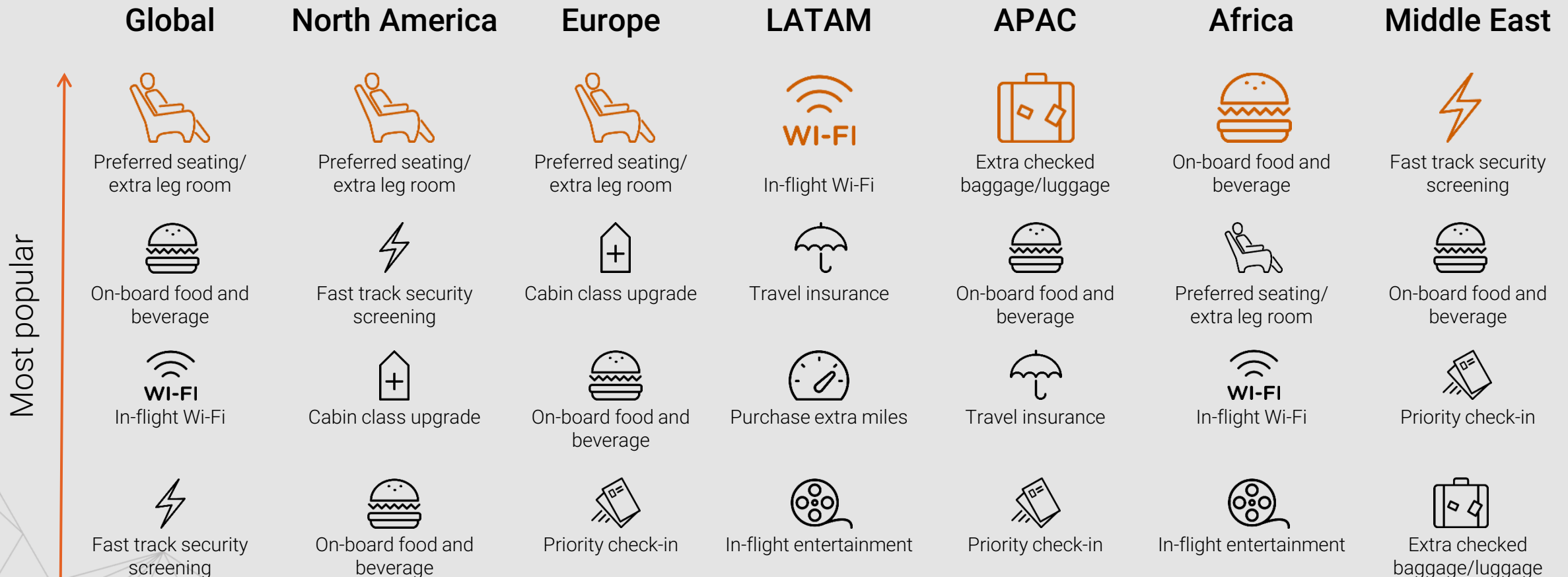
80%



80% of travelers acquire extras when flying

PERSONALISATION OF A TRIP

Travellers ranked ancillaries in order of which ones they thought would most help them to have a personalised flight:



GLOBAL SPENDING ON PERSONALISATION

For their last trip, travellers spent \$62 on ancillaries to personalise their flight. However when asked how much they would be willing to spend to have a truly personalised flight, **travellers stated that they would spend an average of \$98 on the right extras.** This represents a huge retail opportunity for airlines.

Current spend per head



Average amount people would spend on air ancillaries

Our respondents said that they were most likely to spend on the following:

	Cabin class upgrade	11.1%		Priority check-in	7.5%
	On-board food and beverage	11%		Priority boarding	7.3%
	Preferred seating/extra leg room	11%		Fast track security screening	7.2%
	In-flight Wi-Fi	9.3%		In-flight entertainment	7%
	Extra checked baggage/luggage	9%		Lounge access	7%
	Travel insurance	8.2%		Purchase extra miles	4.6%

SPENDING BY REGION

There are significant differences between regions in terms of current spend and willingness to spend on air ancillaries:



CURRENT SPEND

Africa	\$95
APAC	\$63
Middle East	\$58
Europe	\$55
LATAM	\$55
N. America	\$44

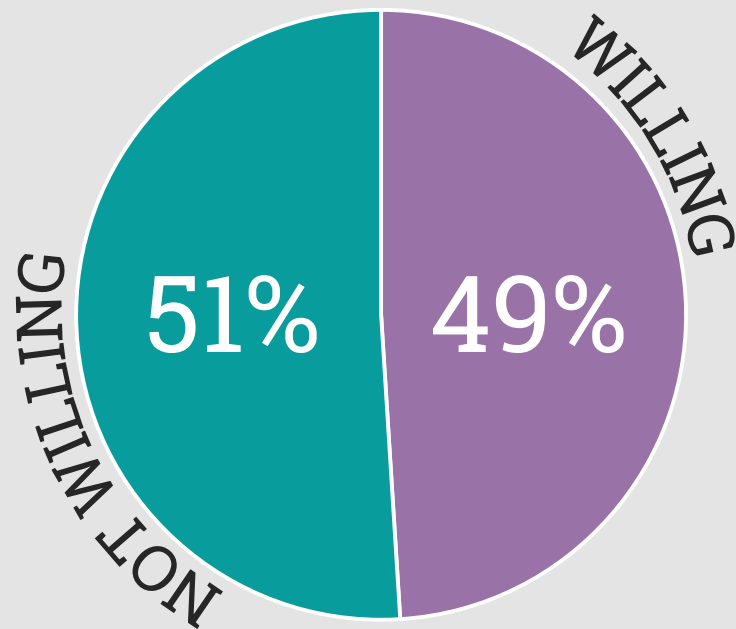


WILLING TO SPEND

Africa	\$144
LATAM	\$114
Middle East	\$91
N. America	\$88
Europe	\$82
APAC	\$76

PERSONALISATION AND PRIVACY

Respondents globally were divided on willingness to share basic information about themselves in return for personalised offerings. Asian travellers are most willing to share information, whilst Middle Eastern travellers are least willing. Airlines need to show people the value of sharing their information, providing powerful incentives and personalised services.



MOST WILLING

APAC	64%
Africa	48%
LATAM	48%



LEAST WILLING

Middle East	44%
Europe	44%
North America	46%

INTERACTION WITH TRAVELLERS

The travel industry needs to consider how to interact with its travellers throughout their journeys; while booking using technology is universally preferred, human interaction still plays a significant role for many. Both airlines and agents can become experts and advisors to their travellers, adding value to the travel experience.

LATAM travelers see more importance in human interactions

48% of travellers from LATAM think it's important to be able to talk to an actual person when planning and booking travel

It is important to be able to talk to an actual person when planning and booking travel:

