THE AFRICAN TRAVELLER REPORT

PAIN POINTS, PREFERENCES AND ASPIRATIONS OF THE AFRICAN TRAVELLER

November 2016
METHODOLOGY

We surveyed the 1,600 people that stated they had travelled by air within past 24 months. Travellers from four countries surveyed—Nigeria, Egypt, Kenya, and South Africa—were 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

- Nigeria: 35%
- Kenya: 15%
- South Africa: 13%
- Egypt: 27%
WHAT PREVENTS AFRICAN CITIZENS FROM TRAVELLING MORE

- Too expensive
- Difficulties booking
- Flight routes too complicated
- Lack of routes
- Difficulty getting visas
- No desire to travel
- Travel experience stressful
- Don't feel safe
WHAT PREVENTS AFRICAN CITIZENS FROM TRAVELLING MORE

All but one within an airline’s control

- Too Expensive
- Safe
- Don't Feel
- Travel
- No Desire to Travel
- Difficulties
- Booking
- Stressful
- Travel Experience
- Lack of Routes
- Getting Visas
- The Flight Routes Are Too Complicated
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.

TODAY

$1149
Annual travel spend per person

24%
Increase in travel spend annually

AFTER INTRODUCTION OF PAN-AFRICAN PASSPORT

$1508
Annual travel spend per person
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

<table>
<thead>
<tr>
<th>Country</th>
<th>Current Spend per Traveller on Ancillaries</th>
<th>Potential Spend per Traveller on Ancillaries</th>
</tr>
</thead>
<tbody>
<tr>
<td>Egypt</td>
<td>$90</td>
<td>$104</td>
</tr>
<tr>
<td>South Africa</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Nigeria</td>
<td>$99</td>
<td>$113</td>
</tr>
<tr>
<td>Kenya</td>
<td>$87</td>
<td>$101</td>
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<tr>
<td>Egypt</td>
<td>$81</td>
<td>$89</td>
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</tbody>
</table>

- **Spent on last trip**
- **Willing to spend**

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MANY TRAVELLERS WILL SPEND SIGNIFICANTLY ON AIR EXTRAS

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

- 16% are not willing to spend anything on air travel extras
- 34% that will spend more than $100
- 26% will spend $51-100
- 23% will spend $1-50
- 16% will spend $0

84% are willing to spend money on extras, including 34% that will spend more than $100.
WHAT THEY WOULD SPEND MONEY ON

The popularity of each ancillary varies between countries

<table>
<thead>
<tr>
<th>Overall</th>
<th>Nigeria</th>
<th>Kenya</th>
<th>South Africa</th>
<th>Egypt</th>
</tr>
</thead>
<tbody>
<tr>
<td>WI-FI</td>
<td>On-board food and beverage</td>
<td>Inflight Wi-Fi</td>
<td>Inflight Wi-Fi</td>
<td>Inflight Wi-Fi</td>
</tr>
<tr>
<td></td>
<td>Inflight Wi-Fi</td>
<td>Fast track security screening</td>
<td>Extra checked luggage</td>
<td>On-board food and beverage</td>
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<tr>
<td></td>
<td>On-board food and beverage</td>
<td>In-flight entertainment</td>
<td>On-board food and beverage</td>
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<td></td>
<td>Travel insurance</td>
<td>Travel insurance</td>
<td>In-flight entertainment</td>
<td>On-board food and beverage</td>
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<tr>
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<td>Travel insurance</td>
<td>Preferred seating / extra legroom</td>
<td>In-flight entertainment</td>
<td>Travel insurance</td>
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<td></td>
<td>In-flight entertainment</td>
<td></td>
<td>Travel insurance</td>
<td>Travel insurance</td>
</tr>
</tbody>
</table>

Most popular
HOW AIRLINES CAN REACH THOSE SEARCHING FOR TRAVEL

When shopping and booking travel, inspiration comes from many sources

- BROWSING WEBSITES: 51%
- TALKING TO FRIENDS & FAMILY: 21%
- SOCIAL MEDIA: 19%
- READING TRAVEL BOOKS: 15%
- GOING TO A TRAVEL AGENCY: 14%
- AIRLINE OR HOTEL APP: 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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