

THE AFRICAN TRAVELLER REPORT 2019

PAIN POINTS, PREFERENCES AND ASPIRATIONS OF
THE AFRICAN TRAVELLER

November 2019

METHODOLOGY



5,869 people answered our screening question –
when was the last time you travelled by air?

We surveyed the 1,500 people that stated they had
travelled by air within the past 24 months

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

Commissioned by Sabre
Surveys taken via mobile phones
October 2019

OPPORTUNITY TO TAP INTO AN EVER-INCREASING APPETITIE TO TRAVEL

Main findings from our report

- | Air travel remains inaccessible to the majority of African citizens – only 26% have travelled by plane in the past 24 months
- | Our survey indicates that air travel has increased by just 2% in the three years since our 2016 survey
- | Travellers showed a significant increase in their willingness to travel since our 2016 report
- | Almost half of travellers are willing to spend more than \$100 on ancillary services that improve their journeys – indicating a significant retail opportunity for African airlines

“The appetite for travel has increased significantly since our 2016 study, yet actual air travel journeys have only very slightly grown. This highlights the extent of the opportunity for African carriers, if they are able to break down barriers to travel and help travellers to find their cheapest or most suitable fares.”

Dino Gelmetti, VP EMEA, Airline Solutions, Sabre

TRAVEL REMAINS INACCESSIBLE TO THE MAJORITY

26% of Africans have travelled by air in the past 24 months



Nigeria | **21%**

Kenya | **29%**

South Africa | **27%**

WHAT PREVENTS AFRICAN CITIZENS FROM TRAVELLING MORE



WHAT PREVENTS AFRICAN CITIZENS FROM TRAVELLING MORE

All but one of these reasons are within an airline's control



BIGGEST PAIN POINTS FOR AFRICAN TRAVELLERS

People don't enjoy time spent waiting, and many experience a lack of entertainment on their journeys



PAIN POINTS AT CHECK-IN

Travellers are frustrated with waiting times and the overall experience of checking in

46%



Queues at check-in are too long

46%



The whole process takes too long

24%



The procedure is confusing for passengers

17%



I find the check-in process intimidating

AFRICA: A TRAVEL GROWTH OPPORTUNITY

If they were able to travel more freely within the continent, respondents said they would be willing to spend 27 percent more on travel – and one-two extra trips per year.



WHERE THAT EXTRA SPEND IS LIKELY TO BE SEEN

This is where travellers would go if they could move within the continent more freely



Nigeria

1. South Africa
2. Ghana
3. Ethiopia
4. Algeria



Kenya

1. South Africa
2. Seychelles
3. Madagascar
4. Mauritius & Ethiopia



South Africa

1. Mauritius
2. Botswana
3. Madagascar
4. Kenya

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



Nigeria



Cheaper tickets



Greater comfort on board



Latest technology



Superior customer service



Kenya



Cheaper tickets



Greater comfort on board



Latest technology



Pride in my country



South Africa



Cheaper tickets



Greater comfort on board



Latest technology



Superior customer service

TRAVELLERS WILLING TO SPEND MORE ON ANCILLARY SERVICES

They would spend \$25 more per journey if they received offers that were tailored to them – a significant retail opportunity for airlines

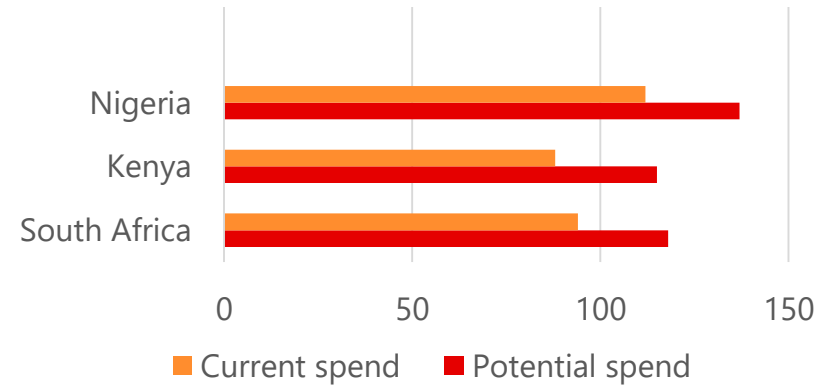


Current spend
per traveller on
ancillaries

Potential spend
per traveller on
ancillaries

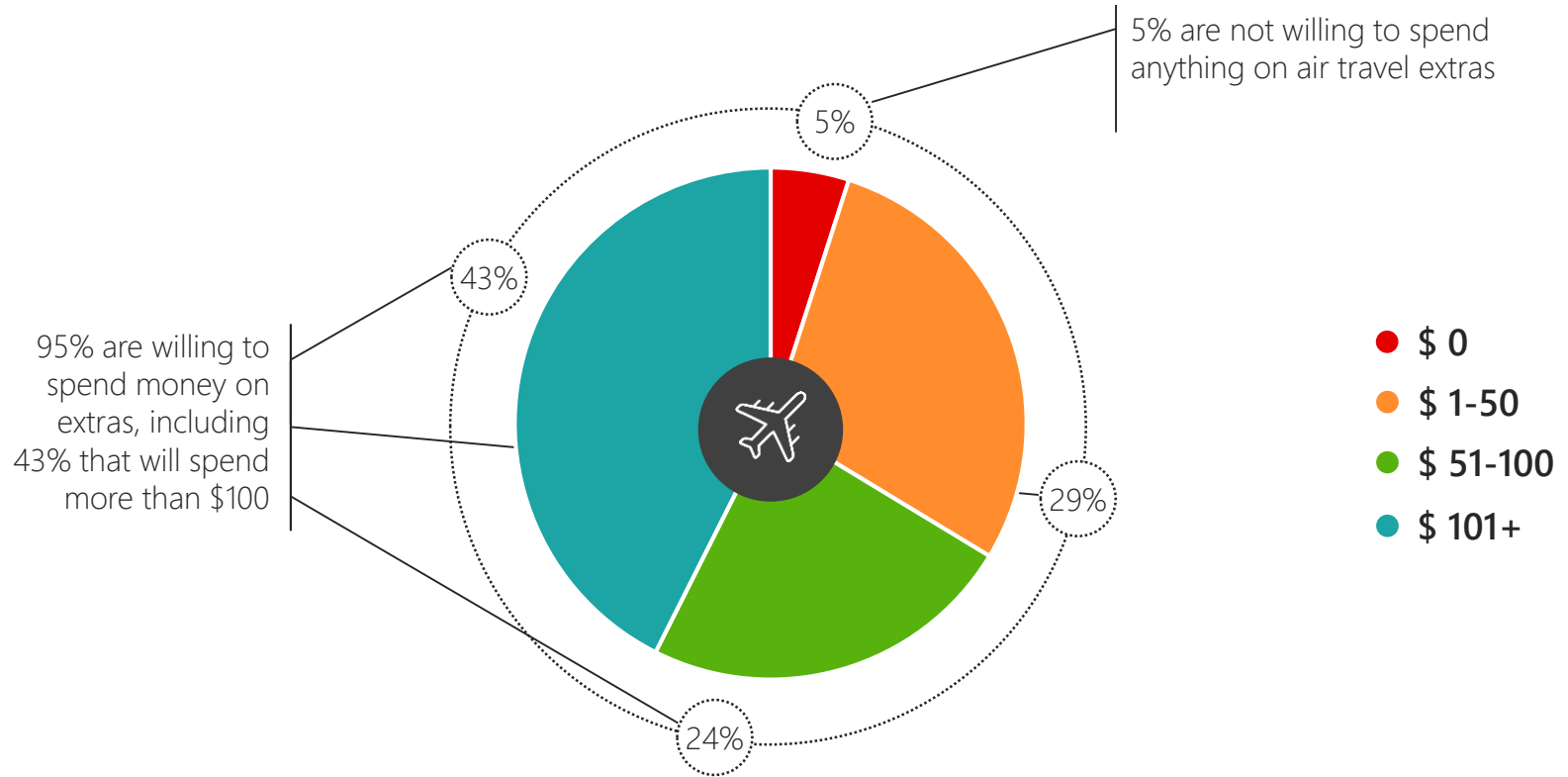


Regional breakdown



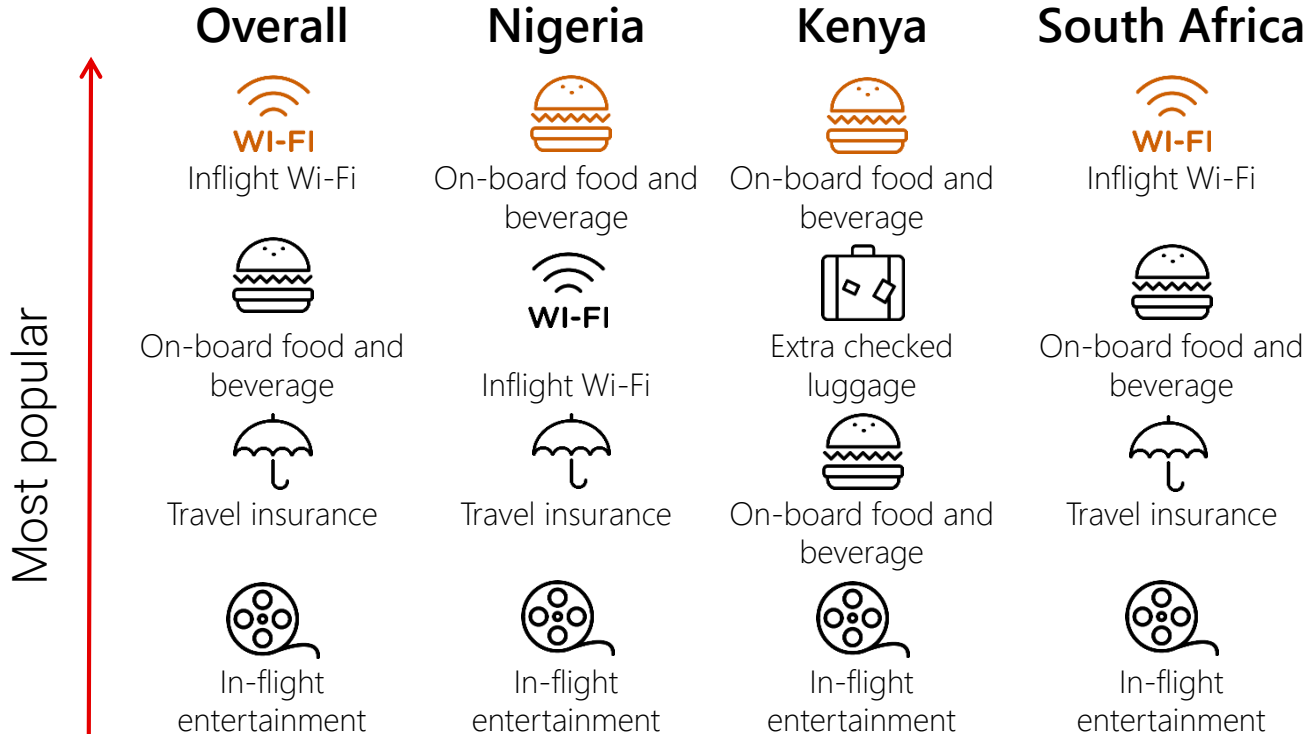
WILLINGNESS TO SPEND ON AIR EXTRAS IS HIGH... AND INCREASING

95% are willing to spend on ancillaries - and 43% would spend more than \$100... a 26% increase since 2016



WHAT THEY WOULD SPEND MONEY ON

The popularity of each ancillary varies between countries – but there are many extra services airlines can offer their passengers



HOW AIRLINES CAN REACH THOSE SEARCHING FOR TRAVEL

When shopping and booking travel, inspiration comes from many sources



65%



28%



36%



17%



17%



13%

AIRLINES NEED TO CONSIDER ONLINE AND OFFLINE CHANNELS

The majority of travellers book online, but many still value the expertise of physical travel agencies



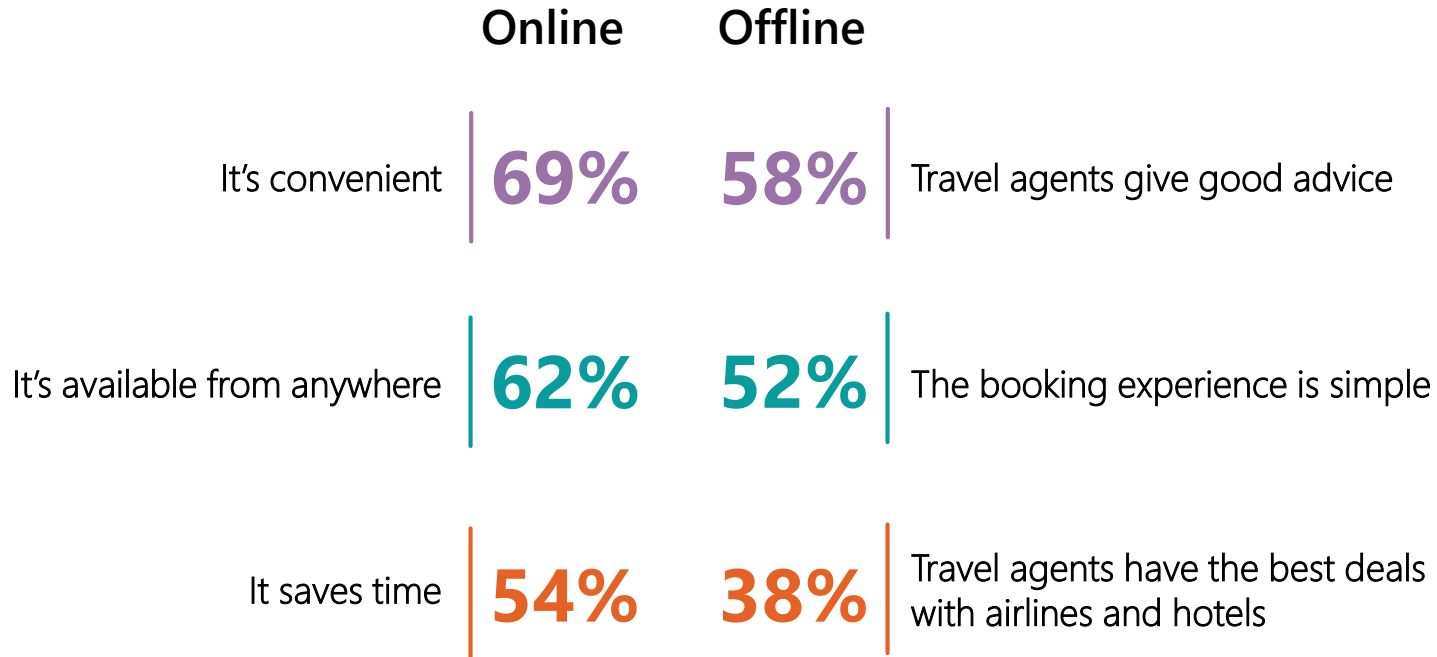
69%



26%

ONLINE AND OFFLINE CHANNELS FULFIL CUSTOMER NEEDS

Travellers like the convenience of online booking, but value the advice and peace of mind of booking through a physical agent



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

Expand your reach – Capture both leisure and business travellers by making content available through Sabre's Travel Marketplace

Leapfrog foreign carriers by operating digitally – invest in the latest digital technology to help address traveller pain points and improve the travel experience

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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