

# The South African Digital Traveler Research

November 2017



# Introduction



## CEO foreword

Travelport's Global Traveler survey is rich with insights and stories about the modern traveler.

The findings demonstrate the significance of digital tools for travelers before, during and even after their journeys. They highlight the need for our \$7.6 trillion global travel and hospitality industry to adapt continually to provide responsive, relevant and timely services for customers.

Whether young or old, and in whichever continent, providing such digital tools and content is no longer an accessory but an essential means of reaching and engaging with the modern traveler from the moment they search to the moment they return from their trip.

Travelport's platform stands ready to provide the industry with the means to do this. As a technology company and a world leader in digital and mobile capabilities, we aim to make the experience of selling, buying and managing travel continually better.

We invest over \$200m a year in Research and Development to do this and we will use the insights in this survey to continue targeting this investment to help our customers meet the needs of the modern traveler.

I hope you will find the insights from this survey useful in guiding your strategy and priorities as our industry continues to evolve and adapt to the new opportunities the latest technology can provide.

**Gordon Wilson**  
President and CEO, Travelport

## The digital traveler league table 2017

By combining the main indicators of digital usage by travelers in each country, we have created a league table to show who are the most and the least digitally-dependent among the nations surveyed. The findings reflect overall smartphone, fixed-line and mobile internet penetration levels locally.

There are some striking differences in digital travel behavior between the countries in the survey. Some people are heavily reliant on mobile technology while others are less digitally dependent when planning and making their journeys.

Rank	Country
1	India
2	China
3	Indonesia
4	Brazil
5	Saudi Arabia
6	Mexico
7	South Africa
8	UAE
9	Colombia
10	Italy
11	US
12	Spain
13	France
14	Russia
15	Canada
16	Australia
17	UK
18	Japan
19	Germany

# South Africa statistics

## Planning



**86%** use travel booking sites to help them discover new and exciting destinations

**82%** use review sites for researching their trips



**75%** use videos and photos posted by friends as part of their travel research

## Booking



**93%** are looking for value for money when choosing an airline



**79%** choose hotels that don't charge for Wi-Fi

**54%** leisure travelers worry that online reviews are not genuine



## The journey



**86%** say that staying in touch when traveling is important



**79%** say digital boarding passes and e-tickets make traveling much easier



**69%** believe a good digital experience is important when choosing an airline



## In destination



**45%** want to escape the digital world and switch off all devices



**64%** try to see local attractions while on business trips



**43%** want to share travel experiences on social media



**17** different categories of apps are used on average when traveling



Travelport's 'The Global Digital Traveler Research' was an online survey utilizing Toluna Research's\* sample of travelers in August 2017. The research covered 19 countries globally and was restricted to people who had taken at least one return flight last year. In total, there were 11,000 respondents from the 19 countries.

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\*Toluna Research: [www.toluna-group.com](http://www.toluna-group.com)

# Global view

## Report themes

### Digital pain relief for travelers

There are thousands of online apps available to help with planning and enjoying a trip. But is there too much information at hand? Can it become confusing rather than helping travelers make better decisions?

### The ever-connected traveler

Everyone likes to relax on holiday. But how does that work when you travel with the internet in your pocket, knowing that you can still be contacted wherever you are? Is there a conflict between being connected and getting away from it all?

### Age and youth - doing things differently

Different people enjoy different types of travel - that's not news. But is there a gap between the habits of older and younger travelers when it comes to researching and booking a trip?

### The digital traveler league table

By combining the main indicators of digital usage by travelers in each country, we have created a league table to show who are the most and the least digitally-dependent among the nations surveyed. The findings reflect overall smartphone, fixed-line and mobile internet penetration levels locally.

## Digital pain relief for travelers

### The age of the digital traveler

In recent years, the number of travel-related smartphone apps has increased hugely. There are apps to help you perform hundreds of tasks to help you on your trip, from researching a destination to printing a boarding pass. On average, travelers access 16 categories of apps for every journey they take. But is there too much information at hand?

### A world of choice

With all this information at their fingertips, you would expect travelers to be confident, however they have told us that the amount of information available is overwhelming, and can lead to confusion and indecision.

On average, travelers use **16** different categories of apps for a trip

**75%** leave reviews of their travels on review websites

### A question of choice

Review sites are all very well, but the people writing the reviews may not have the same taste as you. And of course, not all reviews are genuine, so it can be difficult to know whom to trust.

### Coming full circle

What travelers are increasingly looking for in this confusion is a trusted voice. A travel professional who knows them and can guide them through the maze of choices and curated offers that they know will interest them. They would love a single source for all the information and help they need.

## The ever-connected traveler

### Staying connected

There are many reasons for needing online access when away from home. Travelers may want to research their destination and its attractions, or simply check the weather report for the next day. They may also want to stay in touch with friends and family at home,



post online messages and photos of their activities, new friends and exotic meals.

### Fear of missing out

Unsurprisingly then, travelers see it as essential that they are able to connect to the internet while traveling, with free Wi-Fi being seen as a basic need. They feel they would be lost without their smartphones and worry about technology failing or batteries running out of charge.

**60%** said they would be lost without their smartphone

**61%** avoid hotels that charge for Wi-Fi

# Global view

## Switching off

Connecting with friends and family, accessing social media and researching the local area are all highly desirable, but there is still an underlying need to disconnect from time to time so travelers can really relax by the pool and forget real life for a while.

## Age and youth – doing things differently

### The wisdom of age

Older travelers tend to know in advance what they are looking for when they research a trip. They like to go back to tried and tested travel plans and spend less time searching for inspiration. They are also less likely to be influenced by social media, and will happily book a trip based on what they have done before.

### Youthful indecision

Younger travelers, however, seem to be much more dependent on help and advice from others. They use social media and review websites to research holiday ideas and say that they are influenced by



them. However, this can prove to be confusing, as many of them reported feeling overwhelmed by the information and unsure of who they could trust.

### The voice of experience

Young travelers realize that sometimes, less is more. If they can get expert advice from one source, there is no need to

**79%** of 18-24 year-olds check out videos and photos posted by friends on social media as part of their research

**44%** of 18-24 year-olds were concerned they didn't know if reviews were genuine

spend so much time researching on multiple sites. What would really help is a simplified process with a travel professional supplying personalized advice. Then they would feel comfortable that they were making the right decisions for them.

## The digital traveler league table

As a result of reviewing digital usage of each country we surveyed, we have been able to create a league table to illustrate the nations that are the most digitally-dependent in the world. Interestingly, there are some distinct differences in the digital travel behavior of these countries.

### Top of the league: India

Most of us would feel lost without our smartphones, though we might not use them for all the phases of a trip, but the Indians are the world champions of digital travel. They clearly love the convenience of their smartphones and use them often, from booking a trip to boarding a plane with a digital boarding pass.



### Voice search growing in usage

Voice search is still very much an emerging technology, although one that is fast becoming a popular source of information. Researching travel by voice search is hugely popular in China with 72% using it, whereas only 33% of travelers in UK are using this medium.

Indian travelers use smartphones from booking a trip to boarding a plane with **82%** agreeing that using boarding passes makes traveling easier

China topped the charts for being the biggest app users with an average of **20** categories of apps used during each trip

# Country view: South Africa

## Report themes - South Africa

Review sites - popular but not always trusted

The digital experience

Always connected

South African business traveler

**54%** of leisure travelers worry that online reviews are not genuine

**70%** of over 55s have left online reviews whilst traveling

**63%** of over-55s rely on their smartphone when traveling

**35%** book their trips using smartphones

**17** different categories of apps are used on average when traveling

**82%** use review sites to research a trip

## Review sites - popular but not always trusted

South African travelers are enthusiastic researchers, using travel booking sites (86%) to help them discover new and exciting destinations. They also consult review sites (82%) to give them further information about things to see and do while traveling and these have the greatest influence on their choices, although 54% of leisure travelers worry that the reviews might not be genuine.

Given the importance of review sites for the South African traveler, it is not surprising that 74% of leisure travelers and 77% of business travelers leave hotel and restaurant reviews. The over-55s are great contributors and leave reviews while they are traveling (70%).

In line with global trends, the South African traveler mostly books using a computer (85%), however, a large group book using a smartphone (35%) or tablet (38%). Whilst online bookings are widely used, 41% of leisure travelers dislike not being able to talk to a human when booking a trip.



## The digital experience

South African travelers are digitally confident and believe a good digital experience is important (69%) to support their choice of airline. 78% say digital boarding passes and e-tickets make traveling much easier.

On average, South African travelers use 17 different categories of apps when traveling, the most popular being banking and maps, followed by social media.

Households with PC **25.5%\***  
Households with smartphone **61.3%\***

\*Euromonitor International (2016 - national statistics)

# Country view: South Africa



## Always connected

86% say that the most important aspect of technology when traveling is being able to stay in touch, which is probably why 79% choose hotels that don't charge for Wi-Fi. However not everyone wants to be online and available all the time, and 45% of travelers say they want to escape the digital world and switch off all devices. This is in contrast to their desire to want to share travel experiences on social media (43%).

### Hotel choice

Once the key factors such as location and cost are decided upon, the South African traveler looks to review sites to help guide his or her choice of hotel. 79% feel that free Wi-Fi is an important factor, which is no surprise given how much they enjoy using technology.

The frequent traveler is even more demanding when it comes to in-room technology such as smart TV, digital music player etc. with 62%

**79%** choose hotels that don't charge for Wi-Fi

**54%** of business travelers try to add on a few extra days for leisure

Biggest pain point for business travelers is having to book everything separately **56%**



(versus 41% for infrequent travelers) claiming that it is important when choosing a hotel.

## South African business traveler

The South African business traveler is keen to see as much of the local area as possible (69%) so it's no surprise that 54% try to add on a few extra days to make the most of the opportunity. Traveling for business also offers a

chance to switch off from home responsibilities and 46% appreciate the time on their own away from their families. They want to know what local attractions are available (69%) but tend to buy tickets for these once in destination (28%).

When asked, South African business travelers felt that one of the biggest pain points was having to book everything separately such as flights, accommodation and ground transportation (56%).

# Our reports

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Colombia	South Africa
France	Spain
Germany	UAE
India	UK
Indonesia	US
Italy	

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\*Toluna Research: [www.toluna-group.com](http://www.toluna-group.com)

