

The Indonesian 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

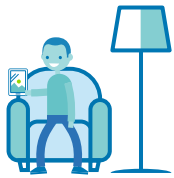
By combining the main indicators of digital usage by travelers in each country, we have created a league table to show who are the most and the least digitally-dependent among the nations surveyed. The findings reflect overall smartphone, fixed-line and mobile internet penetration levels locally.

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

Indonesia statistics

Planning



71% use voice search when researching their trip

93% use videos and photos posted by friends as part of their travel research



77% believe a good digital experience is important when choosing an airline

Booking



63% avoid hotels that charge for Wi-Fi

68% of travelers book their trip on a smartphone



45% find it frustrating that they can't access their booking on all of their devices



The journey



84% say that being able to stay in touch is most important to them when traveling

80% say digital boarding passes and e-tickets make traveling much easier



25% rely on their smartphones for the entire journey



In destination



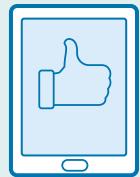
64% of business travelers want concierge services on their smartphone



57% prefer to check in to a hotel via an app



80% have written hotel/restaurant reviews



19 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

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

Regional view: Asia Pacific

Report themes – Asia Pacific

The Asia Pacific digital traveler
– top of the global league

The connected traveler

The Asia Pacific digital traveler – top of the global league

Asia Pacific travelers are top of the global league with India, China and Indonesia in the top three. While researching, the majority of Asia Pacific business (82%) and leisure travelers (71%) use social media photos and videos from friends and travel brands. Almost half of them (46%) have booked a trip using their mobile, so they all seem comfortable with technology.

Digital trust dilemma

With such a wide range of information to consider from many different sources, Asia Pacific travelers feel more confused and frustrated than ever before. It's no

surprise they turn to peer to peer sites (82%) as their first port of call.

The majority of Asia Pacific travelers (80%) consult with travel professionals to help with the planning. Chinese travelers (88%) turn to these professionals as the first point of call to handle booking and travel arrangements. This preference for a human interface may be due to the type of holiday they take, or it may simply be that they feel more secure with a professional to help them with different languages and cultures.

Voice search – ask my electronic assistant

China and Indonesia have a fast adoption of this new media and have high usage rates already. By the end of 2016, China already had around 43 million such digital assistants in use according to Ovum*. It is however, the least influential of all the sources for Asia Pacific travelers overall, which is understandable for such a recent technology.

Booking the trip – remote or with a human interface

Even though this abundance of sources gives excellent choices and inspires ideas,

there is a downside to all this digital data. Apart from complicated terms and conditions and time spent shopping around, there was a frustration at not being able to talk with a human. This could be an opportunity for a human-like chatbot.

Asia Pacific, apps and anxiety

Asia Pacific travelers use even more apps than are used globally. China topped the charts for app use with an average of nearly 20 categories of apps used for each trip. In Asia Pacific, an average of 18 categories of apps are used with the most popular being maps, banking and social media. On the one hand, while tools like online boarding passes are recognized as making life easier (74%), they also bring anxiety with the worry about having a technology failure when they become reliant on them.

The connected traveler

Indian travelers love their smartphones which they use for booking travel (51%) and for research in destination (49%) as well as post trip (25%). Australians (80%) and Japanese (87%) are more likely to book using a computer than a smartphone.



80% of Asia Pacific travelers consult a travel professional while planning their trip

82% of travelers use peer to peer sites as a source of information

Around **90%** of Chinese, Indians and Indonesians use videos and photos posted by friends to help them

58% of travelers use voice search, a significant amount for new technology

37% feel it is pain point not being able to speak to a human while booking

*Ovum: Digital Assistant and Voice AI-Capable Device Forecast for 2016 to 2021

Country view: Indonesia

Report themes – Indonesia

Indonesia – third in the league

The digital dilemma

Business trips – a chance to get away

Indonesia – third in the league

Indonesia ranks third in the league table of countries surveyed, just behind its Asia Pacific counterparts, India and China, as the most digitally-dependent traveler nations.

Researching is part of the fun

Indonesian travelers conduct more research before a trip than any other travelers in the Asia Pacific region.

Households with PC **20%***

Households with smartphone **23%***

*Euromonitor International (2016 – national statistics)

Their favorite sources are videos and photos posted on social media (93%), although they also consult travel sites (92%), review sites (82%) and travel professionals (84%). They are also one of the region's highest users of voice search (71%). This new technology is clearly well used by Indonesian travelers, but they say it has the least influence on them of all the sources they consult, so it is not yet replacing other media.

The digital dilemma

Indonesian travelers use even more mobile apps than travelers globally (18 categories on average) and, unsurprisingly, videos and social media are the most frequently used (95%), followed by maps. One concern that travelers have is that technology such as online boarding passes are recognized as making life easier (80%), but they can also create anxiety about technology failure when travelers are reliant on them.

Choosing a hotel

As you would expect, Indonesian travelers choose a hotel firstly for the

location (82%), but also base their choice on a good digital experience (54%) and free Wi-Fi (80%).

Any tech problems?

With all this enthusiasm for travel technology, what is the downside for Indonesian travelers? The biggest pain points are the terms and conditions relating to any changes (51%), followed closely by not being able to access their booking on all devices (45%) and the hassle of transfers, flights and accommodation needing to be booked separately (43%). This may be an opportunity for all-in-one packages to ease this discomfort.

Business trips – a chance to get away

Seeing the sights is high on the agenda for Indonesian business travelers. Most of them also say that they appreciate the opportunity to have some time away from their families (83%), so business trips are not seen as simply hard work!



Over **25%** rely on their smartphones throughout the entire trip

On average, **19** categories of apps are used during trips

71% of travelers use voice search when researching a trip

80% of travelers choose hotels with free Wi-Fi

83% of travelers appreciate time away from their family

43% find it frustrating having to book elements of travel separately

Online bookings via mobile at a high of **68%** whereas the region is only **46%**

Our reports

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Australia	Japan
Brazil	Mexico
Canada	Russia
China	Saudi Arabia
Colombia	South Africa
France	Spain
Germany	UAE
India	UK
Indonesia	US
Italy	

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