

# January Snapshot – The Results

Throughout 2021, ATTA will be taking a “snapshot” at the end of each month from the perspective of:

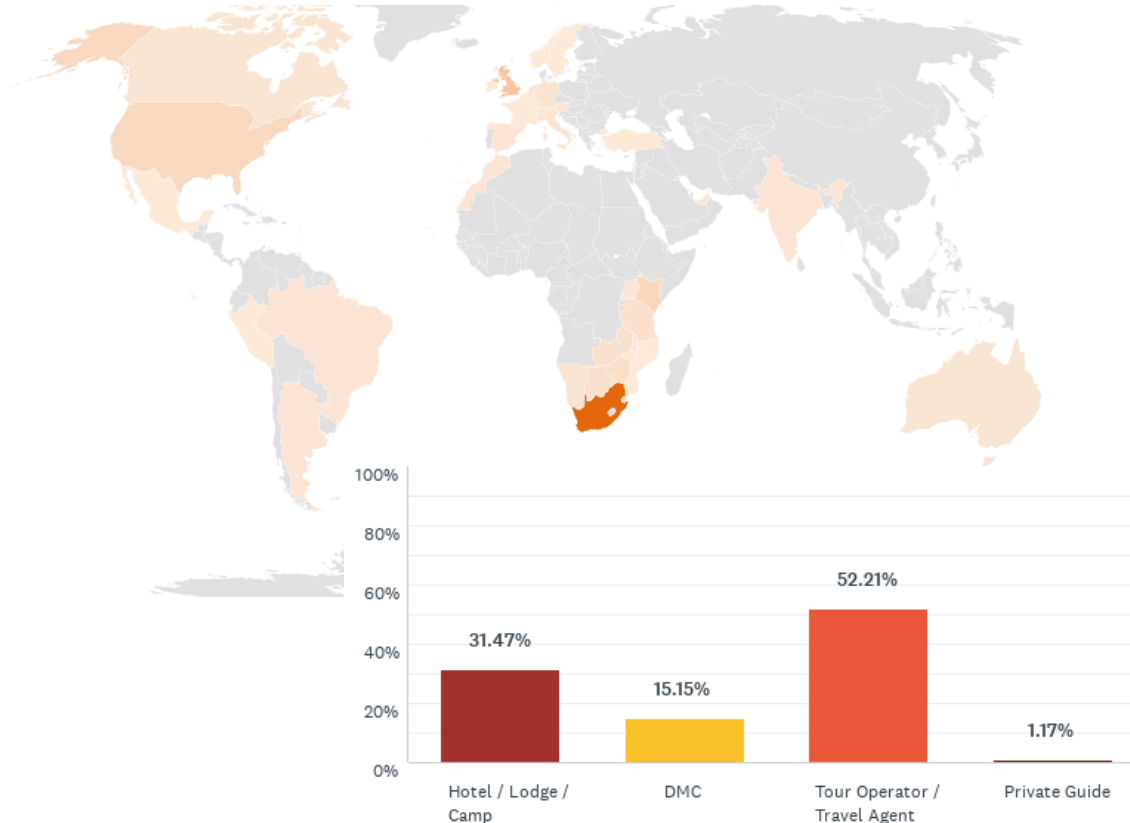
## Accommodation providers | DMCs | Tour Operators

**WHY?** As an indication of what is happening within the broader African Travel & Tourism industry. Over the upcoming 12 months, the results will support identifying patterns as our industry re-starts, however gradually. Focussing on gaining an insight into:

- 🌍 Who is actually travelling each month?
- 🌍 How are they booking?
- 🌍 Where are they enquiring to go to?
- 🌍 What is the lead times of bookings?

**ACTION:** At the end of the survey, we will have 1 action point we can collaboratively address based on the most common concern.

# WHO PARTICIPATED?



## Participating Countries

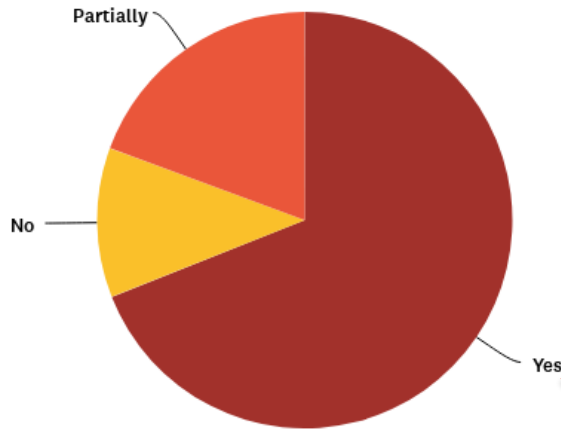
Argentina	Namibia
Australia	Netherlands
Austria	Norway
Belgium	Peru
Botswana	São Tomé e Príncipe
Brasil	Seychelles
Canada	Singapore
France	South Africa
Germany	Spain
India	Sweden
Ireland	Switzerland
Israel	Tanzania
Italy	Turkey
Kenya	UAE
Malawi	Uganda
Mauritius	UK
Mexico	USA
Morocco	Zambia
Mozambique	Zimbabwe



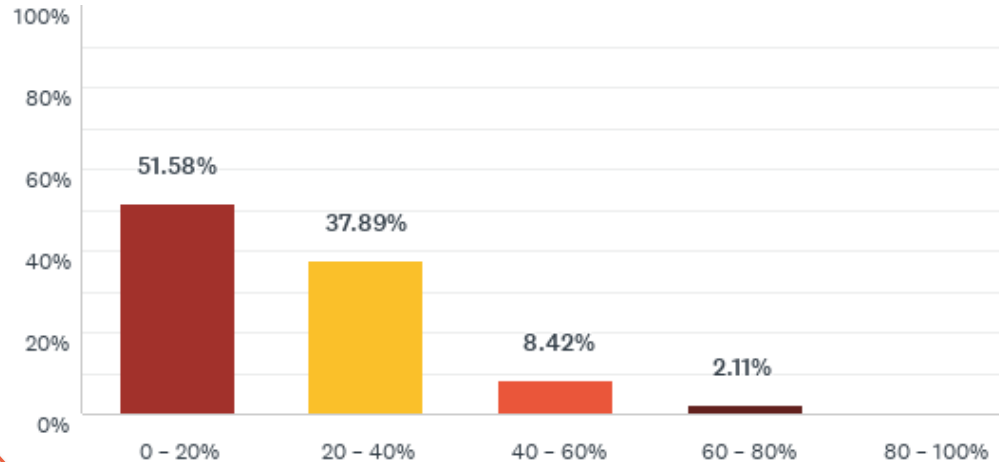
**HOTELS / CAMPS / LODGES  
RESPONSES**

# HOTELS / CAMPS / LODGES

Q1: Were you open in January?

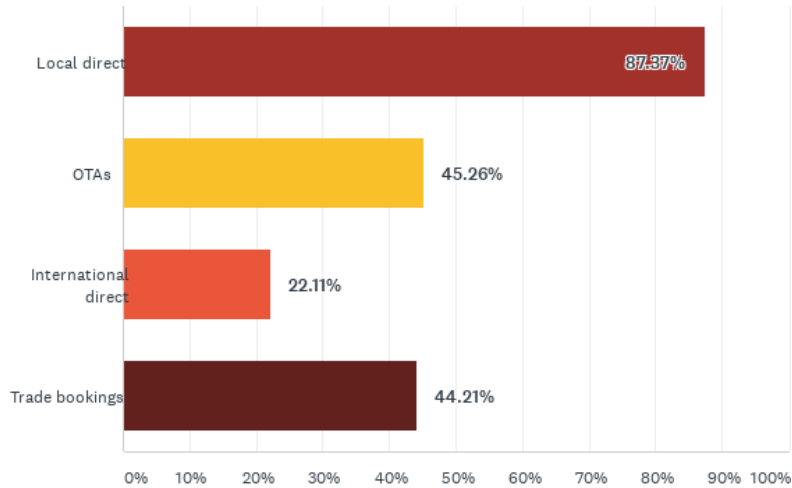


Q2: What was your January occupancy level?



Of those who answered "open" in January, 15% had closed after 2 weeks.

### Q3: For guests arriving in January, which booking channels were used?

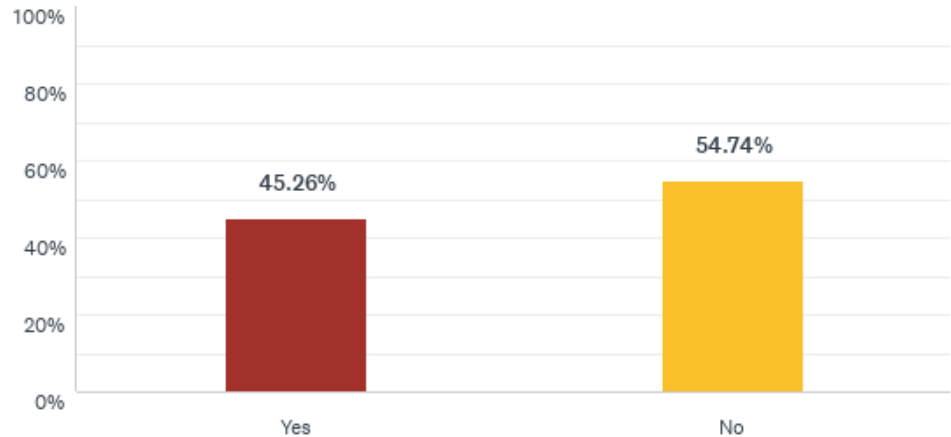


#### NATIONALITIES

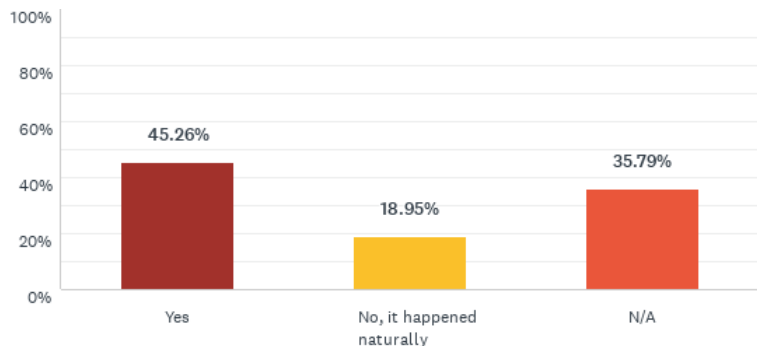
Mainly domestic. International arrivals were from:

- 1. USA
- 2. UK
- 3. Germany
- 4. Russia
- 5. Switzerland
- 6. France

### Q4: Have you seen an increase in local business (Jan arrivals only)?



## Q5: If yes, did you target this business?



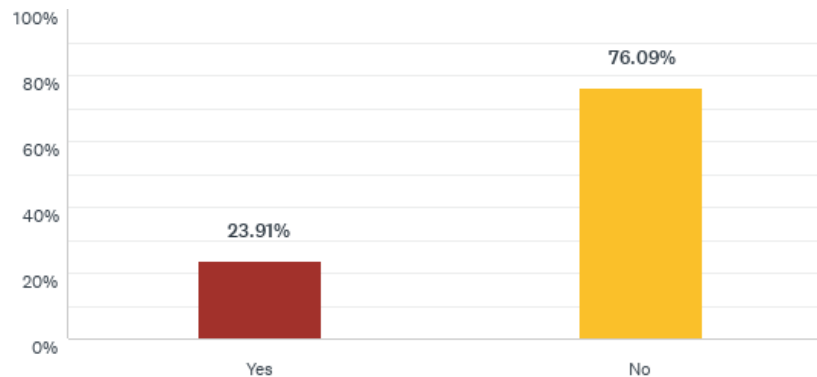
### Q5 Comment

Targeting direct was not always in the marketing strategy of the property. Had to change to attract new business.

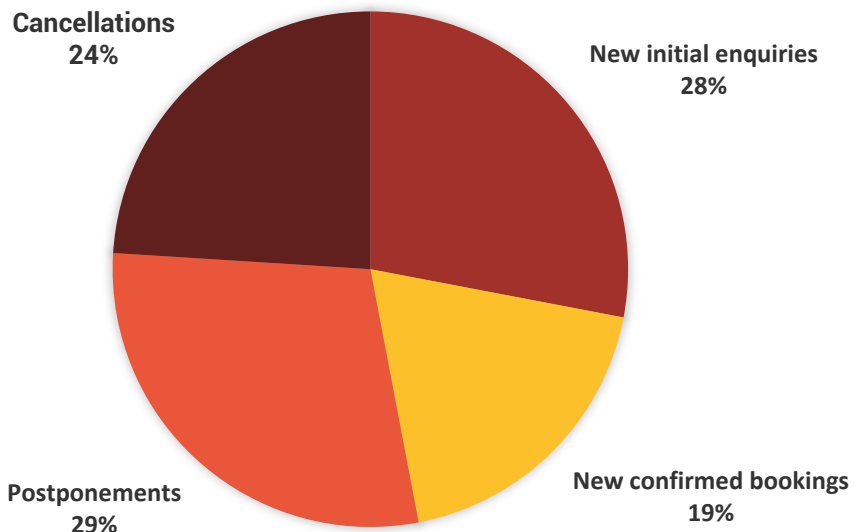
### Q6 Comment

Of those camps that are closed and are not seasonal, 56% plan to re-open by 01 April

## Q6: If no, is your camp / hotel / lodge seasonal?



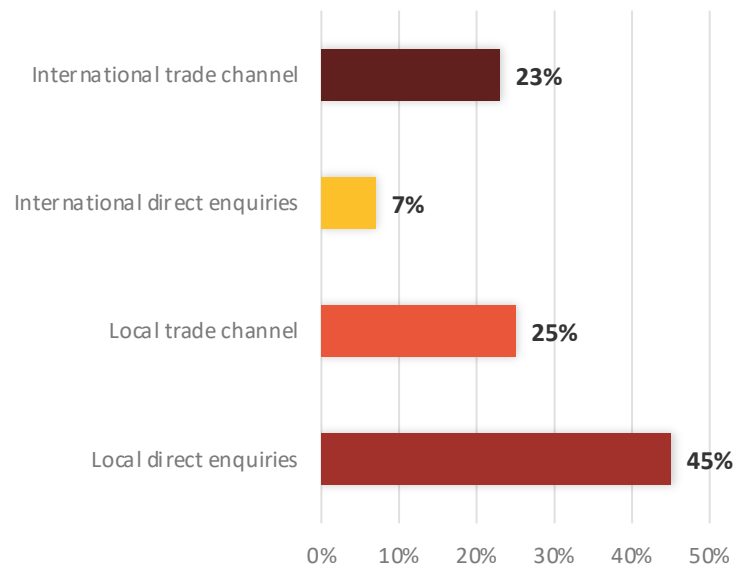
## Q7: % Breakdown of enquiries in January



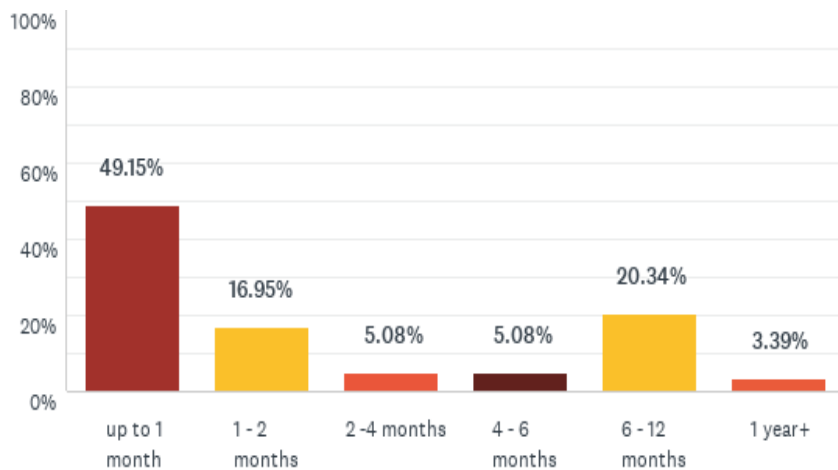
### SUMMARY

- Postponements: 29%
- New Initial Enquiries: 28%
- Cancellations: 24%
- New Confirmed Bookings: 19%

## Q8: % BREAKDOWN OF BOOKING CHANNELS USED



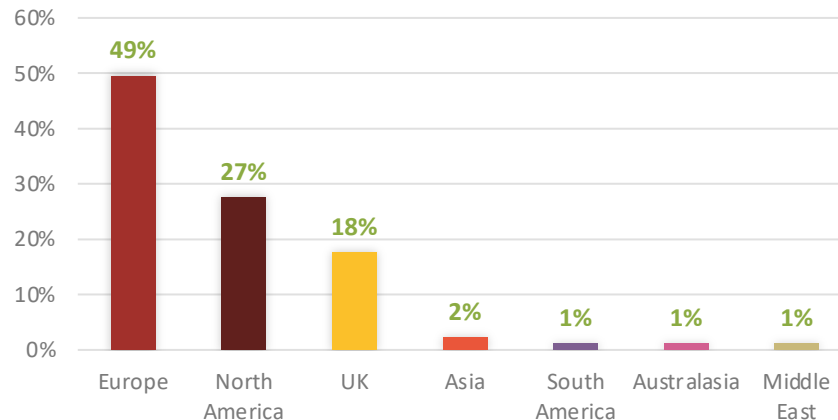
## Q9: Average lead time of confirmed bookings:



### Comments

- Dramatic shortening of lead times, many less than 1 week
- Extremely erratic
- Last minute international guests taking the opportunity when regulations allow

## Q10: From which countries / regions are your new international enquiries originating from?

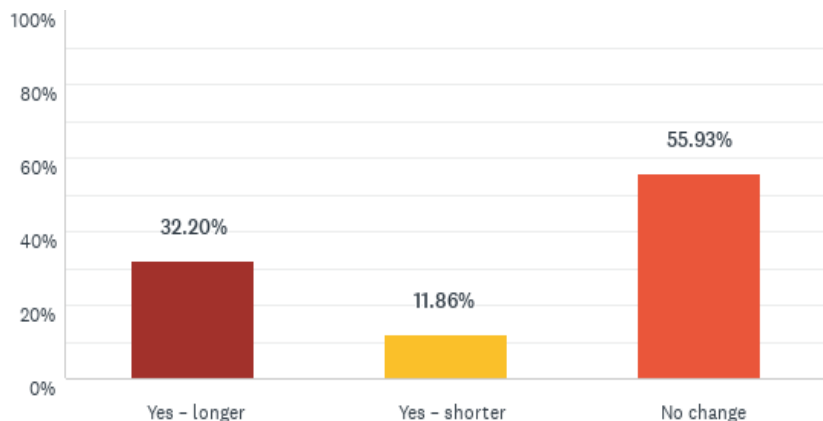


### Top 3 International Countries:

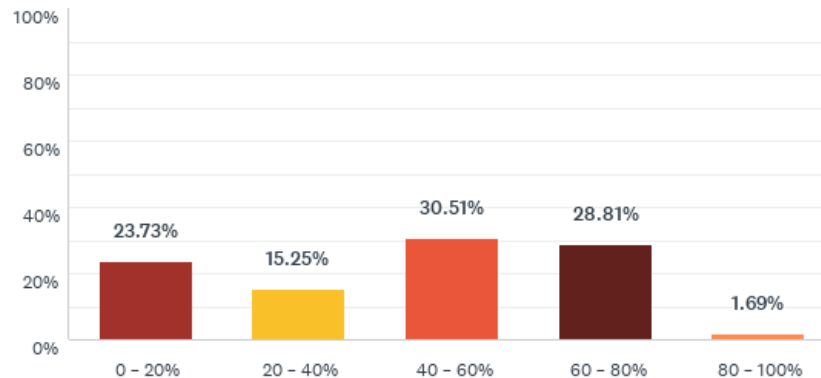
1. USA
2. UK
3. Germany



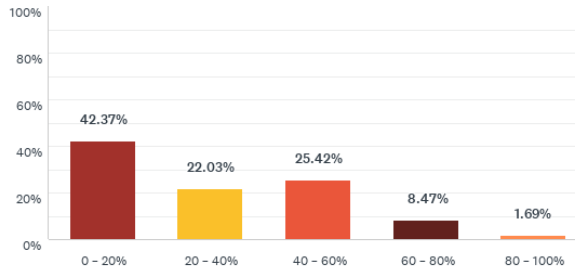
## Q11: With these enquiries & confirmations, have you seen a change in lengths of stays?



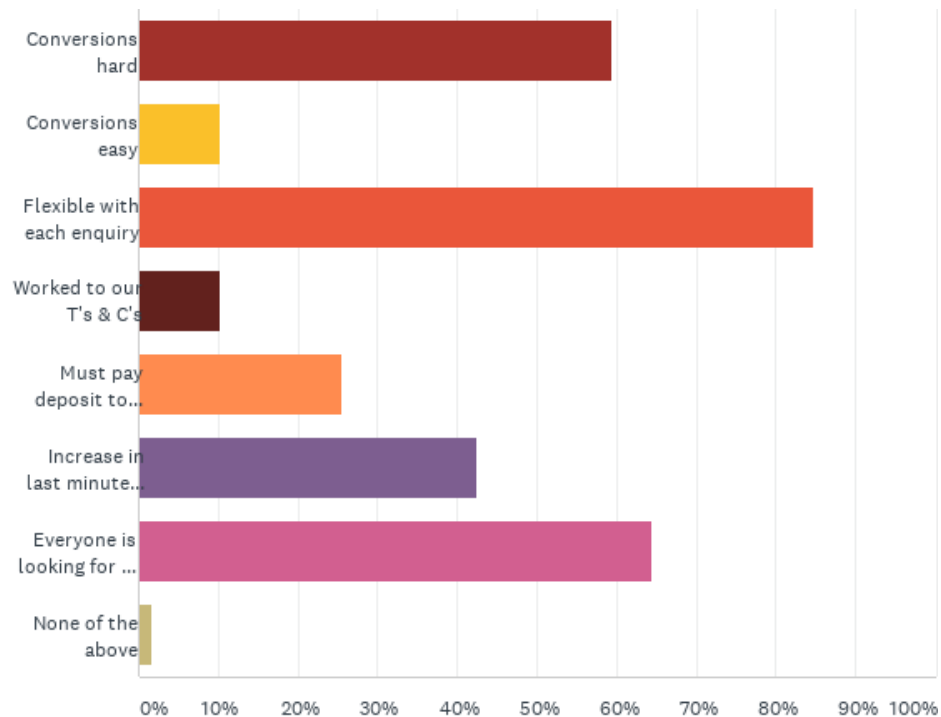
## Q12: FUTURE BOOKINGS - what % are postponements from 2020?



## Q13: Of these, what % have you budgeted to confirm and travel in 2021?



## Q14: Tick those you agree with:



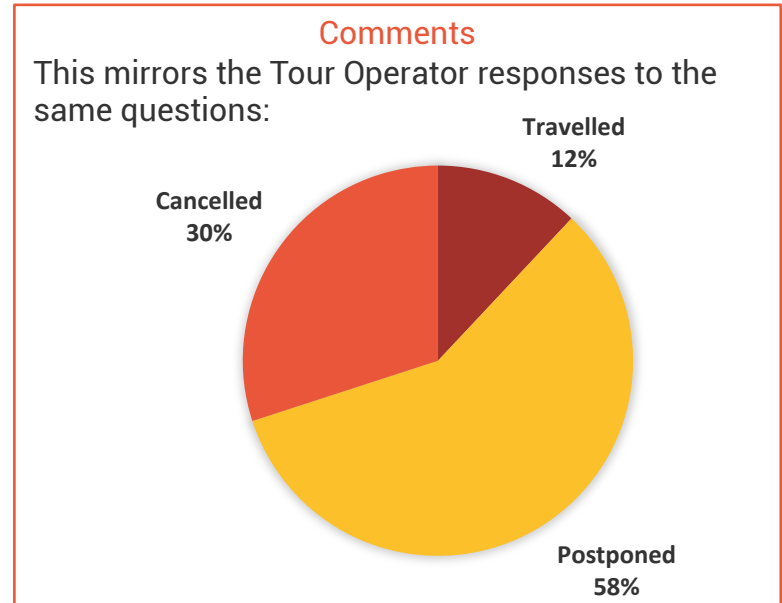
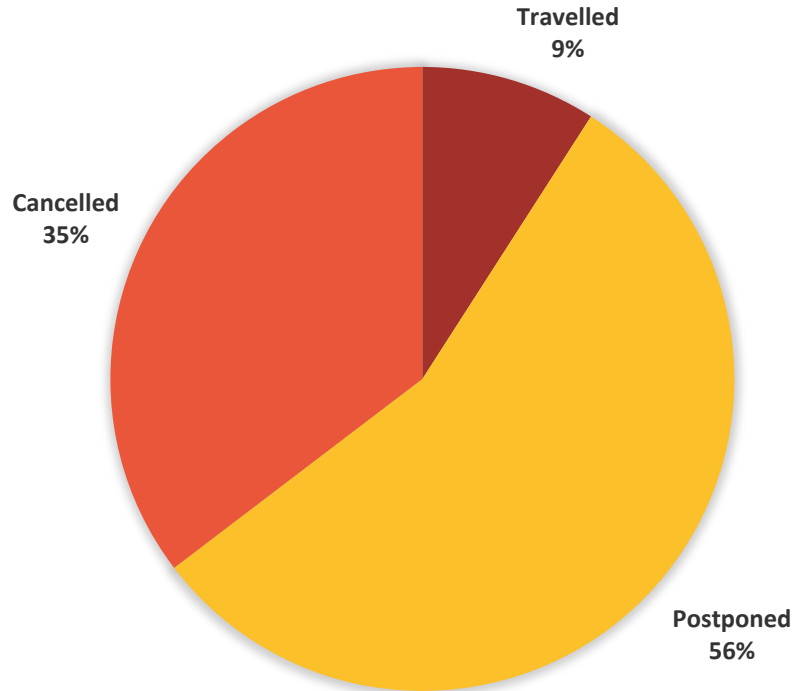
ANSWER CHOICES	RESPONSES
Conversions hard	59.32%
Conversions easy	10.17%
Flexible with each enquiry	84.75%
Worked to our T's & C's	10.17%
Must pay deposit to confirm	25.42%
Increase in last minute business with easy conversion	42.37%
Everyone is looking for a deal	64.41%
None of the above	1.69%

### Additional Comments

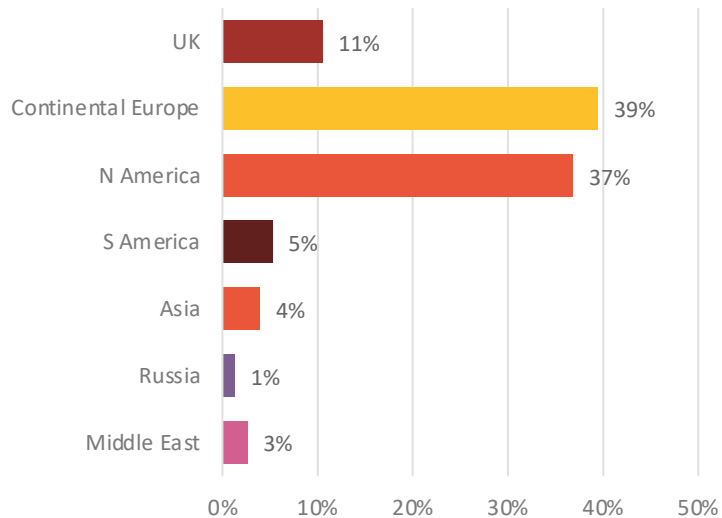
- Deposits taken for local, direct bookings only
- Deposits fully refundable but commitment fee asked to prove intent to travel
- Expectation of travellers is for flexibility and discounts



Q1: From those bookings meant to travel in January, what %.....



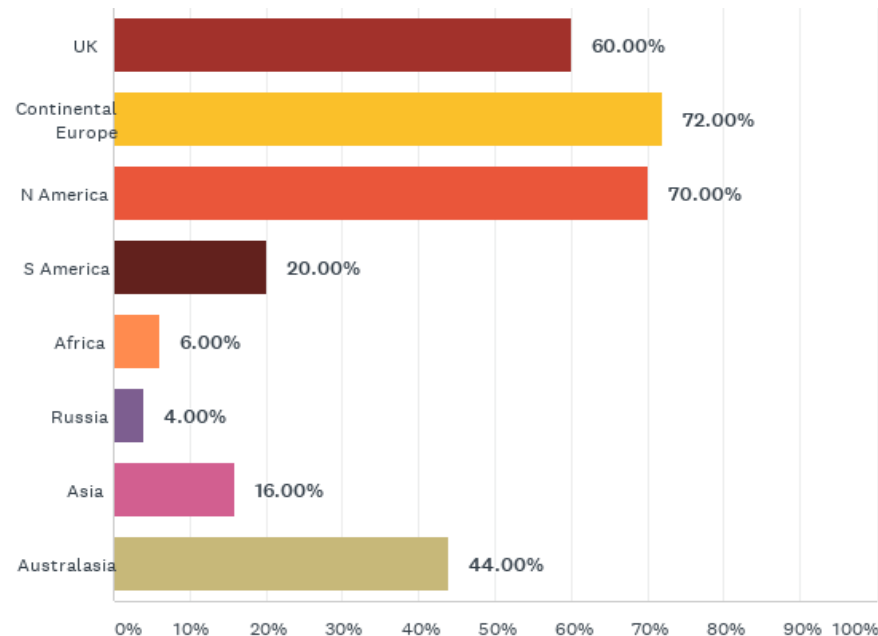
## Q2: Which markets provided enquiries / new bookings in January



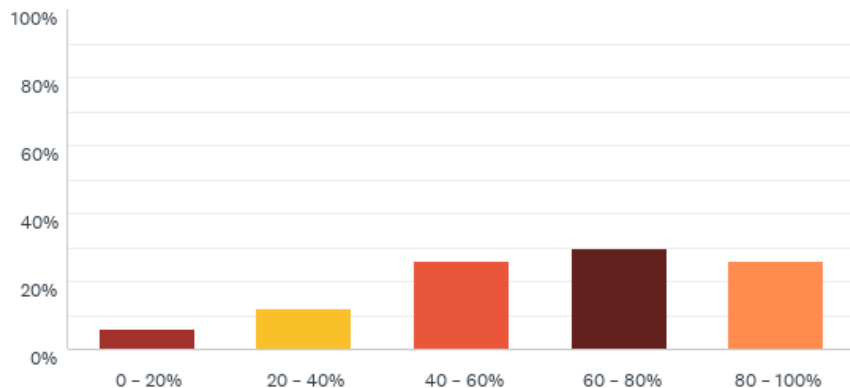
### Comments

- Nearly 25% indicated they received 0 enquiries
- Very little to no business from the local market. Main international markets were:
  1. USA
  2. UK
  3. Germany, whilst Europe as a whole was highlighted

## Q3: Where are your traditional source markets?



## Q4: FUTURE BOOKINGS: What % of your 2021 bookings are postponements from 2020?



### ANSWER CHOICES

0 - 20%

20 - 40%

40 - 60%

60 - 80%

80 - 100%

### RESPONSES

6.00%

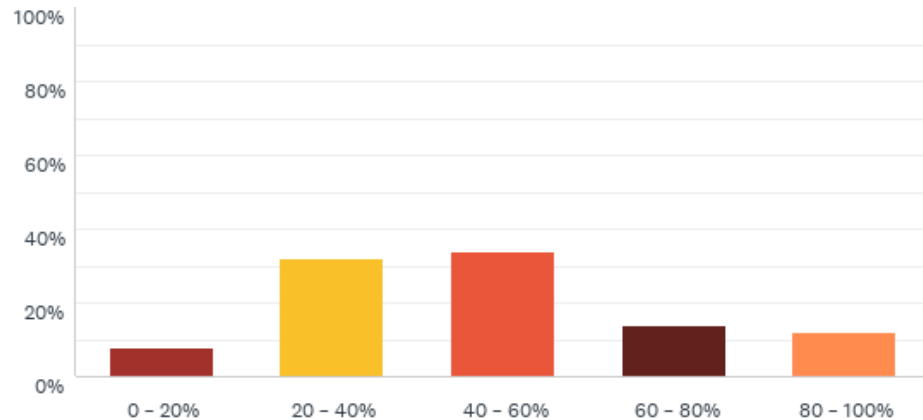
12.00%

26.00%

30.00%

26.00%

## Q5: Of these, what % have you budgeted to confirm and travel in 2021?



### ANSWER CHOICES

0 - 20%

20 - 40%

40 - 60%

60 - 80%

80 - 100%

### RESPONSES

8.00%

32.00%

34.00%

14.00%

12.00%

4

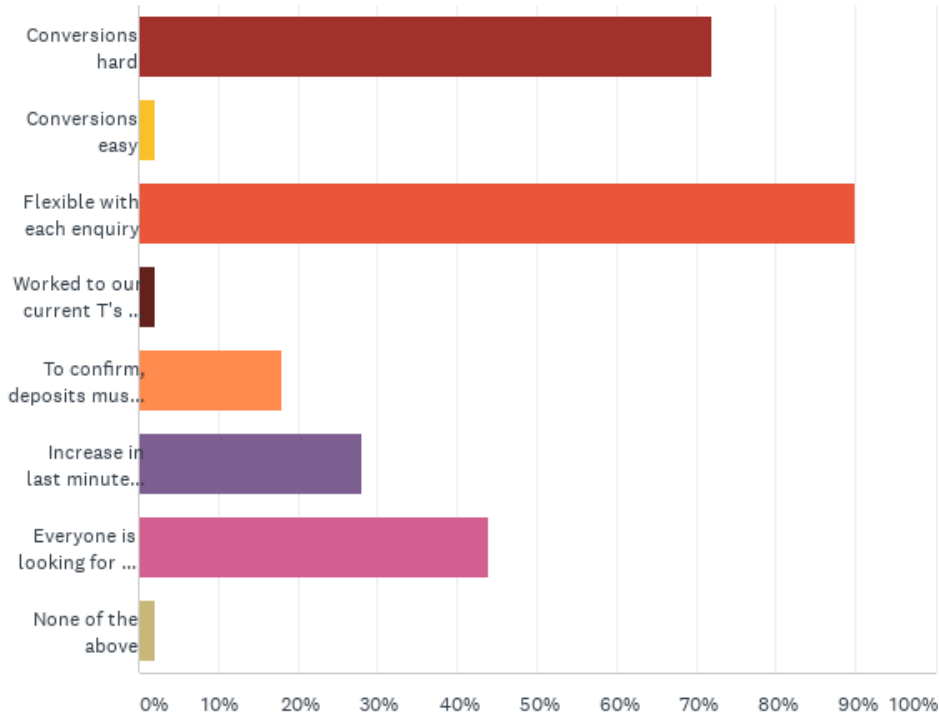
16

17

7

6

## Q6: Tick all comments you agree with in the current climate



ANSWER CHOICES	RESPONSES
Conversions hard	72.00%
Conversions easy	2.00%
Flexible with each enquiry	90.00%
Worked to our current T's & C's	2.00%
To confirm, deposits must be paid	18.00%
Increase in last minute business with easy conversion	28.00%
Everyone is looking for a deal	44.00%
None of the above	2.00%

### Comments

- Flexibility is key
- Non revenue generating administration is keeping the industry busy

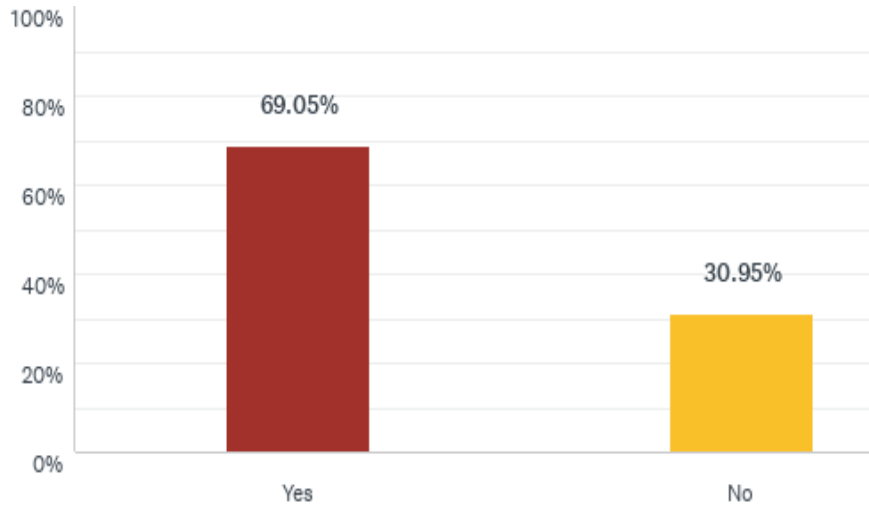


# TOUR OPERATOR & PRIVATE GUIDES RESPONSES

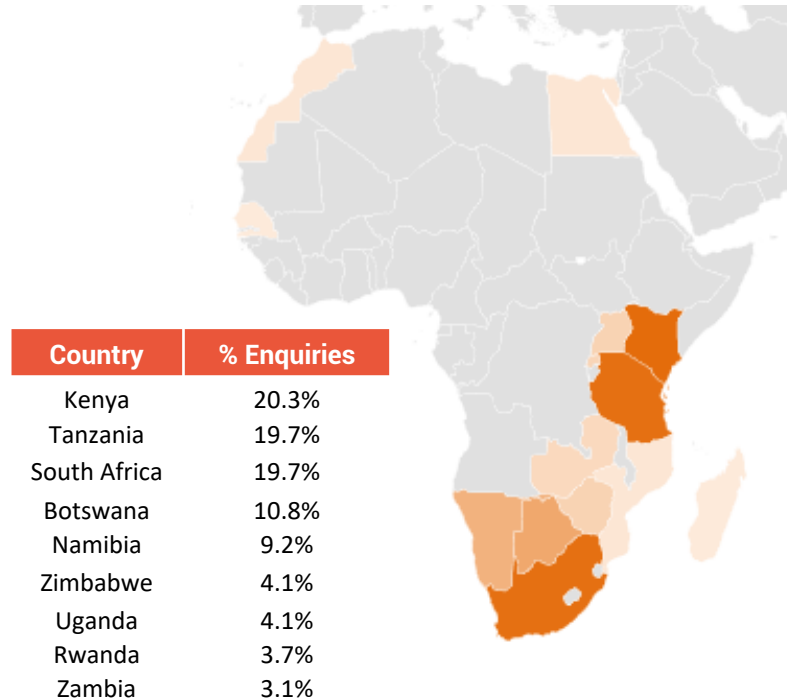


# TOUR OPERATOR & PRIVATE GUIDES

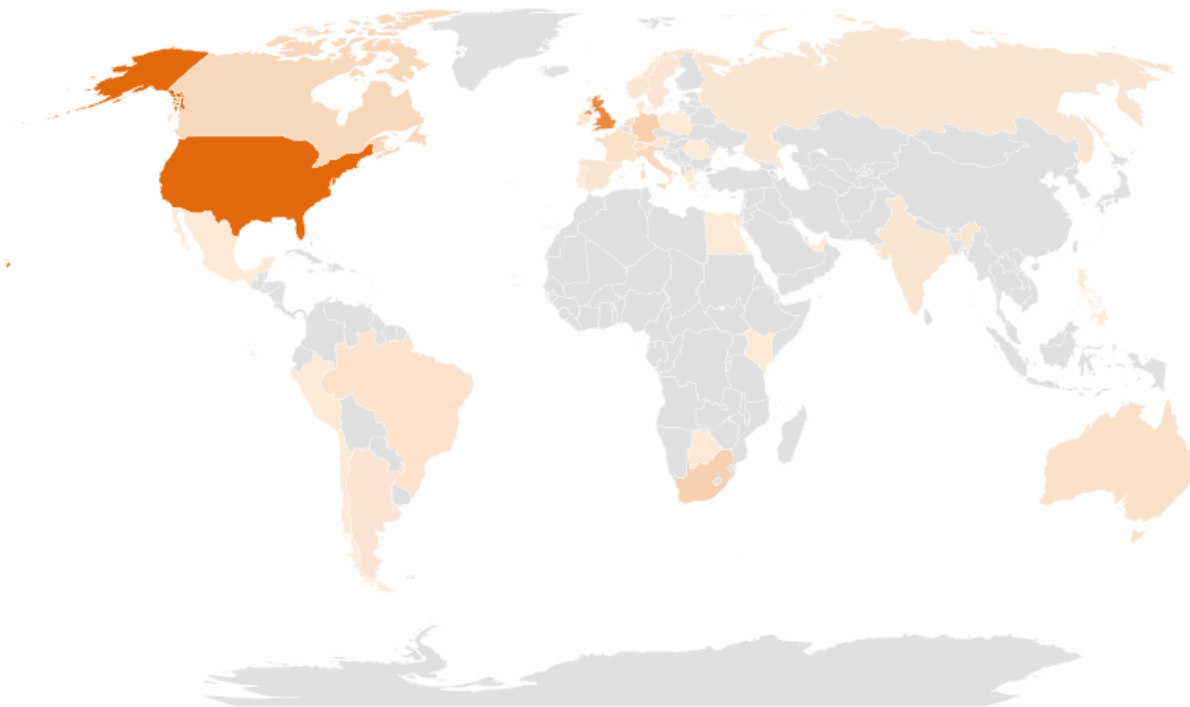
**Q1: Did you receive new enquiries for Africa in January?**



**Q2: Which destinations (countries) were in demand?**

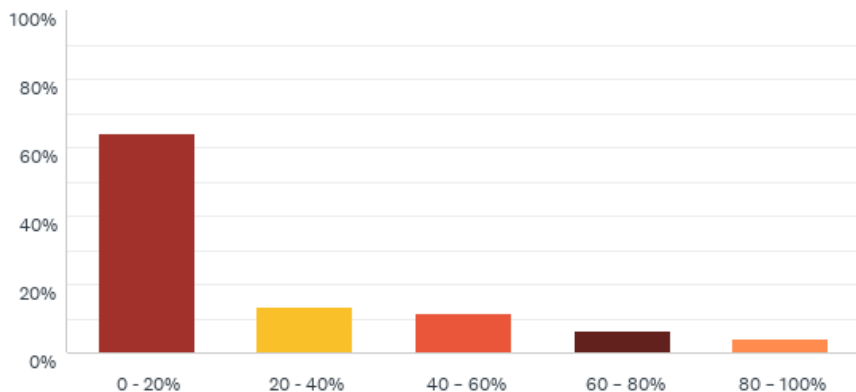


## Q3: What nationalities of clients that travelled in January?



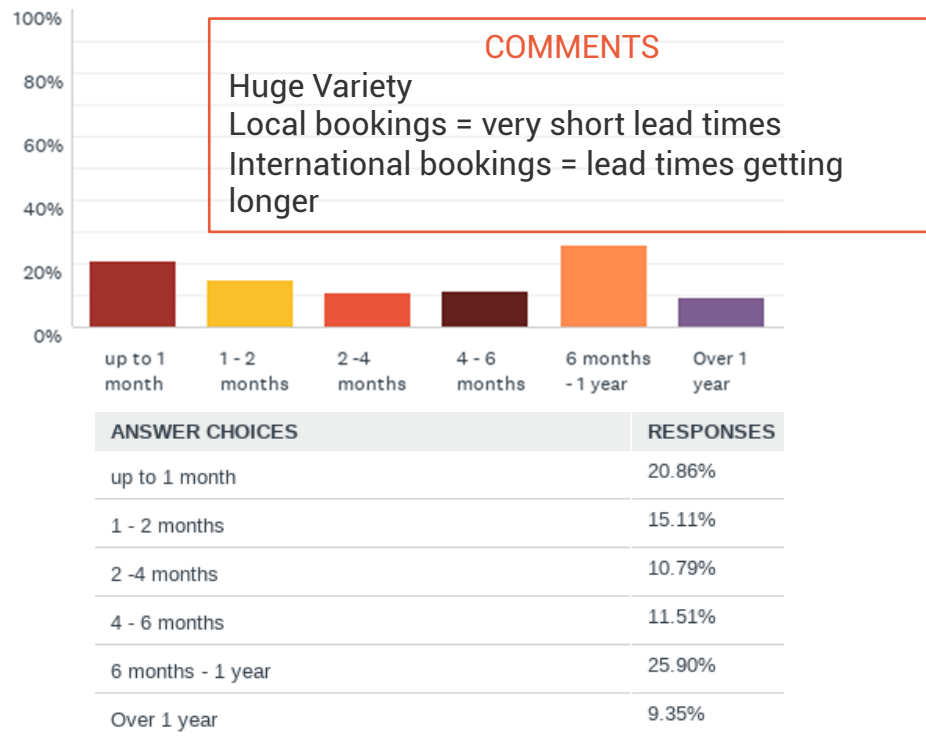
Country	%	Country	%
<b>USA</b>	<b>26.7%</b>	Denmark	1.3%
<b>UK</b>	<b>19.6%</b>	Norway	1.3%
Germany	5.8%	Argentina	0.9%
South Africa	5.3%	Sweden	0.9%
Canada	4.0%	Peru	0.4%
Netherlands	3.6%	Greece	0.4%
Italy	3.6%	Romania	0.4%
Europe	3.1%	Philippines	0.4%
Switzerland	2.7%	Latin America	0.4%
Belguim	2.7%	UAE	0.4%
France	2.2%	Egypt	0.4%
Australia	2.2%	Poland	0.4%
Brazil	1.8%	Chile	0.4%
Austria	1.3%	Portugal	0.4%
Spain	1.3%	Mexico	0.4%
India	1.3%	Botswana	0.4%
Russia	1.3%	Kenya	0.4%
Ireland	1.3%		

## Q4: What % of these enquiries converted to confirmed bookings?

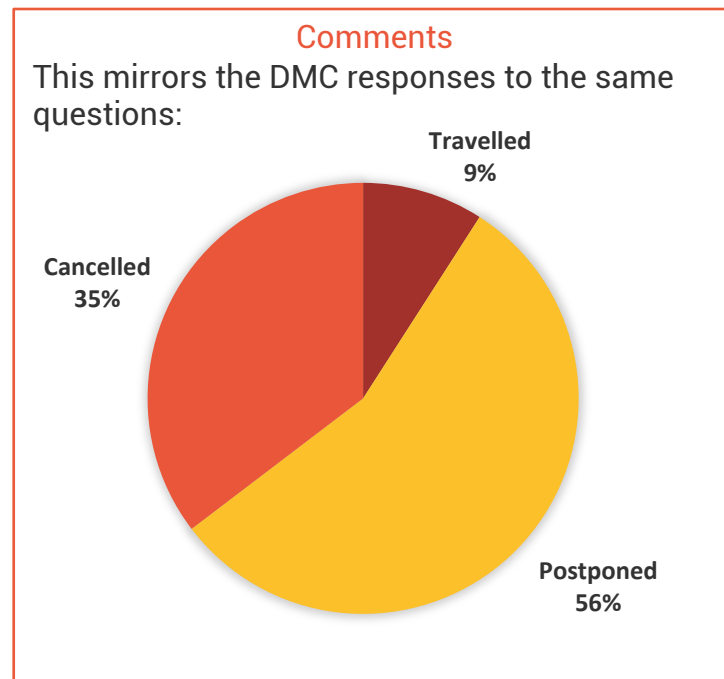
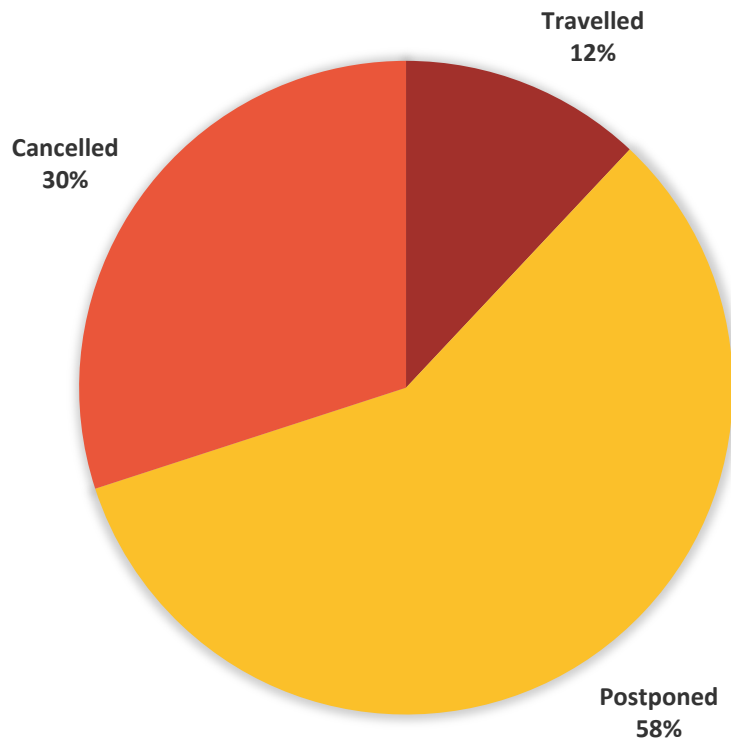


ANSWER CHOICES	RESPONSES
0 - 20%	64.03%
20 - 40%	13.67%
40 - 60%	11.51%
60 - 80%	6.47%
80 - 100%	4.32%

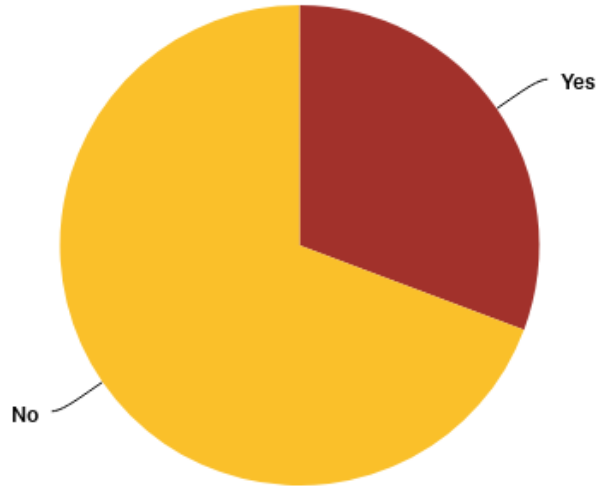
## Q5: Average lead time for these enquiries?



## Q6 From those bookings meant to travel in January, what %.....



## Q7: For those that did travel, did you face any challenges with the Covid-19 protocols required?



ANSWER CHOICES	RESPONSES
Yes	30.73%
No	69.27%

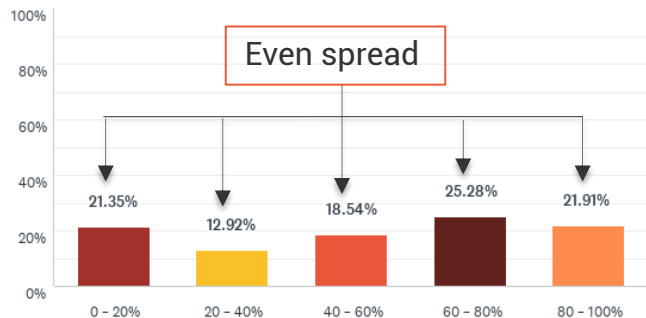
### Comments

Issues included:

- ✈ Flight cancellations within 24 hours of travel – need to be nimble and travel savvy
- ✈ PCR testing: where to get them and within regulations. Timeframes very small – easy to miss a flight if there are any delays, coupled with changing regulations.
- ✈ Tests returning as false positives and requiring multiple tests at a high cost to traveller.
- ✈ Confusion around airline requirements
- ✈ Document checks at airport
- ✈ Finding suitable insurance policies

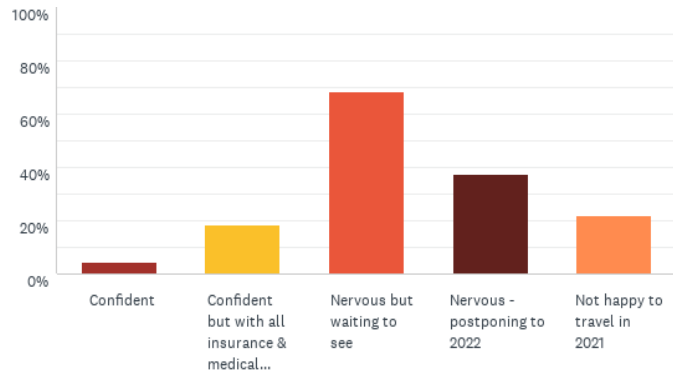
## Q8: What % of your future business is postponed from 2020?

## Q9: Of these, what % have you budgeted to confirm and travel in 2021?



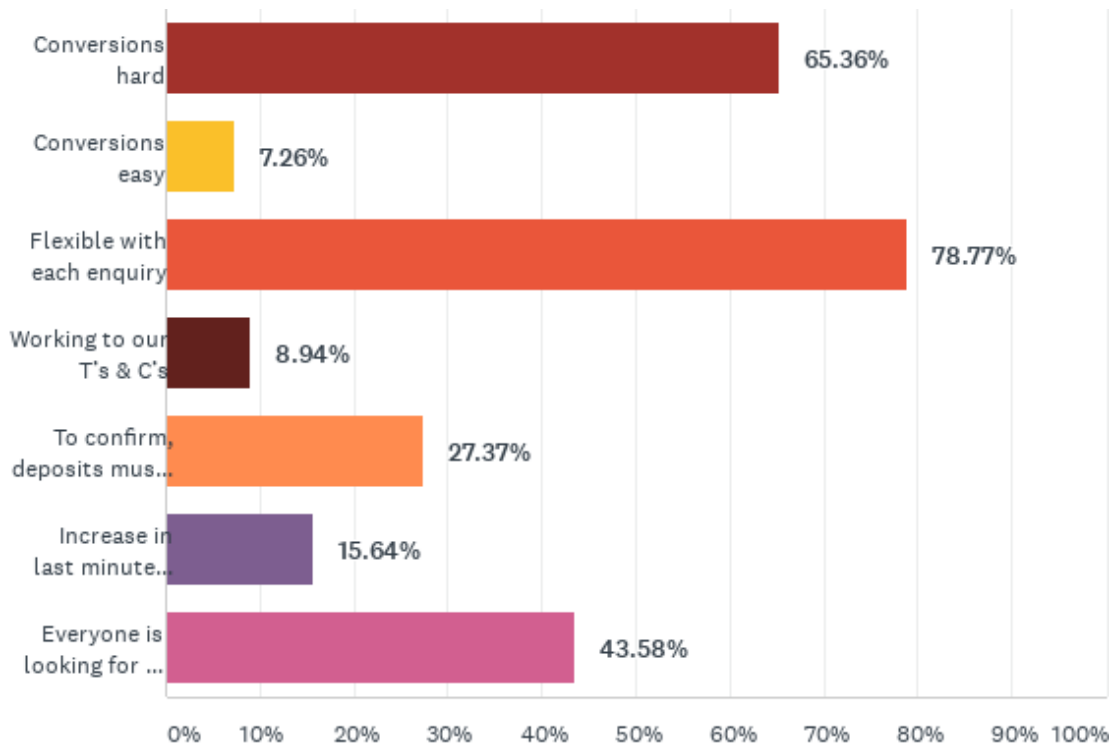
% budgeted to travel in 2021	% of respondents
0-20%	31.84
20 - 40%	15.64
40 - 60%	20.67
60 - 80%	20.67
80 - 100%	11.17

## Q10: TRAVEL IN 2021: What are the feelings from your clients on travel in 2021?



ANSWER CHOICES	RESPONSES
Confident	4.47%
Confident but with all insurance & medical requirements	18.44%
Nervous but waiting to see	68.72%
Nervous - postponing to 2022	37.43%
Not happy to travel in 2021	21.79%

## Q11: Tick those you agree with:



ANSWER CHOICES	RESPONSES
Conversions hard	65.36%
Conversions easy	7.26%
Flexible with each enquiry	78.77%
Working to our T's & C's	8.94%
To confirm, deposits must be paid	27.37%
Increase in last minute business with easy conversion	15.64%
Everyone is looking for a deal	43.58%

# FINAL COMMENTS....

With 324 additional comments throughout the survey, we are extremely grateful for all your input, making this survey a beneficial tool to use and develop.

Below are **TOP 3** recurring themes we have identified:

## 1. NEED FOR POSITIVE PR

- 🌍 To encourage new business
- 🌍 To help slow down postponements – 2022 postponements becoming an increased reality
- 🌍 Too much fear mongering around South African Variant

## 2. FLEXIBILITY IS KEY

- 🌍 Keeping flexible terms until there is more clarity in the market.

## 3. EXPECTATION

- 🌍 Travel to Africa is in demand but...
- 🌍 Confidence in travel is 50/50
- 🌍 The majority of travellers need assurance they can travel safely with government assurance, Covid-19 travel insurance, clearer understanding of travel during / post vaccine roll out.

## ACTION...PR

- 🌍 Combined industry PR effort at all levels to promote travel to Africa in 2021 (not postpone into 2022) across the channels you have best exposure.
- 🌍 Stats! Stat driven examples to demonstrate the essential nature and positive impact that International Travellers have on supporting the protection of wildlife, conservation and wilderness areas.
- 🌍 Share how important tourism is to local communities, the impact of positive travel for 2021.
- 🌍 Promote positive travel experiences through 2020 that can be shared with your clients / guests.



END



THANK YOU

For any further info, comments or suggestions please email: [info@atta.travel](mailto:info@atta.travel)

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