March Snapshot – The Results

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

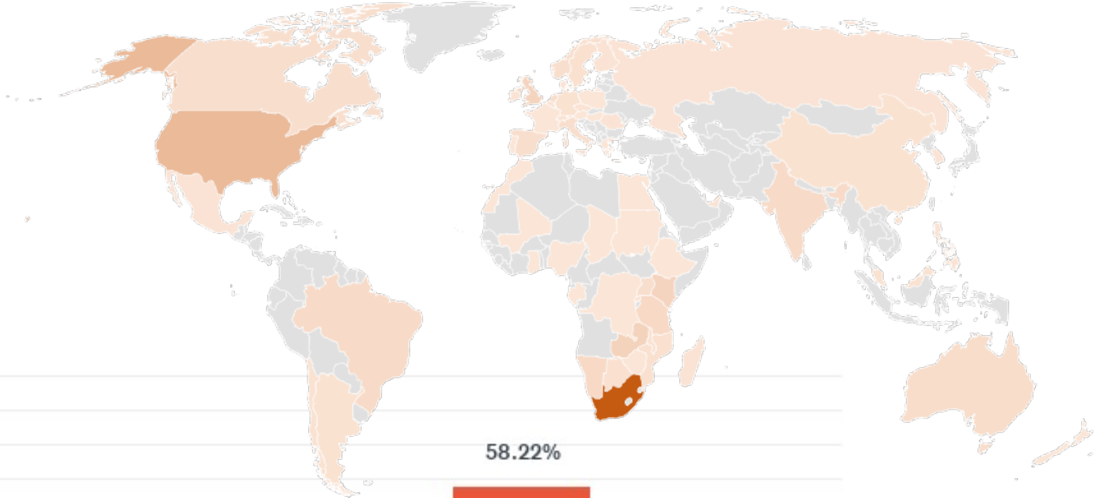
Accommodation providers | DMCs | Tour Operators & Agents | Private Guides

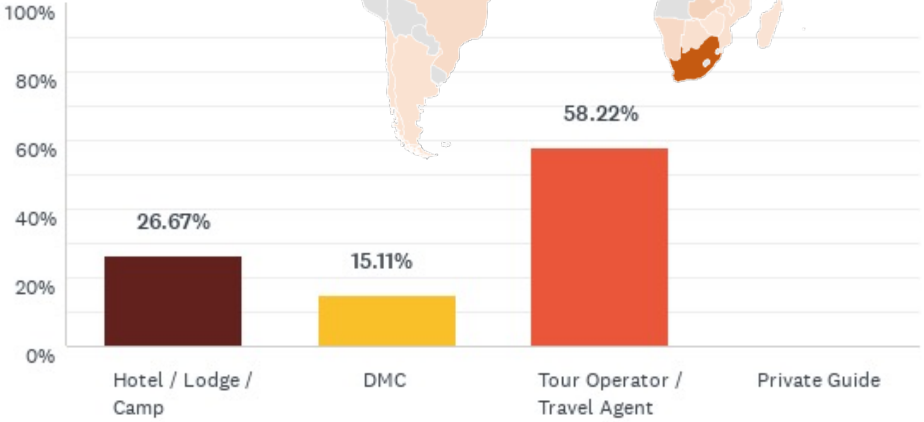
WHY? As an indication of what is happening within the broader African Travel & Tourism industry. Over the upcoming 12 months, the results will support identifying patterns as our industry re-starts, however gradually. Focussing on gaining an insight into:

- 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.

MARCH - WHO PARTICIPATED?





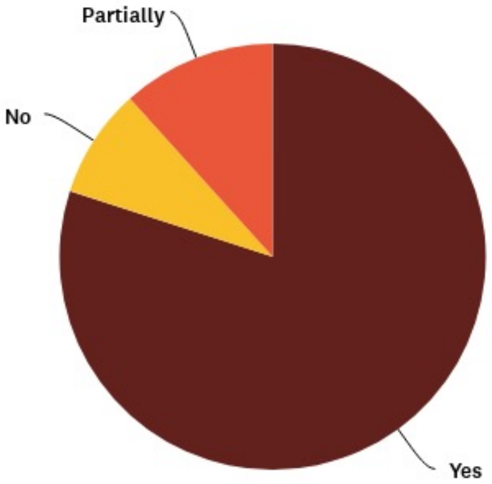
Participating Countries

- Argentina
- Australia
- Belgium
- Botswana
- Brazil
- Canada
- Chile
- China
- Czech Republic
- Denmark
- Finland
- Germany
- India
- Ireland
- Italy
- Kenya
- Madagascar
- Malawi
- Malaysia
- Mexico
- Mozambique
- Namibia
- Netherlands
- Norway
- Philippines
- Romania
- Russia
- Rwanda
- South Africa
- South Korea
- Spain
- Sweden
- Switzerland
- Tanzania
- Uganda
- United Arab Emirates
- United Kingdom
- United States
- Zambia
- Zanzibar

HOTELS / CAMPS / LODGES RESPONSES

HOTELS / CAMPS / LODGES

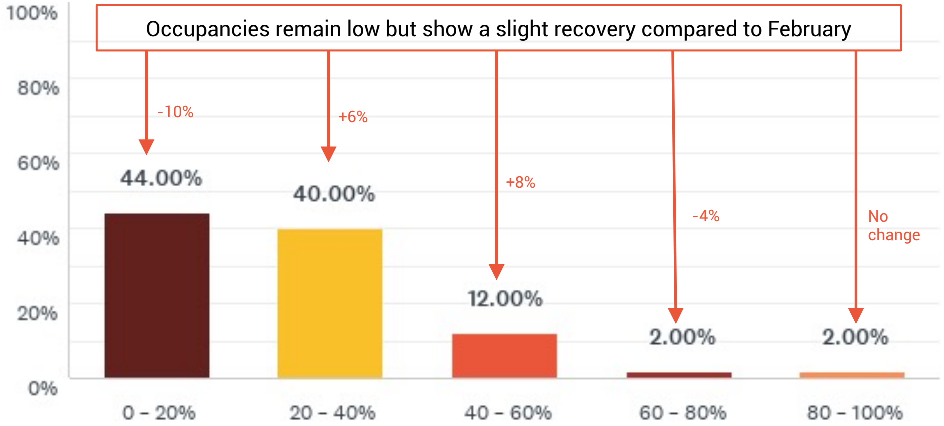
Q1: Were you open in March?



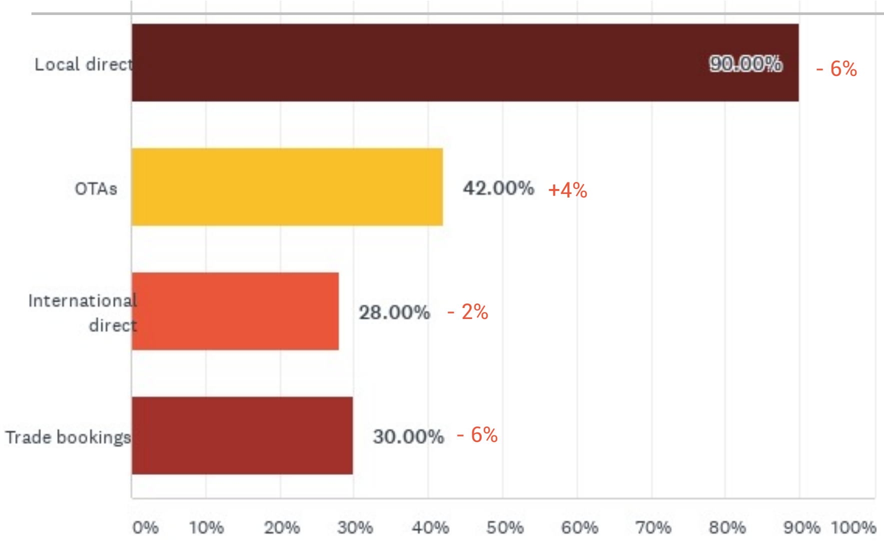
ANSWER CHOICES	RESPONSES
Yes	80.00%
No	8.33%
Partially	11.67%

20% of these 8% closed due to seasonality (Q7).

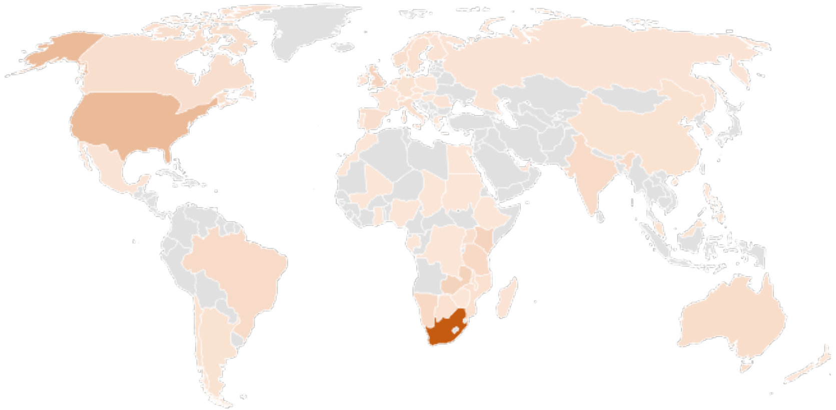
Q2: What was your March occupancy level?



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



Q4: Where were your March travellers arriving from?



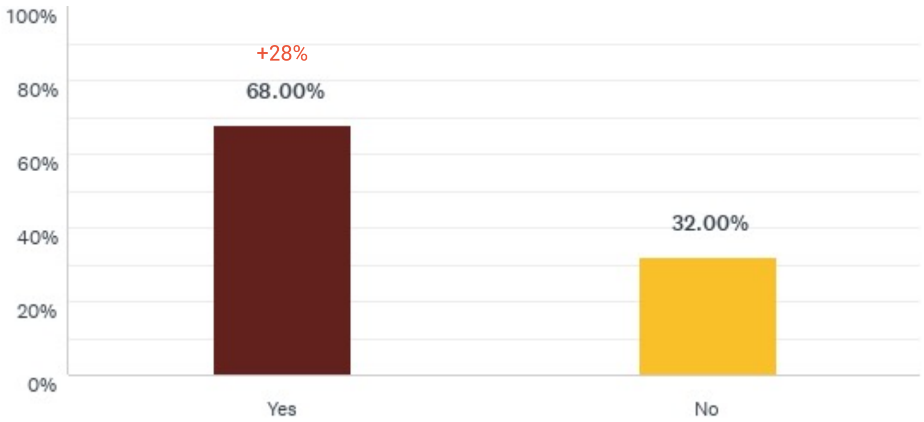
Countries		
Australia	Italy	Spain
Austria	Japan	Sweden
Belgium	Lithuania	**Switzerland**
Canada	Netherlands	Thailand
Denmark	Norway	United Arab Emirates
Domestic	Poland	**United Kingdom**
France	Qatar	**United States of America**
Germany	Romania	Zimbabwe
India	Russia	
Israel	**South Africa (not domestic)**	

Top Arrivals by Nationality

1. Domestic 2. USA 3= South Africa (non domestic) & Germany 5= UK & Switzerland

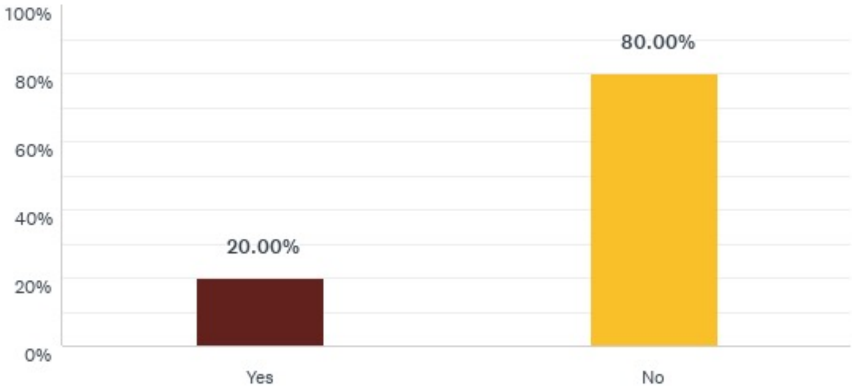
Top 5 arrivals remain unchanged. USA moved from 5th – 2nd highest arrivals.

Q5: Have you seen an increase in local business in March?



Comment
Domestic markets making increased positive impacts on hotels, camps and lodges.

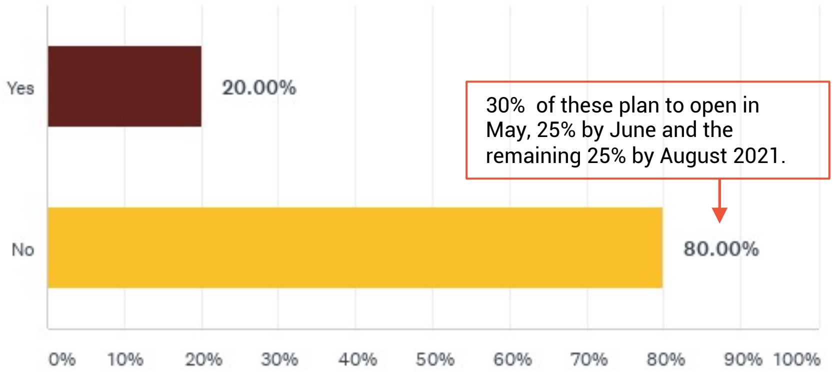
Q6: Have you welcomed guests from any new markets in March? If yes, from which countries?*



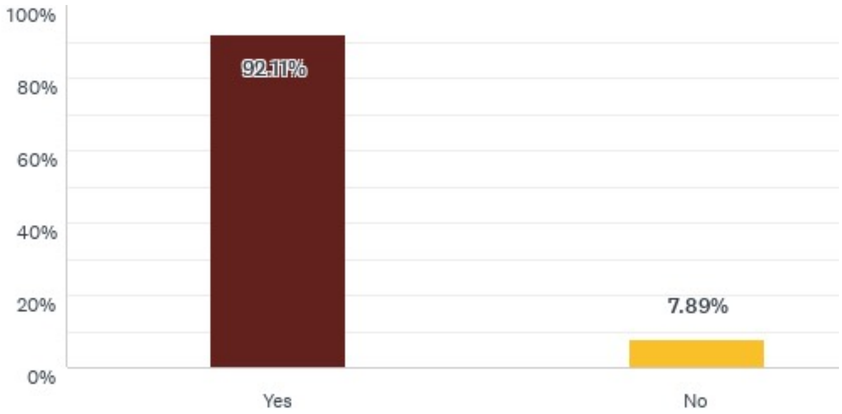
New Markets
Russia | Algeria | Austria | Germany | Israel | Lithuania | Netherlands | Poland | Qatar | Romania

* New question for March survey

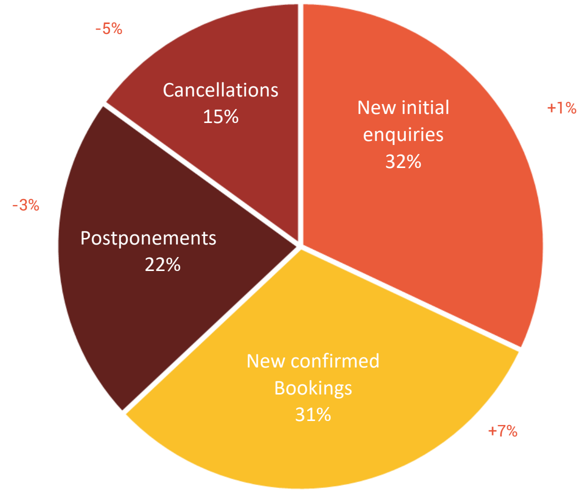
Q7: If closed in March, is your camp seasonal?



Q8: Were you taking enquiries / new bookings in March?

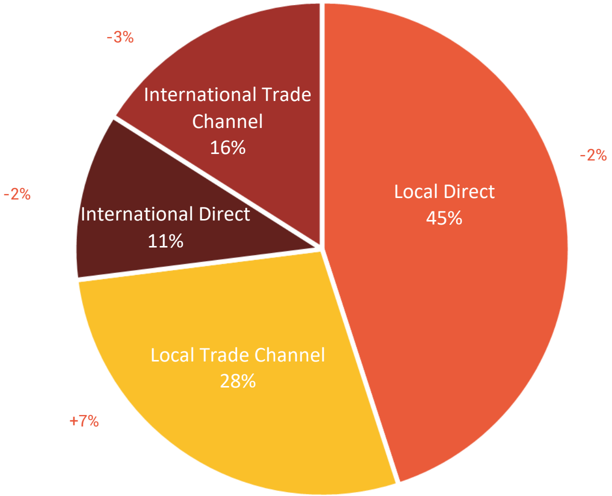


Q9: ENQUIRY TYPE: %
breakdown of your enquiries



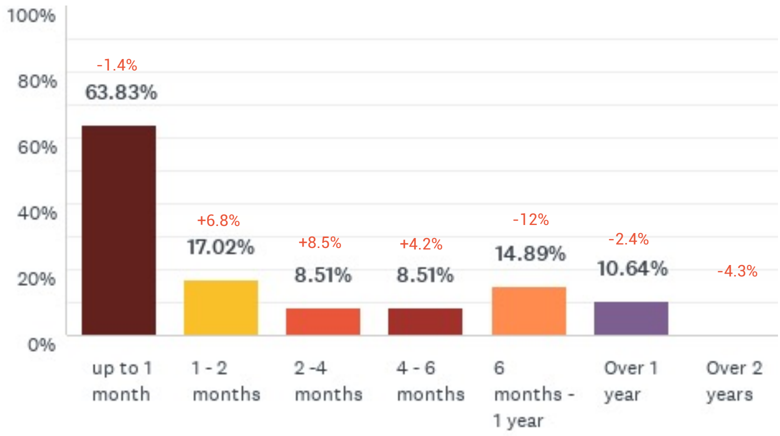
February v's March
Small but steady positive movement

Q10: BOOKING CHANNELS: %
breakdown of booking channels:



February v's March
Local Trade business providing increased bookings in March.

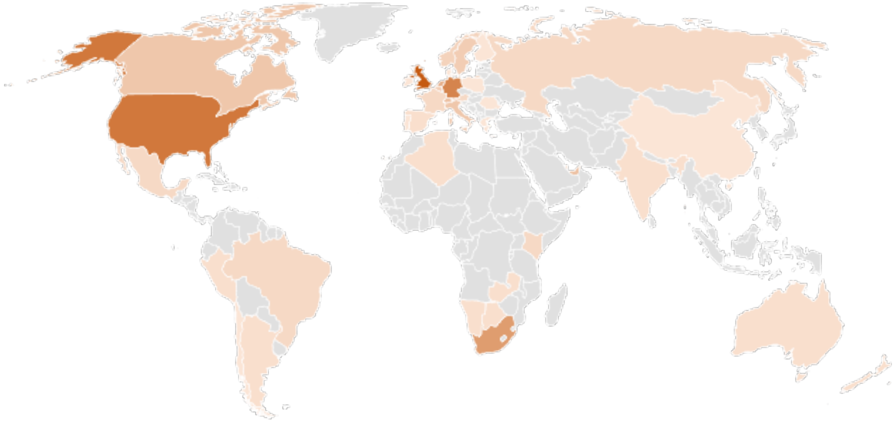
Q11: Average lead time of confirmed bookings made in March:



Comments

- No respondents had “zero” bookings in March
- Demand for travel up to 6 months remains strong
- Erratic future bookings

Q12: From which countries are your new enquiries originating?



Top 3 countries for enquiries

1. UK
2. USA
3. Germany

Same source markets as January and February but in a different order. February = 1.Germany 2. UK 3. USA

See Excel doc for full breakdown

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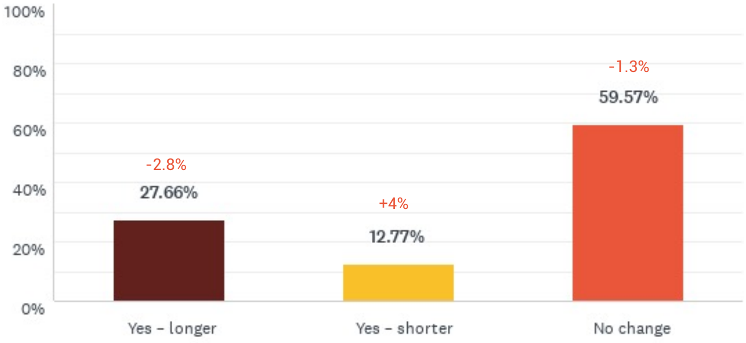
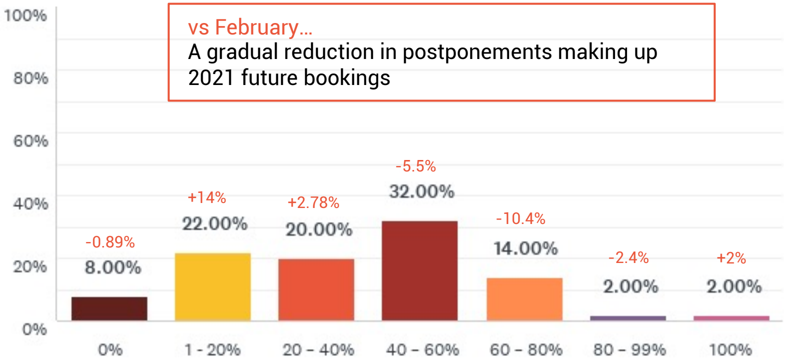
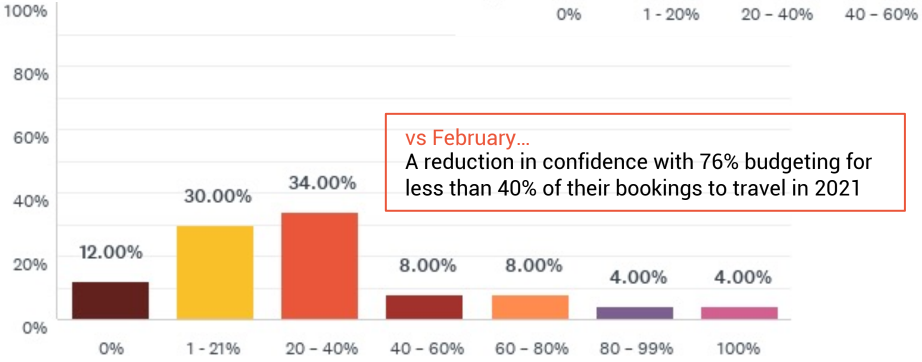
Q13: Within these enquiries & confirmations, have you seen a change in lengths of stay?



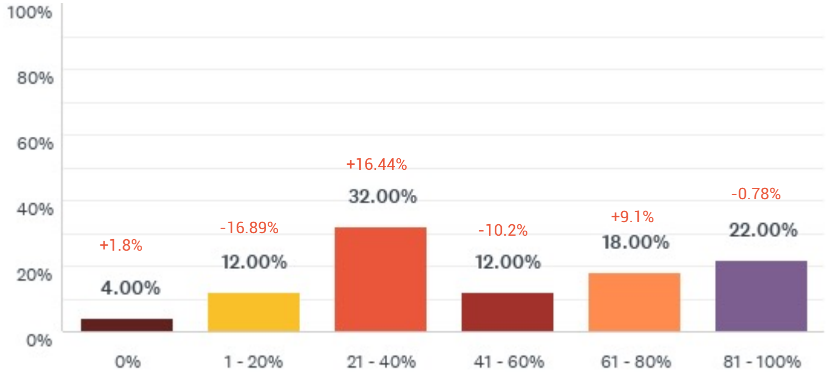
Q14: FUTURE BOOKINGS - What % are postponements from 2020?



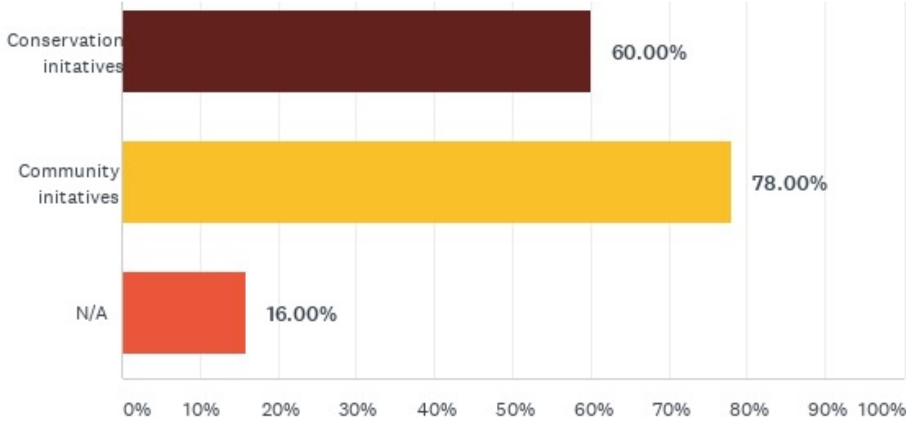
Q15: Of these, what % have you budgeted to confirm and travel in 2021?



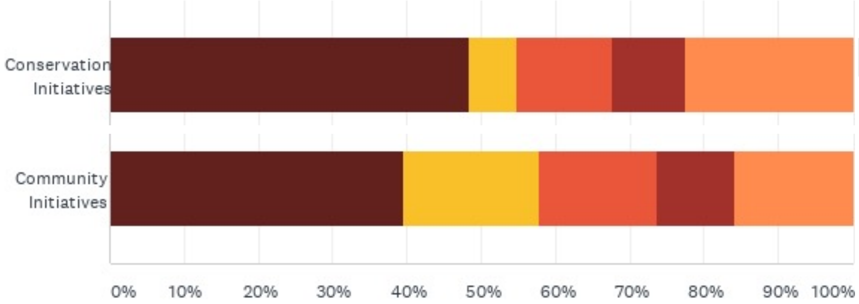
Q16: What % of staffing were you operating in March?



Q14: Do you own, manage or support:



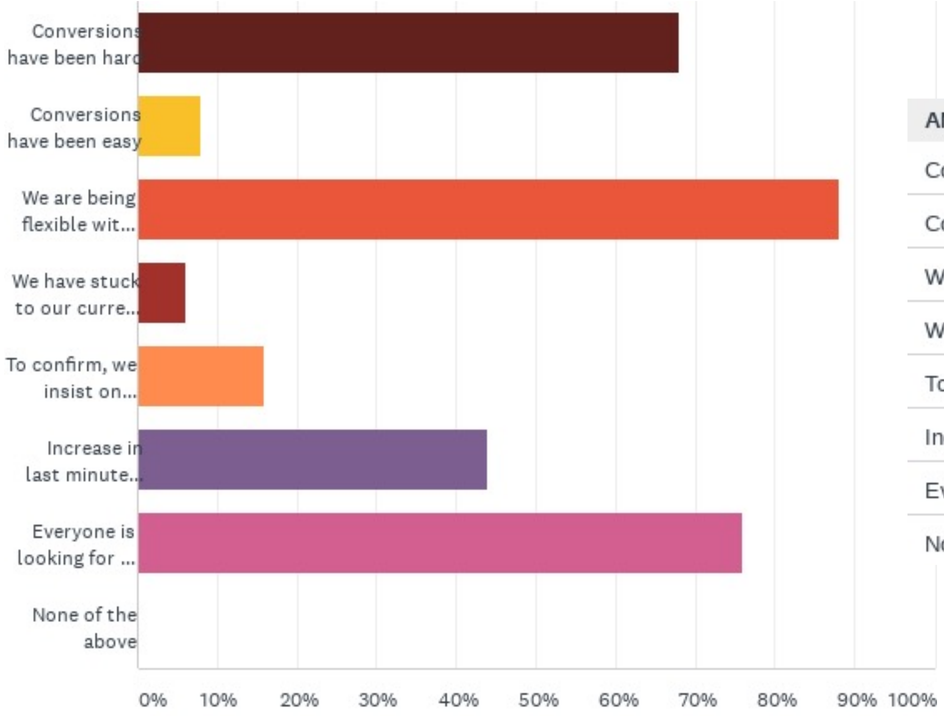
Q15:To what extent are you currently able to support these initiatives?



	0 - 20%	20 - 40%	40 - 60%	60 - 80%	80 - 100%
Conservation Initiatives	48.39%	6.45%	12.90%	9.68%	22.58%
Community Initiatives	39.47%	18.42%	15.79%	10.53%	15.79%

22.6% of conservation & 15.8% of community initiatives have retained 80 – 100% of their support by the properties

Q17: In the current climate, tick those you agree with:

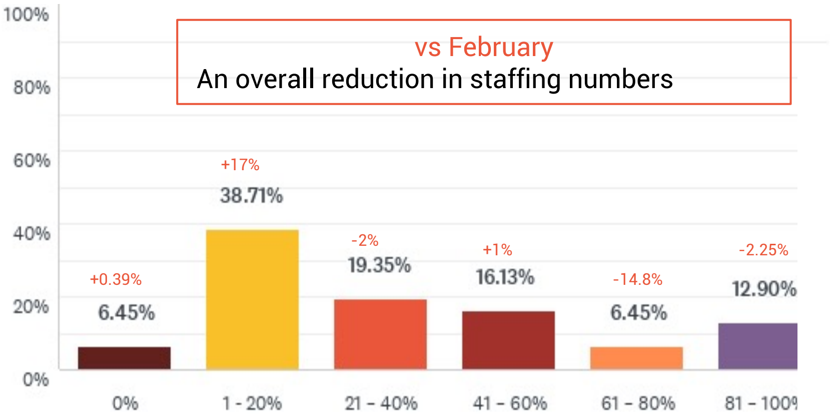


ANSWER CHOICES	RESPONSES
Conversions have been hard	68.00%
Conversions have been easy	8.00%
We are being flexible with each enquiry	88.00%
We have stuck to our current T's & C's	6.00%
To confirm, we insist on deposits	16.00%
Increase in last minute business with easy conversion	44.00%
Everyone is looking for a deal	76.00%
None of the above	0.00%

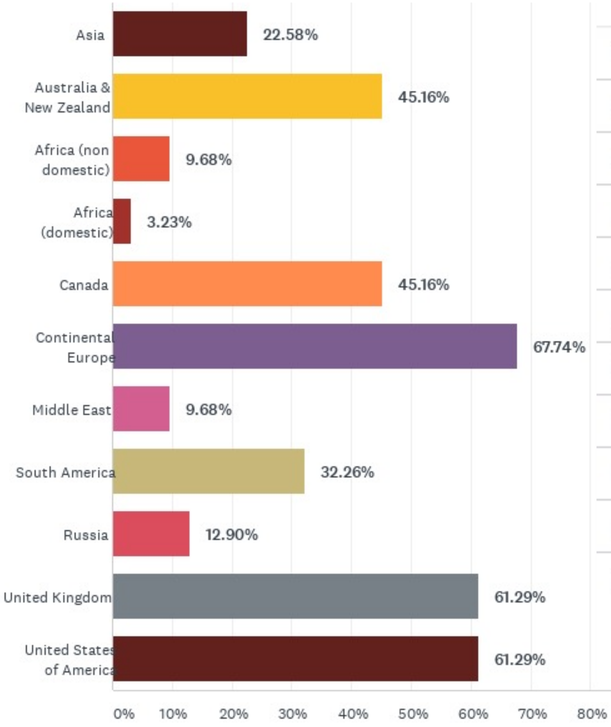
No change in market sentiments since January

DMC RESPONSES

Q1: What % of staffing were you operating at for March?

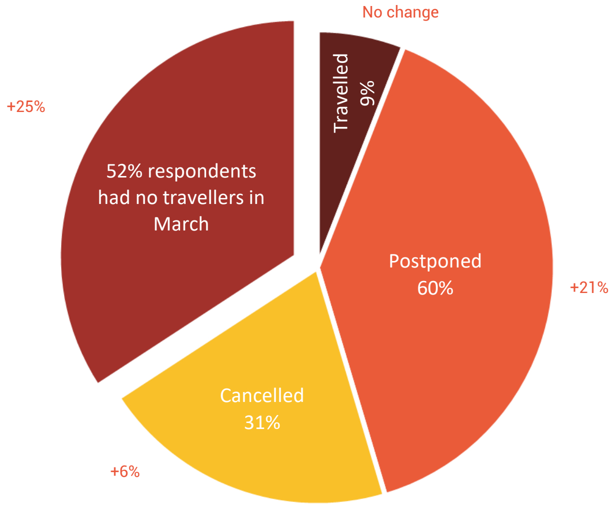


Q2: Where are your traditional source markets?



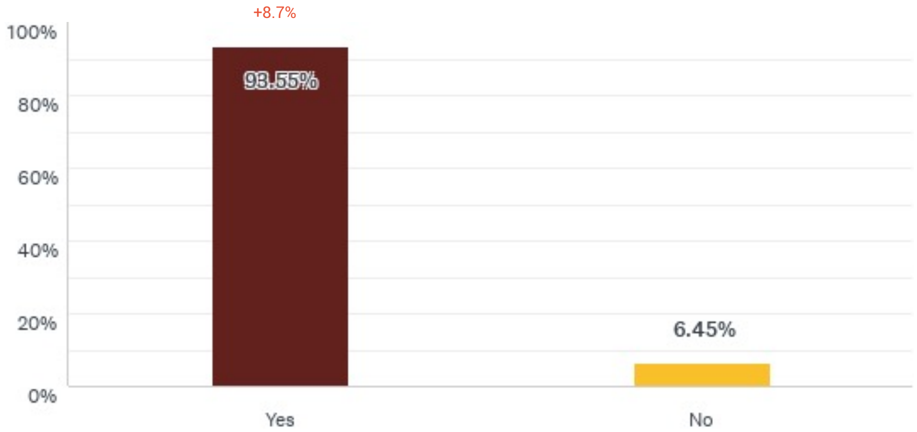
Asia	22.58%
Australia & New Zealand	45.16%
Africa (non domestic)	9.68%
Africa (domestic)	3.23%
Canada	45.16%
Continental Europe	67.74%
Middle East	9.68%
South America	32.26%
Russia	12.90%
United Kingdom	61.29%
United States of America	61.29%

Q3: What % of bookings meant to travel in March......

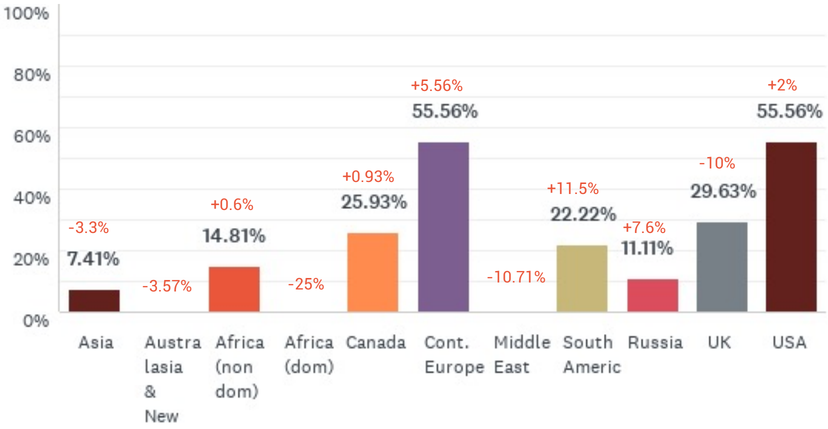


Comments
March saw a 25% increase in DMC companies without any travellers having moved bookings to later in the year or had them previously cancelled.

Q4: Were you taking new enquiries in March?



Q5: In which source markets did your enquiries originate?



ANSWER CHOICES	RESPONSES
Asia	7.41%
Australasia & New Zealand	0.00%
Africa (non dom)	14.81%
Africa (dom)	0.00%
Canada	25.93%
Cont. Europe	55.56%
Middle East	0.00%
South Americ	22.22%
Russia	11.11%
UK	29.63%
USA	55.56%

Q6. Top 3 source countries for enquiries

1. USA 2. Germany 3.UK

Important to note: a wide variety of countries were highlighted as a "Top Source Country" including: Belgium, Brazil, Bulgaria, Canada, Czech Republic, France, Italy, Asia, Mexico, Poland, Russia, Spain, South Africa, South America, Switzerland,

Q7: Have you seen enquiries from any new markets for your company?

New Markets:
Bulgaria | Canada | Czech Republic | India | Mexico | Romania | South Africa | South America | Spain | USA

Q8: FUTURE BOOKINGS: What % of your 2021 bookings are postponements from 2020?

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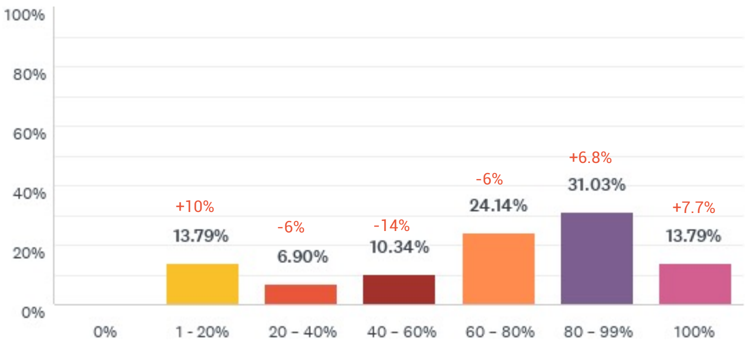
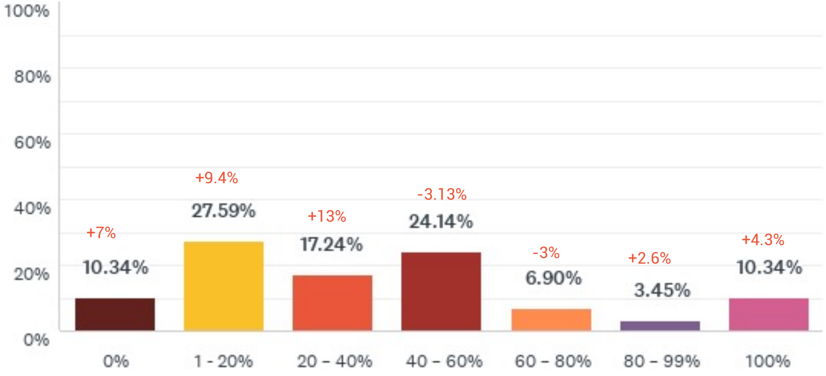


ANSWER CHOICES	RESPONSES
0%	0.00%
1 - 20%	13.79%
20 – 40%	6.90%
40 – 60%	10.34%
60 – 80%	24.14%
80 – 99%	31.03%
100%	13.79%

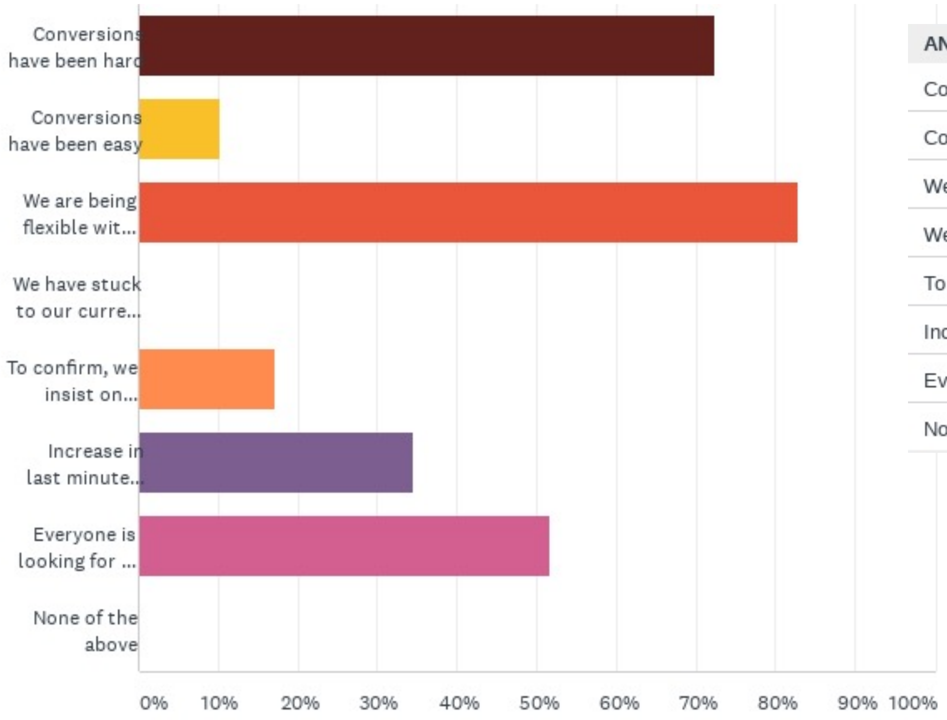
Postponements from 2020 make up a higher % of DMCs future bookings than for hotels / lodges /camp. Confidence remains uncertain as to the opportunity to travel.

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



ANSWER CHOICES	RESPONSES
0%	10.34%
1 - 20%	27.59%
20 – 40%	17.24%
40 – 60%	24.14%
60 – 80%	6.90%
80 – 99%	3.45%
100%	10.34%

Q9: Tick those you agree:

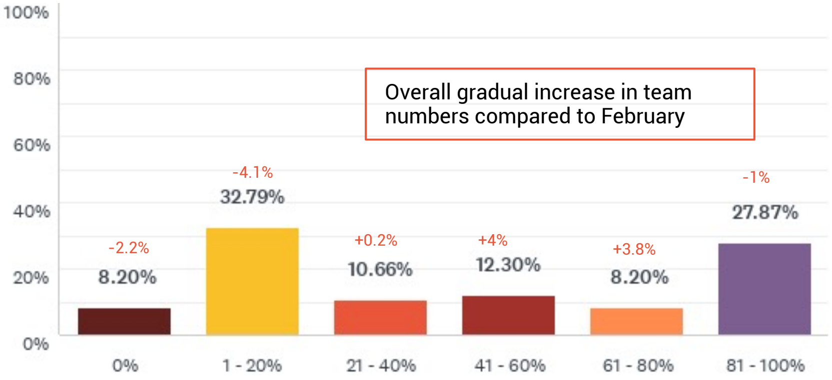


ANSWER CHOICES	RESPONSES
Conversions have been hard	72.41%
Conversions have been easy	10.34%
We are being flexible with each enquiry	82.76%
We have stuck to our current T's & C's	0.00%
To confirm, we insist on deposits	17.24%
Increase in last minute business with easy conversion	34.48%
Everyone is looking for a deal	51.72%
None of the above	0.00%

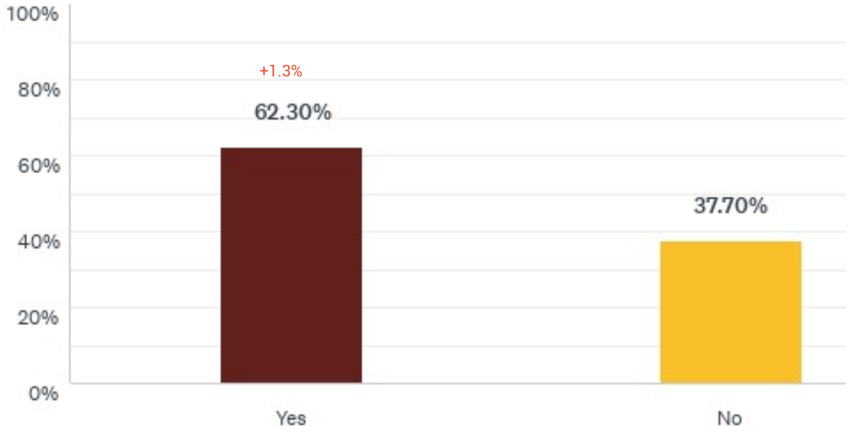
Comments
- Flexibility remains key
- Relationships essential
- Conversions are increasingly difficult unless they are last minute

TOUR OPERATOR / TRAVEL AGENT / PRIVATE GUIDE RESPONSES

Q1: What % of staffing were you operating at for March?

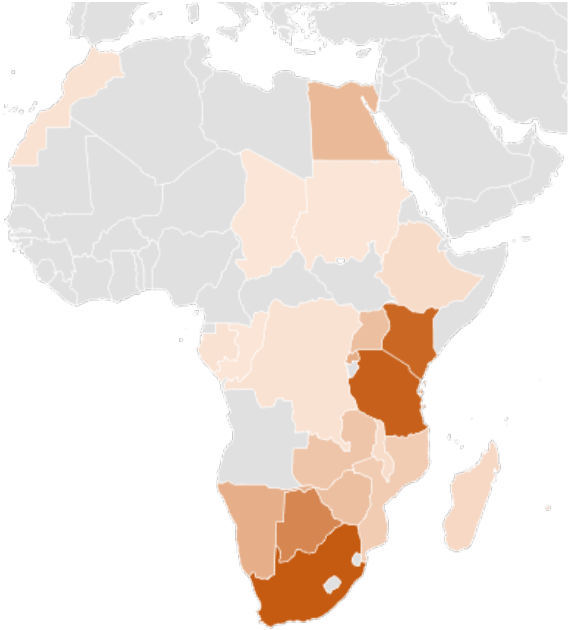


Q2: Were you receiving new enquiries for Africa in March?

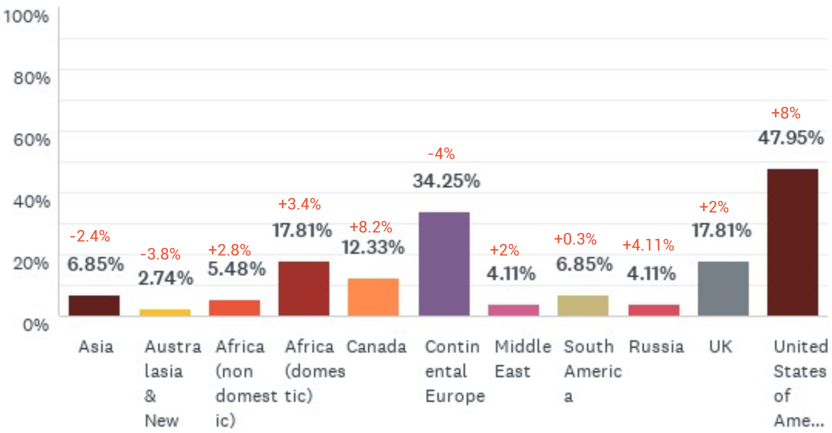


Q3: Which destinations (countries) were in demand?

Country	% Enquiry
South Africa	60%
Tanzania	58%
Kenya	55%
Botswana	41%
Rwanda	25%
Namibia	23%
Egypt	19%
Uganda	16%
Zimbabwe	16%
Seychelles	15%
Zambia	14%
Mauritius	12%
Zanzibar	12%
Mozambique	11%



Q4: Where did your March enquiries originate from?

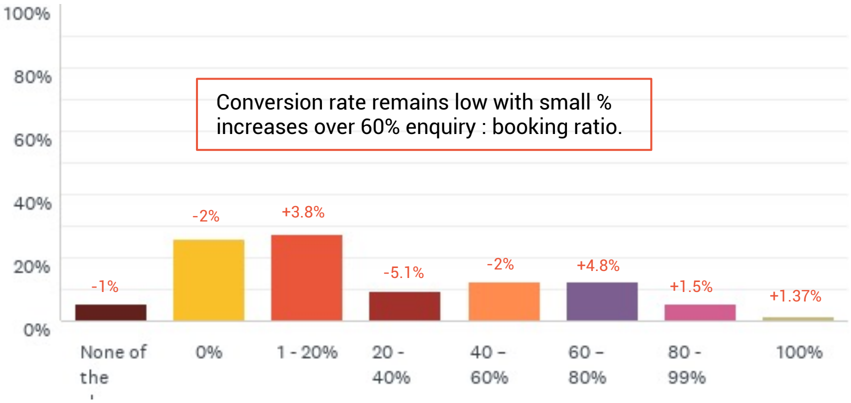


Top 3 Originating Areas

1. USA
2. Continental Europe
3. South Africa (domestic) & UK

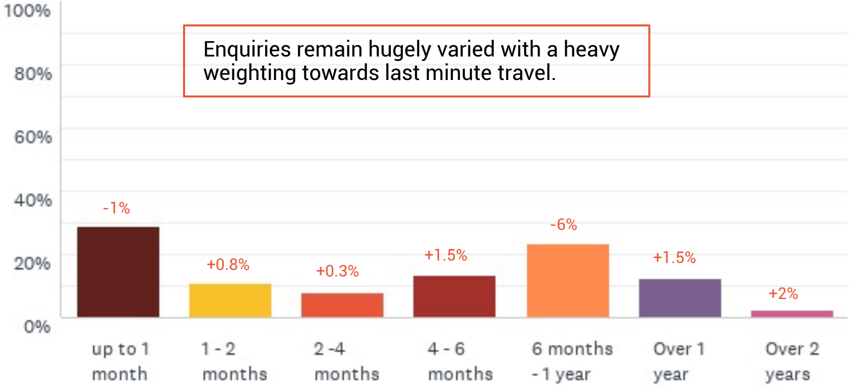
Notable increases in enquiries from USA and Canada.

Q5: What % of these enquiries converted to confirmed bookings?

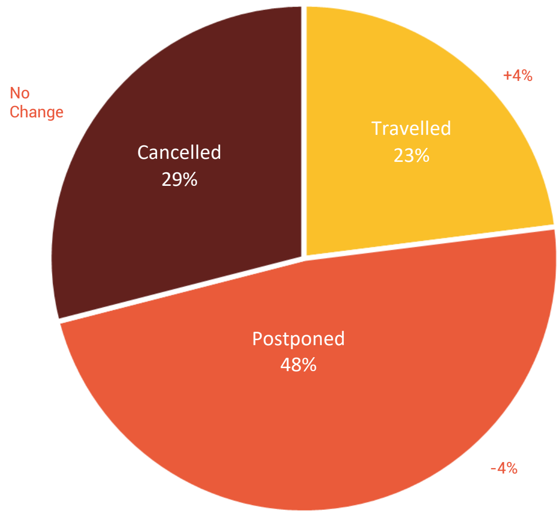


ANSWER CHOICES	RESPONSES
None of the above	5.48%
0%	26.03%
1 - 20%	27.40%
20 - 40%	9.59%
40 – 60%	12.33%
60 – 80%	12.33%
80 - 99%	5.48%
100%	1.37%

Q6: What was the average lead time for these enquiries?

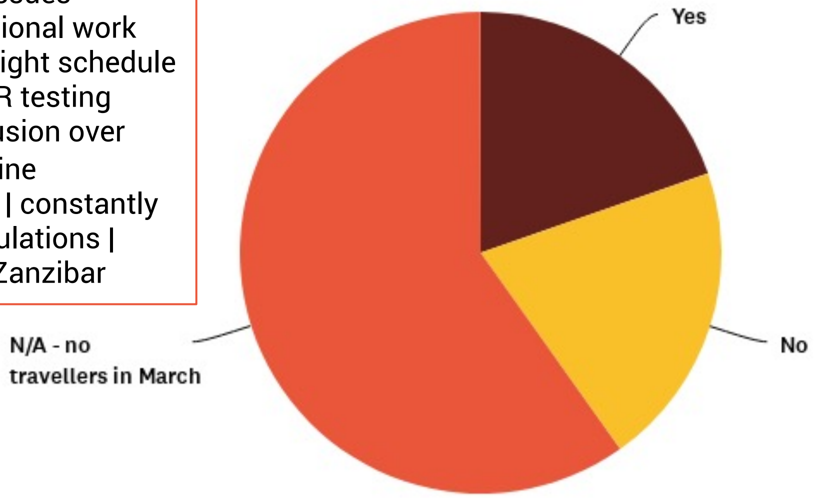


Q7: What % of bookings meant to travel in March....

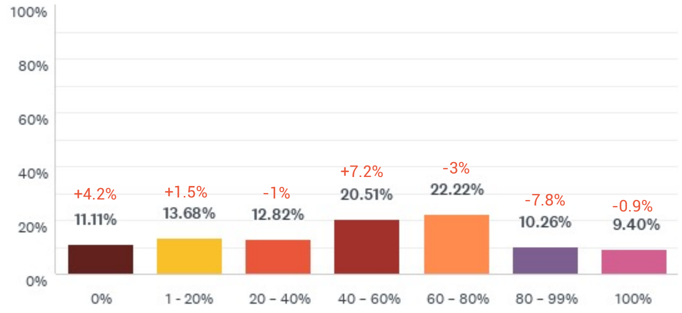


Q8: For those that did travel, did you face any challenges with the Covid-19 protocols required?

vs February
Very similar issues causing additional work and stress: Flight schedule changes | PCR testing delays | confusion over country & airline requirements | constantly changing regulations | PCR tests in Zanzibar



Q9: What % of your future bookings are postponements from 2020?

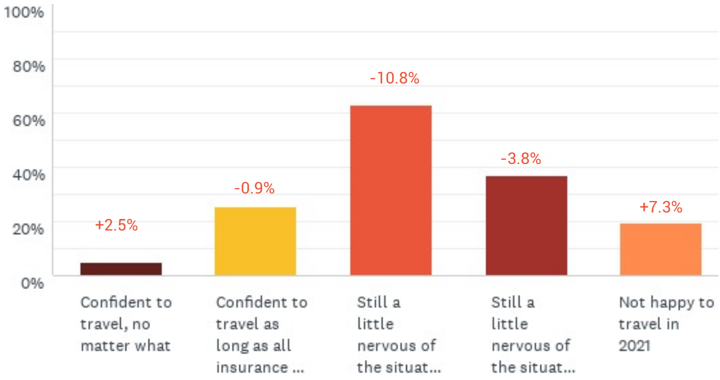


Q10: Of these, what % have you budgeted to confirm and travel in 2021?

Expectation of travel remains the same as February with a large amount of caution and varied opinions

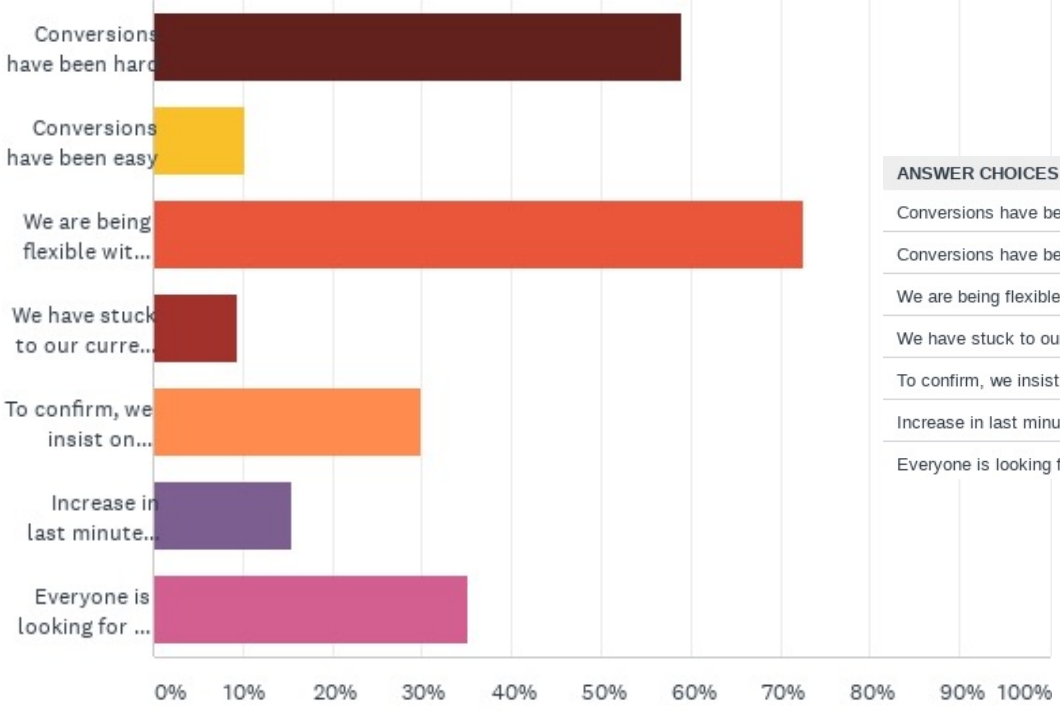
% budgeted to travel in 2021	% of respondents
0%	19
1 - 20%	24
21 – 40%	21
41 – 60%	15
61 – 80%	13
81 – 99%	13
100%	5

Q11: What are the feelings from your clients on travel in 2021?



ANSWER CHOICES	RESPONS
Confident to travel, no matter what	5.13%
Confident to travel as long as all insurance and medical requirements are covered and easy	25.64%
Still a little nervous of the situation but waiting to see	63.25%
Still a little nervous of the situation so postponing to 2022	36.75%
Not happy to travel in 2021	19.66%

Q12: Tick those you agree:



ANSWER CHOICES	RESPONSES
Conversions have been hard	58.97%
Conversions have been easy	10.26%
We are being flexible with each enquiry	72.65%
We have stuck to our current T's & C's	9.40%
To confirm, we insist on deposits	29.91%
Increase in last minute business with easy conversion	15.38%
Everyone is looking for a deal	35.04%

Comments

- Flexibility remains key
- Relationships essential
- Conversions remain challenging, whilst 7% fewer respondents consider them "hard"

FINAL COMMENTS….

1. MARCH TRAVELLERS

- Domestic travel remains strong and whilst heavily led by direct bookings, local trade business has increased.
- Traditional markets of USA, Germany, UK continue to remain strong with enquiries but actual travel remains low.
- March saw a wide spread of "top source countries" and a number of "new market" to accommodation suppliers and DMCs including from: Israel, Japan, Russia, Bulgaria, Qatar, Netherlands, Lithuania, India and South Africa.
- South Africa is a buoyant market for both domestic travel and international travel within Africa.

2. TRAVEL INDUSTRY STAFFING

- 40% of Accommodation Suppliers respondents are operating 60-100%, an **increase of 8%** from February.
- 36% of Tour Operators / Travel Agents respondents are operating at 60-100%, an **increase of 2.8%** from March
- 19.3% of DMC respondents are operating at 60 – 100%, a **decrease of 17%** from March

3. CONFIDENCE IN TRAVEL FOR 2021

- Enquiries are up across all 3 categories
- Travellers confidence in travel for 2021 has increased at opposite ends of the scale. They are either more determined to travel (+2.5%) or have decided not to travel (+7.3%). The majority remain happy to wait for developments on restrictions.
- Postponements continue to make up the largest category of enquiries.

ACTION…we have stats!

Following our action points from January & February, ATTA® has a collection of statistics from 2018, 2019, 2020 and predicted statistics for 2021 - 2022 in Kenya, Namibia, Rwanda, South Africa, Zambia & Zimbabwe for:

- Leisure arrival numbers
- Internal Travel & Tourism spending
- Travel & Tourism Direct contribution to employment
- Travel & Tourism contribution

We also have a collection of incredible **Case Studies** on how Travel & Tourism positively affects countries within Africa & the essential nature of Travel & Tourism in conserving wildlife, wilderness and communities.

- If you would like access to data please email us on info@atta.travel
- If you have data to share, please email us on: info@atta.travel