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# Leveraging Travel Intelligence to Shape the Future of Tourism and Air Transport

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# *Understand the entire Traveler Journey*

*Data-driven insights that fuel the travel ecosystem*

# Africa

# Where do visitors come from? Reality vs. aspirations

## Top 10 origin markets searched to Africa

| Origin market | Jul.23-Jun.24 ranking | Jul.24-Jun.25 ranking |
|---|---|---|
| France | 1 | 1 |
| United States | 2 | 2 |
| United Kingdom | 3 | 3 |
| South Africa | 4 | 4 |
| Germany | 5 | 5 |
| China | 14 | 6 |
| Italy | 6 | 7 |
| Spain | 8 | 8 |
| Canada | 7 | 9 |
| Utd Arab Emirates | 9 | 10 |

## Top 10 origin markets travelling to Africa

| Origin market | Jul.23-Jun.24 ranking | Jul.24-Jun.25 ranking | Jul.24-Jun.25 vs Jul.23-Jun.24 |
|---|---|---|---|
| France | 1 | 1 | 1% |
| South Africa | 2 | 2 | -7% |
| Algeria | 5 | 3 | 8% |
| United States | 3 | 4 | -5% |
| United Kingdom | 4 | 5 | -3% |
| Italy | 6 | 6 | 5% |
| Morocco | 8 | 7 | 6% |
| Germany | 7 | 8 | -6% |
| Nigeria | 9 | 9 | -2% |
| Tanzania | 12 | 10 | 4% |





Source: Navigator360™ as of Sunday, 29 June 2025

# Unlock opportunities: Are travellers from these markets to Africa already on your radar?

Top 10 origin markets travelling to Africa with the highest growth (among the TOP 30)

| Origin market | Jul.24-Jun.25 vs Jul.23-Jun.24 ranking | YoY Growth |
|---|---|---|
| Egypt | 1 | 11% |
| Zambia | 2 | 9% |
| Canada | 3 | 8% |
| Algeria | 4 | 8% |
| Ghana | 5 | 8% |
| Portugal | 6 | 6% |
| Morocco | 7 | 6% |
| Saudi Arabia | 8 | 6% |
| Italy | 9 | 5% |
| Mauritius | 10 | 5% |





Source: Navigator360™ as of Sunday, 29 June 2025

# Where do visitors go ? Reality vs. aspirations

## Top 10 searched destinations in Africa

| Destination | Jul.23-Jun.24 ranking | Jul.24-Jun.25 ranking |
|---|---|---|
| Morocco | 1 | 1 |
| South Africa | 2 | 2 |
| Tunisia | 3 | 3 |
| Tanzania | 4 | 4 |
| Kenya | 5 | 5 |
| Nigeria | 7 | 6 |
| Algeria | 6 | 7 |
| Mauritius | 8 | 8 |
| Ghana | 9 | 9 |
| Ethiopia | 11 | 10 |

## Top 10 booked destinations in Africa

| Destination | Jul.23-Jun.24 ranking | Jul.24-Jun.25 ranking | Jul.24-Jun.25 vs Jul.23-Jun.24 |
|---|---|---|---|
| South Africa | 1 | 1 | -3% |
| Morocco | 2 | 2 | 1% |
| Algeria | 3 | 3 | 8% |
| Tunisia | 4 | 4 | 1% |
| Tanzania | 6 | 5 | 3% |
| Kenya | 5 | 6 | -5% |
| Mauritius | 7 | 7 | -3% |
| Nigeria | 8 | 8 | -4% |
| Ethiopia | 9 | 9 | -6% |
| Senegal | 10 | 10 | 0% |





Source: Navigator360™ as of Sunday, 29 June 2025

# H2 Outlook: Southern and Eastern Africa drives continental growth

Forecasted air supply for international flights to Africa between July and December 2025; vs previous year



| Destination | H2 2025 % Share | vs 2024 |
|---|---|---|
| North Africa | 50% | +7% |
| Eastern Africa | 25% | +10% |
| Western Africa | 13% | +7% |
| Southern Africa | 8% | +13% |
| Central Africa | 4% | +5% |

| Destination | H2 2025 % Share | vs 2024 |
|---|---|---|
| Egypt | 21.9% | +8% |
| Morocco | 14.8% | +8% |
| Ethiopia | 8.4% | +12% |
| South Africa | 6.4% | +12% |
| Tunisia | 6.1% | +4% |
| Algeria | 5.5% | +4% |
| Kenya | 4.1% | +6% |
| Tanzania | 2.4% | +22% |
| Nigeria | 2.3% | +1% |
| Mauritius | 1.8% | +2% |

# Sub-Saharan Africa: Airlines continue to expand operations

International Flights and Passengers arriving to Sub-Saharan Africa between January and June 2025; vs previous year

## Routes

Worldwide to
Sub-Saharan Africa

1251

**+17** vs previous year

## Top operated Routes:

Dubai <> Addis Ababa
Jeddah <> Addis Ababa
Dubai <> J-burg
Sainte-Marie (RE) <> Port Louis

## Seats

32m

**+5%** vs previous year

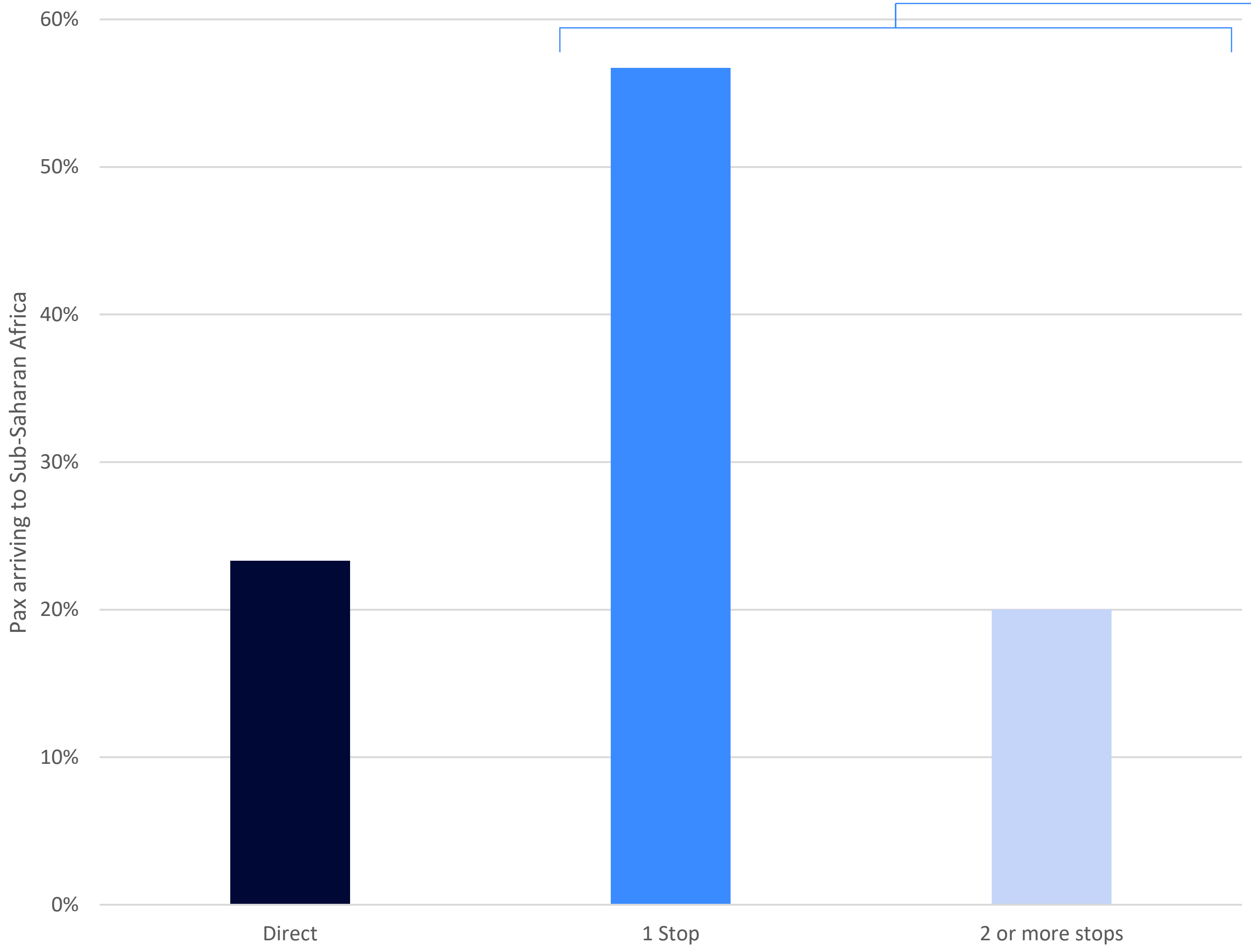




Source: ForwardKeys Air Supply

# Sub-Saharan Africa Focus: Connectivity from Europe

International arrivals to Sub-Saharan Africa from Europe between January and June 2025; vs previous year



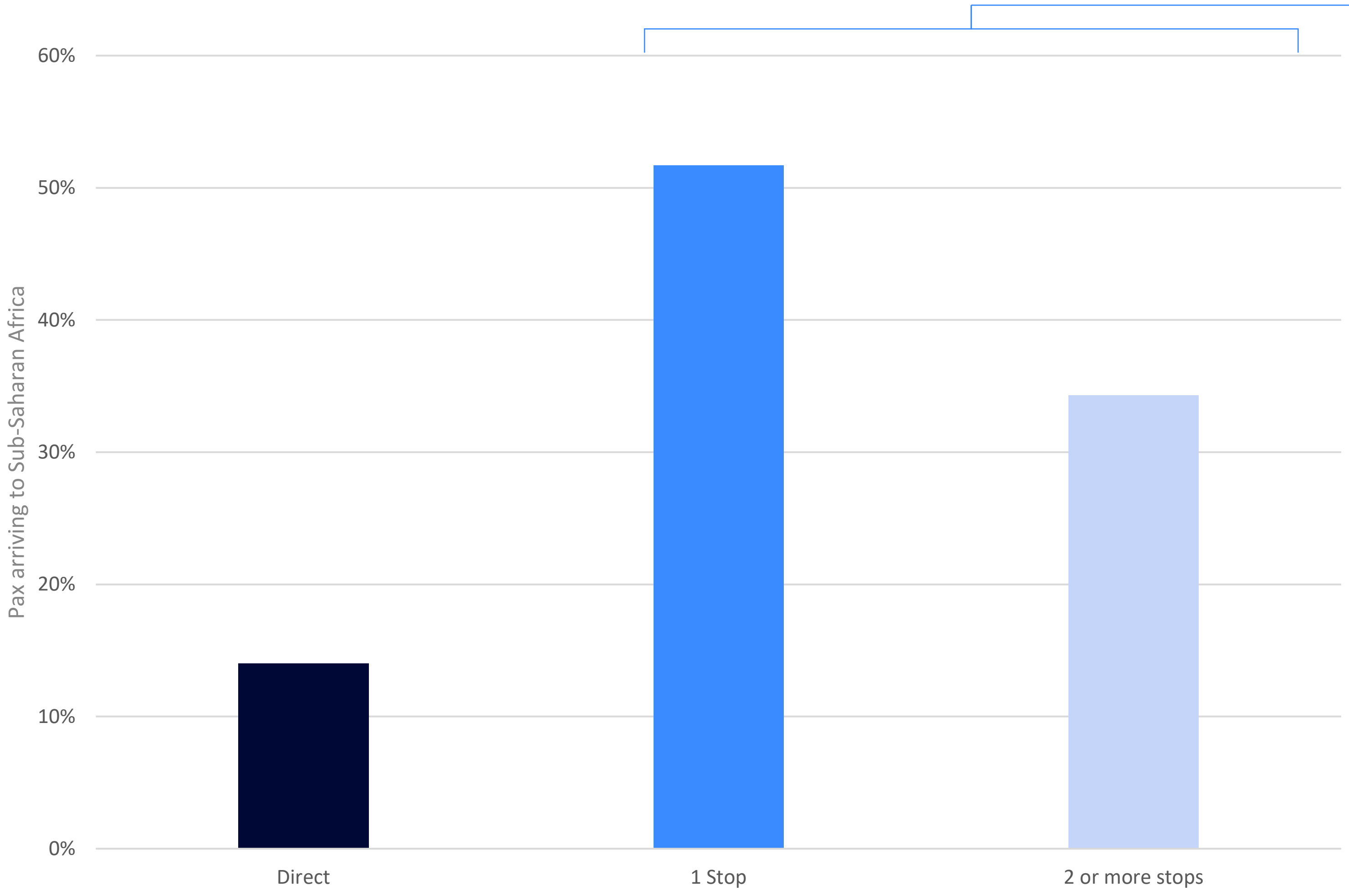

| Top Transfer Hub | % Share |
|---|---|
| Addis Ababa/ADD | 14.9% |
| Dubai/DXB | 9.3% |
| Istanbul/IST | 9.0% |
| Doha/DOH | 6.3% |
| Paris/CDG | 5.8% |



Source: ForwardKeys Air Reservations

# Sub-Saharan Africa Focus: Connectivity from APAC

International arrivals to Sub-Saharan Africa from Asia Pacific between January and June 2025; vs previous year



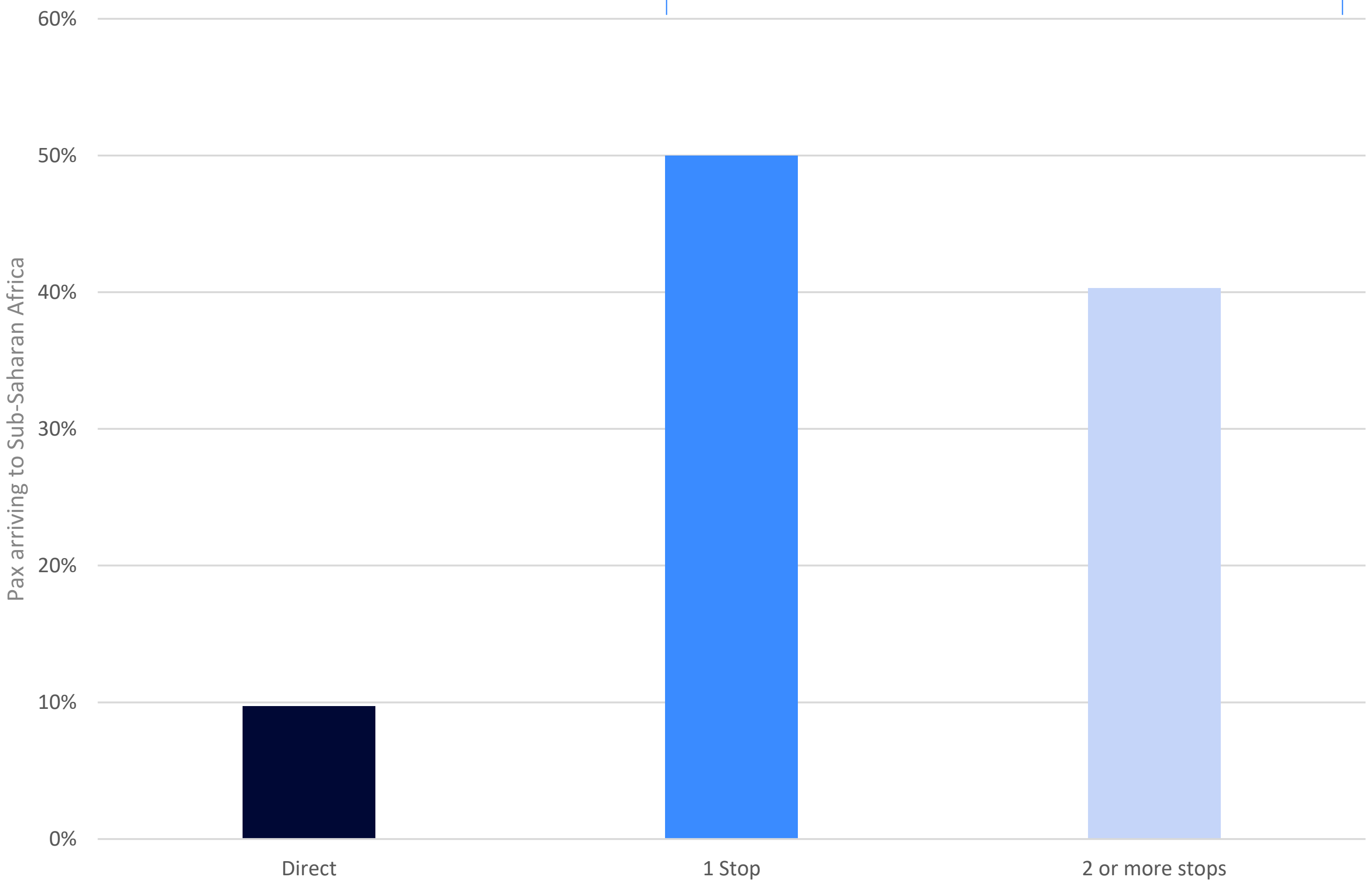

| Top Transfer Hub | % Share |
|---|---|
| Addis Ababa/ADD | 20.3% |
| Dubai/DXB | 19.4% |
| Johannesburg/JNB | 10.5% |
| Doha/DOH | 9.8% |
| Cape Town/CPT | 3.9% |



Source: ForwardKeys Air Reservations

# Sub-Saharan Africa Focus: Connectivity from the Americas

International arrivals to Sub-Saharan Africa from the Americas between January and June 2025; vs previous year




| Top Transfer Hub | % Share |
|---|---|
| Addis Ababa/ADD | 8.7% |
| Paris/CDG | 7.6% |
| Amsterdam/AMS | 7.3% |
| Johannesburg/JNB | 5.9% |
| Istanbul/IST | 4.8% |

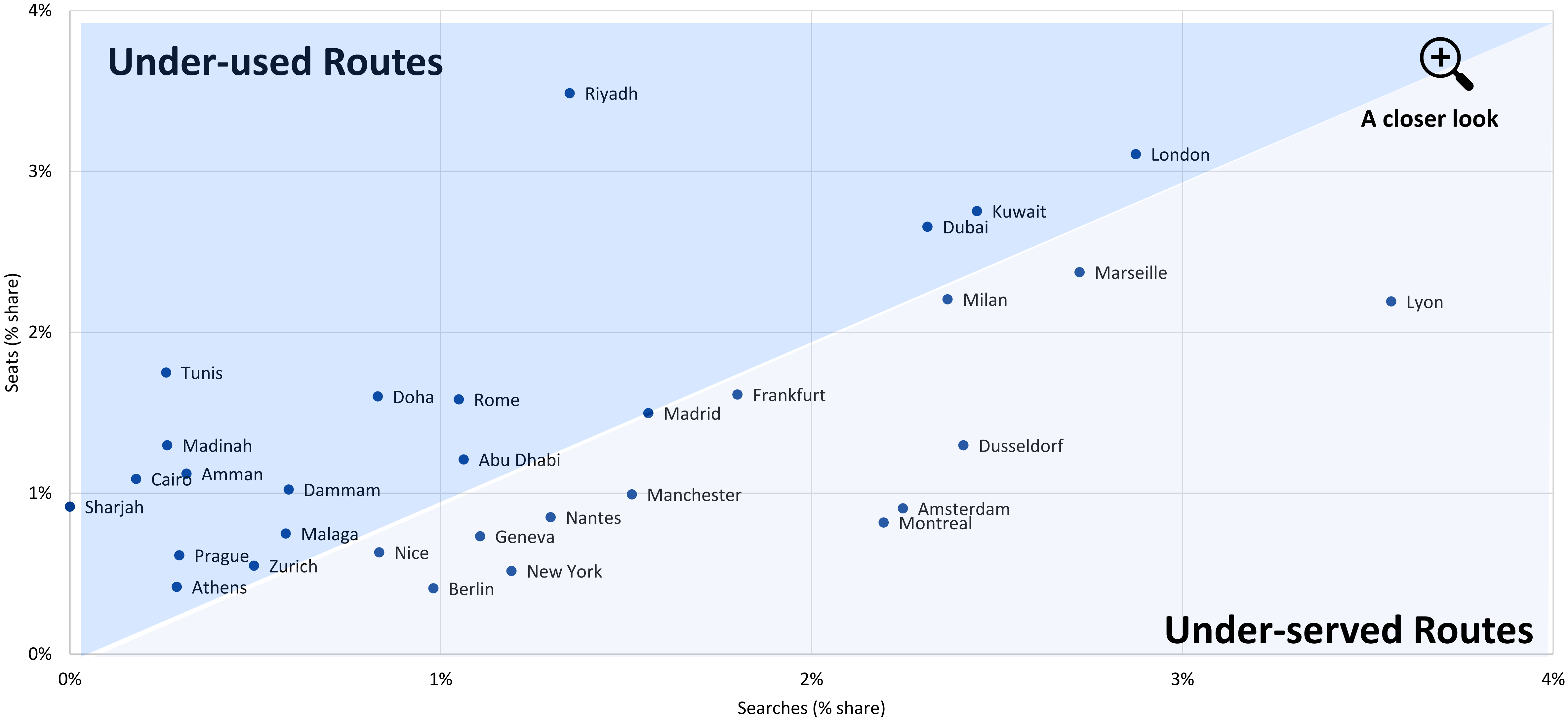


Source: ForwardKeys Air Reservations

# Identifying Opportunities

# Identifying opportunities: Underserved vs underused routes

Seat Capacity and Flight Searches for travel between July and September 2025 to **Northern Africa**








Source: ForwardKeys Air Supply and Flight Searches

# Identifying opportunities: Underserved vs underused routes

Seat Capacity and Flight Searches for travel between July and September 2025 to **Southern Africa**

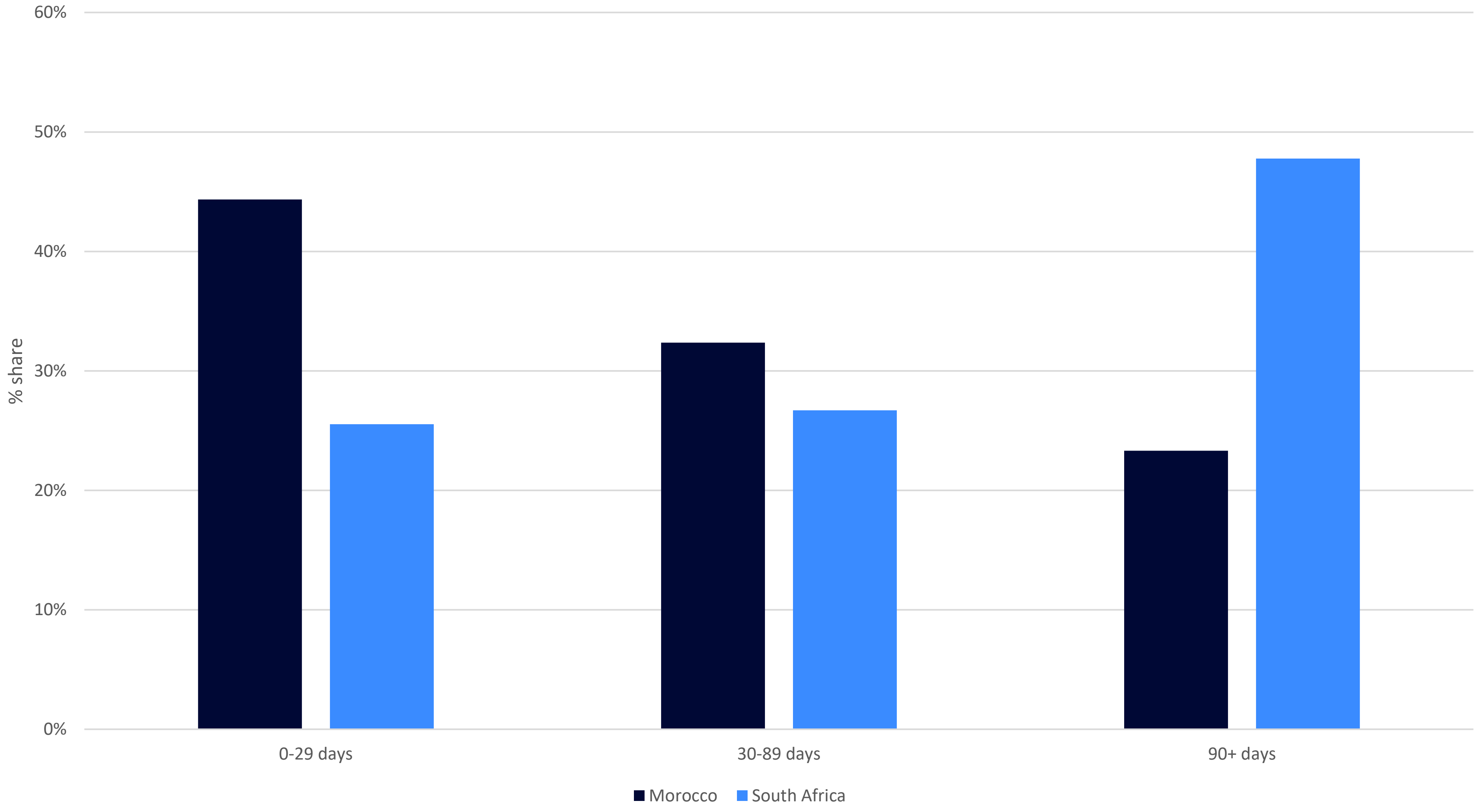





Source: ForwardKeys Air Supply and Flight Searches

# Understanding booking preferences: Difference in leadtimes for French travellers

International arrivals between January and June 2025 from France to key destinations

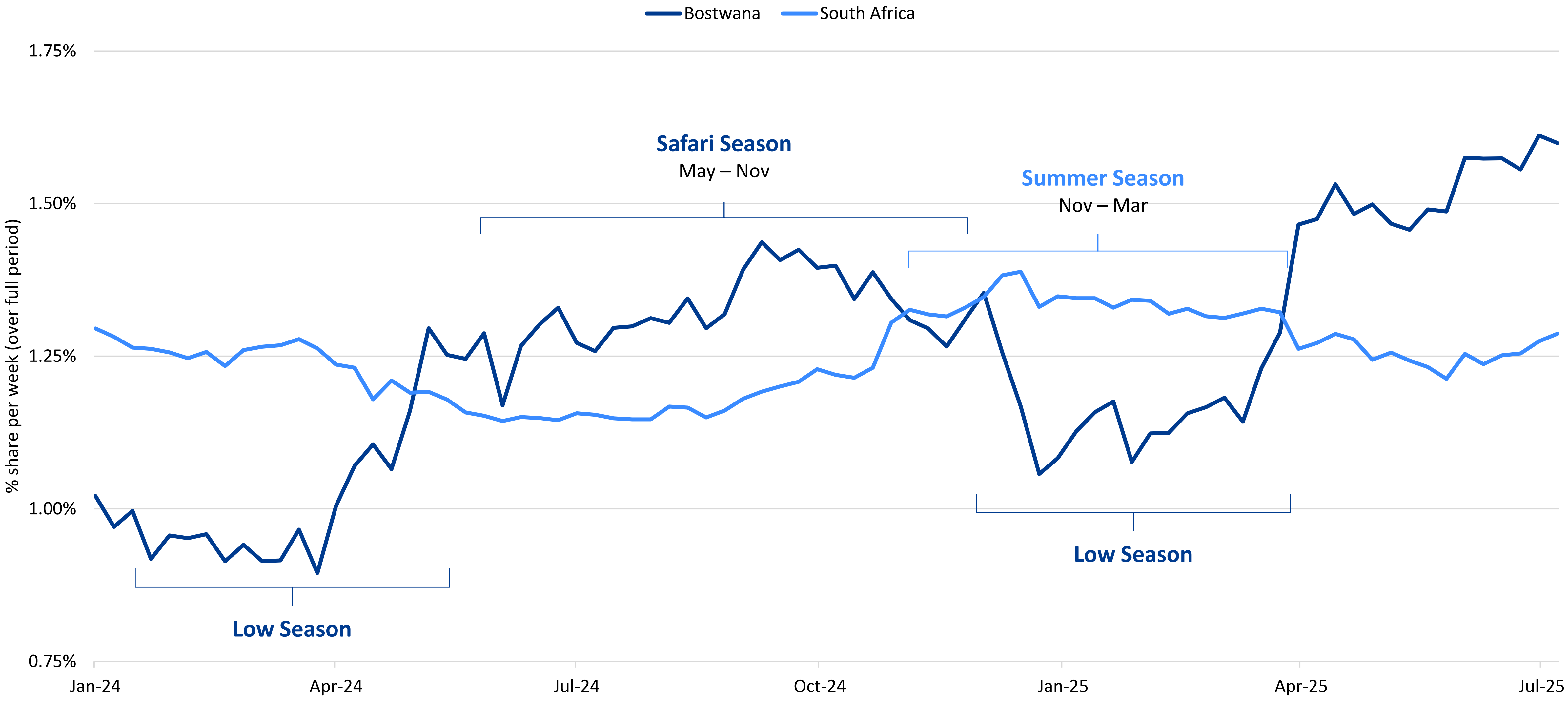





Source: ForwardKeys Air Reservations

# Destination Comparison: Contrasts in seasonal connectivity

Seat Capacity for international flights arriving to Southern and Western Africa in 2024 and 2025



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Source: ForwardKeys Air Supply

# Who visited South Africa in the summer season... and are those markets travelling to Botswana?

International arrivals to South Africa between Nov 2024 and Mar 2025

| Top Origin Markets | % Share South Africa | % Share Botswana |
|---|---|---|
| United Kingdom | 15.5% | 3.2% |
| Germany | 11.6% | 2.7% |
| U.S.A. | 7.1% | 1.6% |
| Zimbabwe | 4.5% | 6.8% |
| Netherlands | 4.2% | <1% |

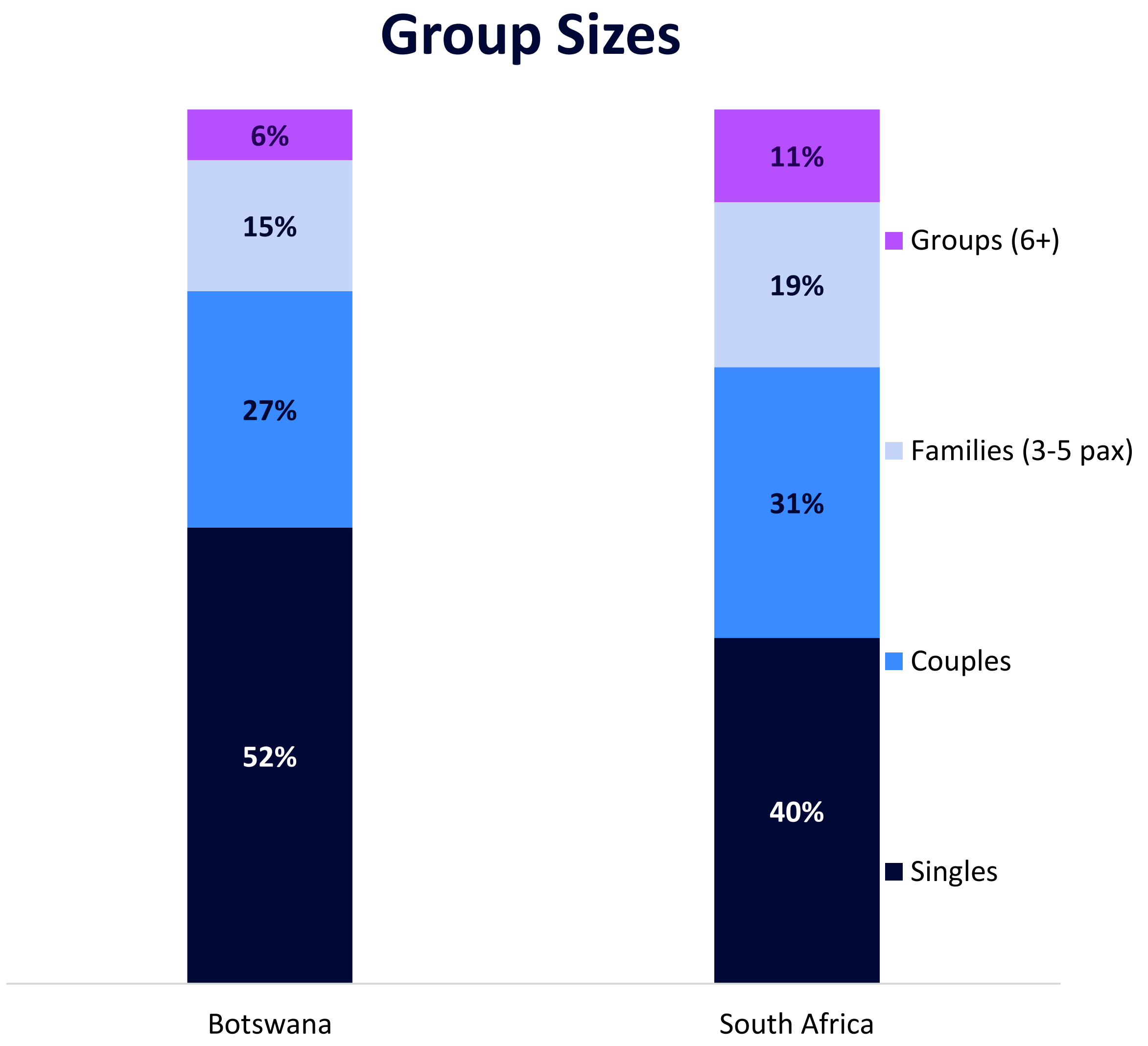


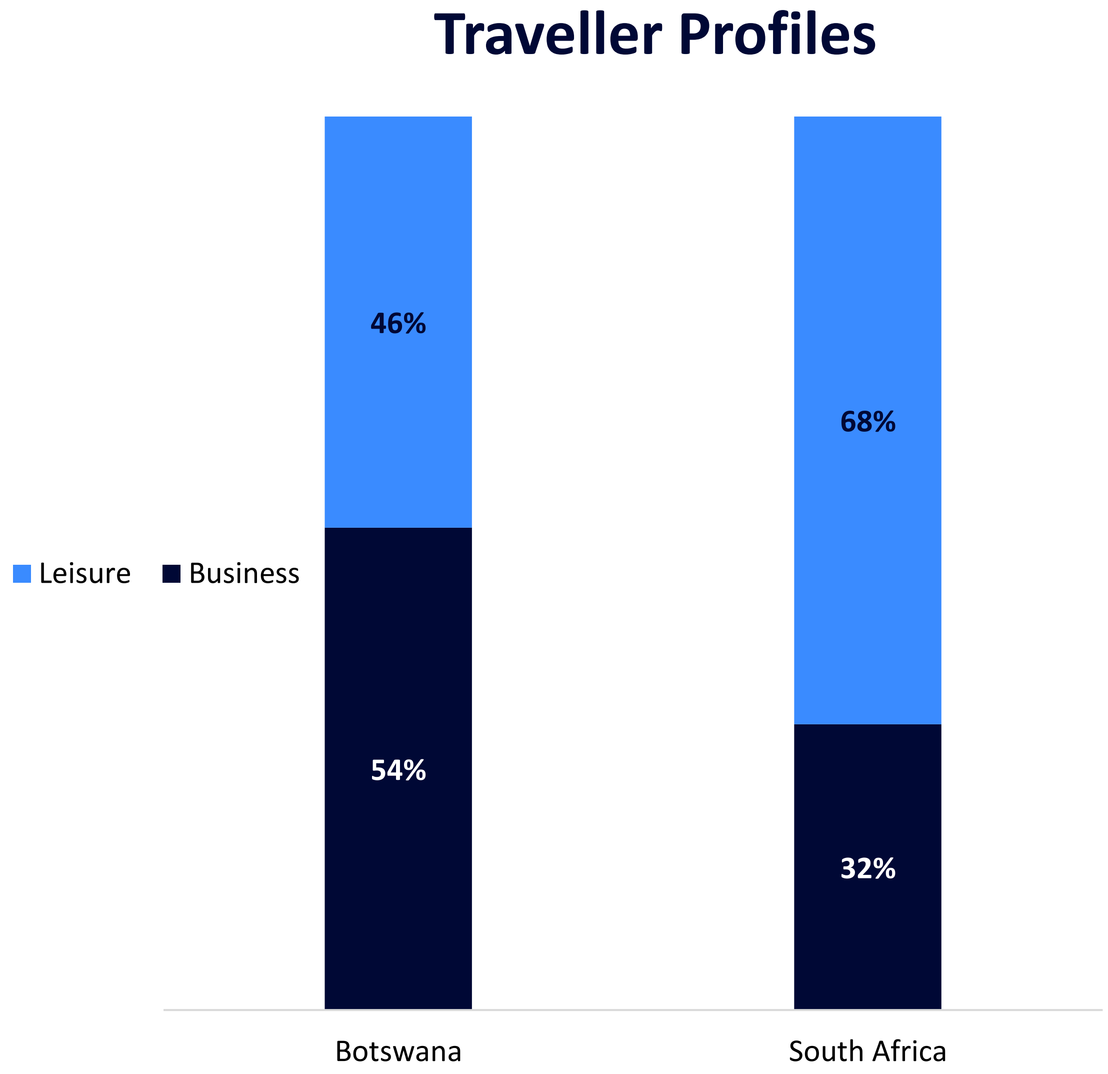


Source: ForwardKeys Total Air Market

# Differences in traveller profiles during the summer season

International arrivals to South Africa between Nov 2024 and Mar 2025








Source: ForwardKeys Total Air Market

# Intent to travel to Botswana during the summer season

Flight Searches made for travel between Nov 2024 and Mar 2025 to Botswana; vs previous year

| Top Performing Origin Markets* | Var vs 2024 | Direct Connections Y/N |
|---|---|---|
| Windhoek/NA | +65% | Y |
| Dublin/IE | +58% | N |
| Durban/ZA | +22% | Y |
| Harare/ZW | +15% | Y |
| New York/US | +12% | N |
| Nairobi/KE | +10% | N |
| Cape Town/ZA | +9% | Y |

**considering destinations that represent more than 1% share*



Source: ForwardKeys Flight Searches & Air Supply

# Take-Aways

1. Strong demand is supported by increased air connectivity
2. Further development of connectivity will unlock potential tourism growth
3. Opportunity in high-search markets that are not converting into bookings
4. The low season is prime time for growth
5. Travel data is critical for smarter decisions

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