Delayed Impact for Africa

Year to date arrivals to world regions *
1 January to 26 April 2020; Year-on-Year variations by region

- Americas YoY Var: -43.9%
- Europe YoY Var: -54.3%
- Africa YoY Var: -43.0%
- Middle East YoY Var: -48.9%
- Asia Pacific YoY Var: -60.5%
- Total Inbound YoY Var: -53.9%

* excluding domestic

Arrivals from 1 January to 26 April 2020 vs same period in 2019. Only considered pax staying 1 to 21 nights at destinations. Source: ForwardKeys air reservation data.
Long-haul arrivals decline across African sub-regions

Year to date arrivals to African regions *
1 January to 26 April 2020; Year-on-Year variations by region

Sub-Saharan Africa
YoY Var: -40.1%
Share: 76%

Northern Africa
YoY Var: -50.7%
Share: 24%

Total Africa
YoY Var: -43.0%

* excluding domestic

Arrivals from 1 January to 26 April 2020 vs same period in 2019. Only considered pax staying 1 to 21 nights at destinations. Source: ForwardKeys air reservation data.
Future travel bookings to Africa plummet -69.5% from January

Bookings made for International travel to Africa by departure region
6 January to 26 April, Year on Year variations

Bookings made
Year to date*
YoY % change

Asia Pacific -93.0%
Europe -70.2%
Americas -78.4%
Africa -58.9%
Middle East -59.2%
Total Global -69.5%

*Bookings made from 6 January to 26 April

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The whole of Africa shares similar trend

Bookings made for International travel to Africa by arrival region
6 January to 26 April, Year on Year variations

- North Africa: -67.0%
- Sub-Saharan Africa: -70.3%
- Total Africa: -69.5%

Introduction of travel restrictions in China
Lombardy COVID-19 outbreak

More cancellations than new bookings

YoY % change

*Bookings made from 6 January to 26 April

Booking made from 6 January to 19 April 2020 vs same period in 2019 for future travel at any time.

Only considered pax staying 1 to 21 nights at destinations.

Source: ForwardKeys air reservation data.
Air capacity continues its decline

Seat Capacity evolution for Worldwide travel from January 2020 Year-to-Date vs the same period in 2019

**The air capacity seats are reported as per the data parameters listed above. They may differ due to the quick changing developments within the aviation sector, including unreported or unfiled seat numbers by airline operators.**

Source: ForwardKeys & Cirium
Africa locks its borders

All countries have implemented some form of restrictions. Only 3 countries with complete border closure.

### Top 10 African destination countries for long-haul travellers** – June, July & August 2020

<table>
<thead>
<tr>
<th>Country</th>
<th>YoY % var</th>
<th>% Share</th>
</tr>
</thead>
<tbody>
<tr>
<td>South Africa</td>
<td>-46.2%</td>
<td>23%</td>
</tr>
<tr>
<td>Tanzania</td>
<td>-37.0%</td>
<td>14%</td>
</tr>
<tr>
<td>Kenya</td>
<td>-42.0%</td>
<td>10%</td>
</tr>
<tr>
<td>Mauritius</td>
<td>-47.8%</td>
<td>8%</td>
</tr>
<tr>
<td>Morocco</td>
<td>-57.4%</td>
<td>7%</td>
</tr>
<tr>
<td>Tunisia</td>
<td>-43.6%</td>
<td>5%</td>
</tr>
<tr>
<td>Namibia</td>
<td>-27.9%</td>
<td>5%</td>
</tr>
<tr>
<td>Seychelles</td>
<td>-44.3%</td>
<td>3%</td>
</tr>
<tr>
<td>Algeria</td>
<td>-53.2%</td>
<td>3%</td>
</tr>
<tr>
<td>Cape Verde</td>
<td>-28.1%</td>
<td>3%</td>
</tr>
</tbody>
</table>

*Northern Hemisphere Summer
**Excludes Inter-African travel

Bookings confirmed as 26 April 2020 vs same period last year, for travel in June – August 2020 vs travel in June – August 2019. Only considered pax staying 1 to 21 nights at destinations. Source: ForwardKeys air reservation data.

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Long haul flight bookings to Africa for travel in June, July and August

The silver lining for Africa - Most bookings for the Summer are made in May- July

Bookings made from 1 June 2019 to 31 March 2020 vs same period last year, for travel in June – August 2020 vs travel in June – August 2019. Only considered pax staying 1 to 21 nights at destinations. Source: ForwardKeys air reservation data.
France’s appetite for travel persists despite being in quarantine!

Breakdown of flight searches from France performed in March for a departure in…

- **Q2**: 60% (2019) vs 50% (2020)
- **Q3**: 30% (2019) vs 40% (2020)
- **Q4**: 10% (2019) vs 10% (2020)

*Source: ForwardKeys Flight Search data.*

Flight searches from 1 to 31 March 2020 vs same period in 2019. Only considered pax staying 1 to 21 nights at destinations.
It is time to be data-driven
GET IN CONTACT!

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