











ForwardKeys and African destinations switching to growth

African destinations switch to growth mode in Q4 2023

International arrivals to Africa in Q4 2023 vs 2019

Fastest growing destinations	Var vs 2019
 Cameroon	+27%
 Rwanda	+15%
 Tanzania	+15%
 Namibia	+10%
 Ivory Coast	+8%
 Congo, Democratic Rep.	+7%
 Cape Verde	+4%
 Nigeria	+1%
 Kenya	-1%
 Mauritius	-4%
TOTAL AFRICA	-13%

Source: ForwardKeys Air Ticket Data.

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Africa should seize the opportunity for direct flights from key source markets searching to travel to Africa. That's according to ForwardKeys, the leading travel intelligence firm and Knowledge Partner of the World Travel and Tourism Council (WTTC).

The company announced the full 2023-year results and Global Travel Trends, using their latest air ticketing data, at the Global Summit in Rwanda.

The analysis shows African destinations entering a growth phase in the last quarter of 2023, with Cameroon (+27% international arrivals compared with 2019), Rwanda (+15%), Tanzania (+15%) and Namibia (+10%) leading the way and boasting double-digit growth.

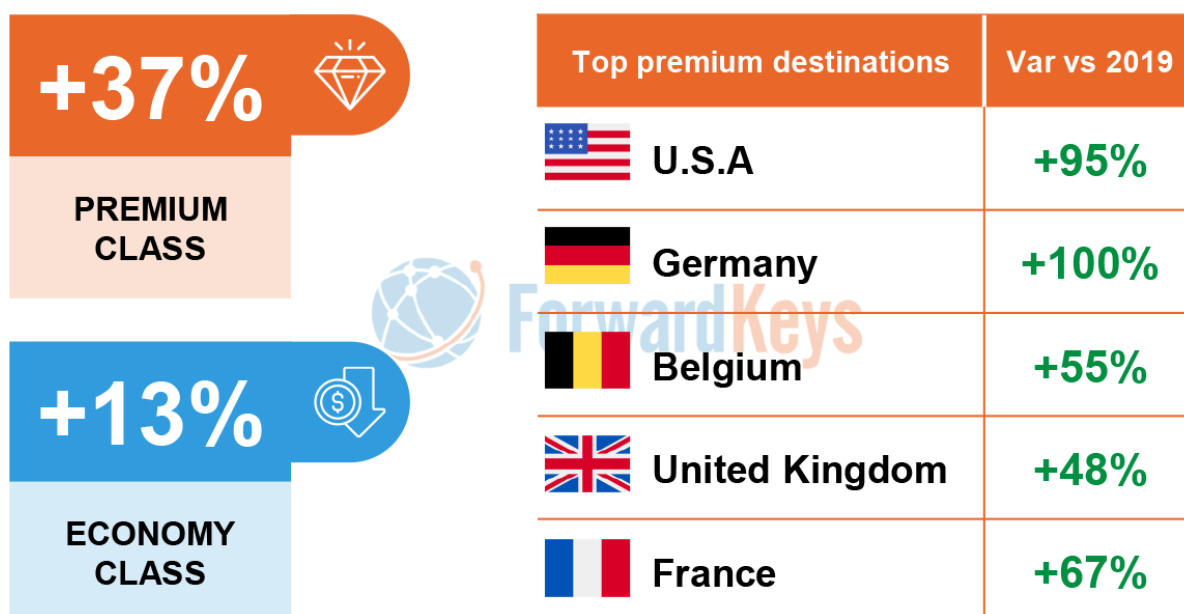
"Most destinations are expected to switch to growth mode during the last quarter of the year, although there is still an uneven recovery amongst countries. Strong demand from the VFR segment is driving the fastest-recovering regions in Central and West Africa. This trend is expected to

continue and accelerate as we head towards the Christmas peak season,” says Olivier Ponti, VP of Insights at ForwardKeys.

WTTC President & CEO Julia Simpson commented, “This latest data from ForwardKeys shows an undeniable appetite for travel to destinations across Africa. These search trends reveal potential new source markets for several African countries and now is the time to seize the opportunities for growth.”

Premium cabin arrivals in Rwanda recover faster

International arrivals to Rwanda by cabin class in Q4 2023; vs 2019



Source: ForwardKeys Air Ticket Data.

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Rwanda is in a good position for business and luxury travel

When discussing business travel to Africa, it's important to note that the industry is still in recovery mode. However, there are some destinations that are performing better than others. Senegal is expected to experience a 22% increase in business travel in Q4, Rwanda 21%, and Cameroon 25%.

Rwanda's recovery of the Meetings, Incentives, Conferences, and Exhibitions (MICE) sector is benefiting the country significantly. This is evident as Rwanda was the third fastest-growing business destination in Africa in Q4. The revival of business travel is a positive sign of increased economic activity and investment in Rwanda. Germany, the United Kingdom, and the USA are the most dynamic source markets for business travel to Rwanda, with growth rates of 30%, 13%, and 11% respectively.

ForwardKeys air ticketing data also shows that the recovery of travel to Rwanda is being driven by passengers traveling in premium cabin classes (+37% in Q4 compared with +13% for economy class). This indicates that there is growing interest from high-end premium travelers who are likely

to spend more on high-end luxury goods and services during their stay at a destination.

Rwanda serves as an excellent example of how improved connectivity could benefit the destination by enhancing the ease of travel. Currently, 70% of international arrivals involve transfer hubs to arrive in Rwanda, mainly Addis Ababa Bole Airport, Brussels Airport, Amsterdam Schiphol Airport and Nairobi Jomo Kenyatta Airport. Further analysis reveals that there is a great business opportunity to increase the number of direct flights, for example from the USA and Germany, as evidenced by the number of flight searches per source market.

ForwardKeys has been at the forefront as a pioneer in championing travel data solutions for the travel and tourism sector. The company offers access to the most comprehensive air travel database in the industry, travel patterns, capacity, bookings, flight searches, ticketing demand, travel intent, sustainable travel, and the behavior and preferences of specific traveler profiles.