Air Connectivity in Africa: Challenges & Opportunities

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Aviation connects African businesses to world markets

Source: SRS Analyzer
But connectivity could be improved across much of Africa

Global Air Connectivity Rank (2017, Sample = 140 countries)

Source: IATA Economics based on SRS Analyzer
Intra-African connectivity is a particular challenge.

Source: IATA Economics based on SRS Analyzer
Fares on Intra-Africa routes are high

Passenger yields and average trip length

Source: IATA Economics based on PaxIS (2016 data)
But load factors aren’t

Passenger yields and average trip length

Source: IATA Economics based on IATA Statistics
Competitiveness performance varies significantly

Air Transport Competitiveness, TTCR 2017 (140 countries)

Source: World Economic Forum
Lack of market access is a key issue

Source: WTO Air Services Agreement Projector
The potential for air travel growth is very significant

Source: IATA, Tourism Economics
Air connectivity facilitates economic activity

Source: Intervistas for IATA & AFCAC
New routes would translate into major time savings

<table>
<thead>
<tr>
<th>Route</th>
<th>Travel Time Before Liberalisation</th>
<th>Travel Time After Liberalisation</th>
<th>Time Saving</th>
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<tbody>
<tr>
<td>Port Elizabeth (South Africa) - Windhoek (Namibia)</td>
<td>5-6 Hours (1-Stop)</td>
<td>2.5 Hours (Direct)</td>
<td>2.5-3.5 Hours</td>
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<tr>
<td>Port Harcourt (Nigeria) - Accra (Ghana)</td>
<td>5 Hours (1-Stop)</td>
<td>1.5 Hours (Direct)</td>
<td>3.5 Hours</td>
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<tr>
<td>Addis Ababa (Ethiopia) - Port Harcourt (Nigeria)</td>
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<td>Cairo (Egypt) - Port Harcourt (Nigeria)</td>
<td>9-12 Hours (1-Stop)</td>
<td>5.5 Hours (Direct)</td>
<td>3.5-6.5 Hours</td>
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<tr>
<td>Dakar (Senegal) - Abuja (Nigeria)</td>
<td>6-7 Hours (1-Stop)</td>
<td>4 Hours (Direct)</td>
<td>2-3 Hours</td>
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<td>Luanda (Angola) - Durban (South Africa)</td>
<td>6-7 Hours (1-Stop)</td>
<td>3.5-4.0 Hours (Direct)</td>
<td>2.5-3.5 Hours</td>
</tr>
</tbody>
</table>

Source: Intervistas for IATA & AFCAC
National economies would see significant benefits

Source: Intervistas for IATA & AFCAC
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