



Air Passenger Forecasts
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Global report

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Top markets, ranked by passenger numbers, 2014-2034

Rank	Country	Passenger numbers ('000s)				CAGR %		
		2014	2019	2024	2034	5 year 2014-2019	10 year 2014-2024	20 year 2014-2034
1	Canada	1,281	1,519	1,802	2,533	3.5%	3.5%	3.5%
2	US	1,277	1,553	1,890	2,797	4.0%	4.0%	4.0%
3	Brazil	1,242	1,471	1,742	2,443	3.4%	3.4%	3.4%
4	Indonesia	1,179	1,434	1,744	2,582	4.0%	4.0%	4.0%
5	Philippines	1,155	1,391	1,675	2,428	3.8%	3.8%	3.8%
6	China	1,151	1,401	1,704	2,523	4.0%	4.0%	4.0%
7	Saudi Arabia	1,093	1,330	1,617	2,394	4.0%	4.0%	4.0%
8	India	1,032	1,218	1,437	2,000	3.4%	3.4%	3.4%
9	Korea	1,002	1,194	1,423	2,021	3.6%	3.6%	3.6%
10	Malaysia	981	1,183	1,426	2,074	3.8%	3.8%	3.8%
11	France	949	1,048	1,157	1,410	2.0%	2.0%	2.0%
12	Russia	930	1,107	1,319	1,870	3.6%	3.6%	3.6%
13	Italy	905	1,101	1,340	1,983	4.0%	4.0%	4.0%
14	Spain	863	1,047	1,270	1,870	3.9%	3.9%	3.9%
15	UK	819	861	905	1,000	1.0%	1.0%	1.0%
16	Germany	805	952	1,127	1,577	3.4%	3.4%	3.4%
17	Turkey	788	940	1,122	1,599	3.6%	3.6%	3.6%
18	Singapore	785	949	1,148	1,681	3.9%	3.9%	3.9%
19	Hong Kong	780	920	1,085	1,511	3.4%	3.4%	3.4%
20	Mexico	766	917	1,099	1,577	3.7%	3.7%	3.7%



The World air passenger market is forecast to grow by 3.9% per annum, the equivalent of 0 billion additional passengers over the 20 year period,

The biggest three markets in 2014 are Canada, the US and Brazil, while in 2034 they are forecast to become the US, Indonesia and Canada respectively.

The largest riser in the 20 year period is forecast to be Australia rising 4 places to be ranked 19th largest market in 2034.

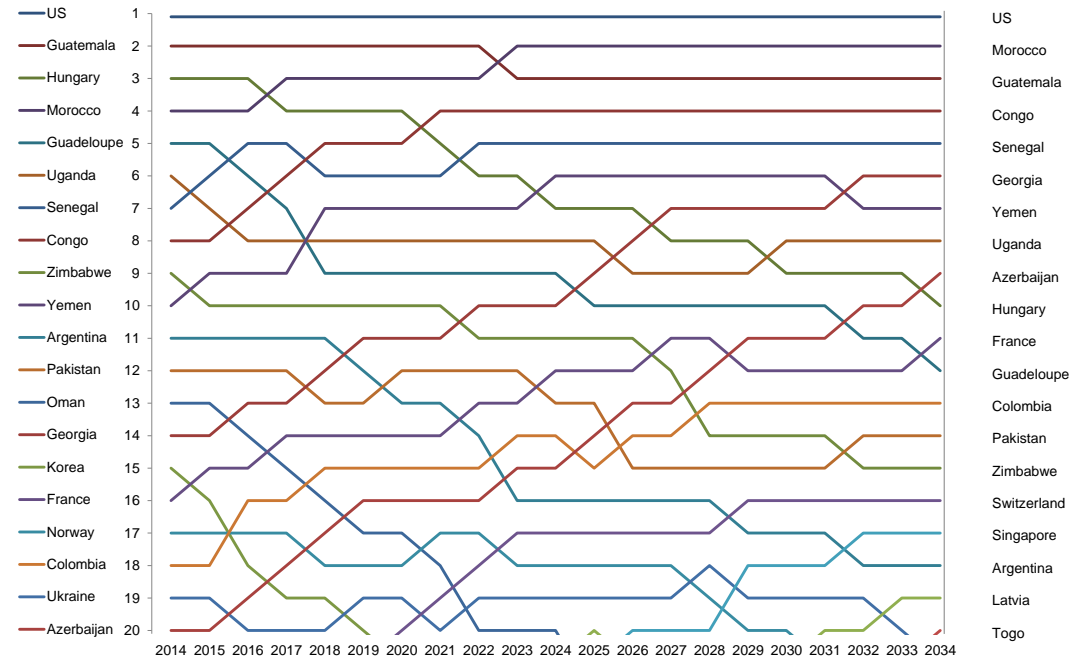
Whilst the biggest faller in the period 2014-2034 is forecast to be France falling 9 places to be ranked 20th largest market in 2034.

Scenario 1 presents a more optimistic outlook for air passenger growth over the next 20 years. This scenario, which considers a relaxing of regulations, particularly in the emerging markets, could add 0 billion passengers on top of our baseline by 2034. This would see an average annual growth rate of 5.6% between 2014-2034.

We have also considered a second scenario based on a pick-up in protectionism. On this basis, we forecast a withdrawal of 0 billion passengers from our baseline by 2034, leaving growth at 1.4% per year over the 20 year period.

Top domestic markets, ranked by passenger numbers, 2014-2034

Rank	Country	Passenger numbers ('000s)				CAGR %		
		2014	2019	2024	2034	5 year 2014-2019	10 year 2014-2024	20 year 2014-2034
1	Within US	292	345	409	574	3.4%	3.4%	3.4%
2	Within Guatemala	137	163	195	279	3.6%	3.6%	3.6%
3	Within Hungary	135	159	188	261	3.4%	3.4%	3.4%
4	Within Morocco	133	162	196	289	3.9%	3.9%	3.9%
5	Within Guadeloupe	132	156	185	260	3.5%	3.5%	3.5%
6	Within Uganda	131	156	186	263	3.5%	3.5%	3.5%
7	Within Senegal	131	158	190	275	3.8%	3.8%	3.8%
8	Within Congo	131	158	191	278	3.9%	3.9%	3.9%
9	Within Zimbabwe	131	154	182	253	3.4%	3.4%	3.4%
10	Within Yemen	130	157	188	270	3.7%	3.7%	3.7%
11	Within Argentina	129	151	177	243	3.2%	3.2%	3.2%
12	Within Pakistan	127	151	180	254	3.5%	3.5%	3.5%
13	Within Oman	127	147	170	229	3.0%	3.0%	3.0%
14	Within Georgia	125	152	185	272	4.0%	4.0%	4.0%
15	Within Korea	125	145	168	227	3.1%	3.1%	3.1%
16	Within France	124	149	180	260	3.8%	3.8%	3.8%
17	Within Norway	124	146	173	240	3.4%	3.4%	3.4%
18	Within Colombia	123	148	179	260	3.8%	3.8%	3.8%
19	Within Ukraine	122	145	172	242	3.5%	3.5%	3.5%
20	Within Azerbaijan	122	147	179	262	3.9%	3.9%	3.9%



The biggest three domestic markets in 2014 are the US, Guatemala and Hungary, while in 2034 they are forecast to become the US, Morocco and Guatemala respectively.

The largest riser in the 20 year period is forecast to be Singapore rising 12 places to be ranked 17th largest market in 2034.

Whilst the biggest faller in the period 2014-2034 is forecast to be Hungary falling 7 places to be ranked 10th largest market in 2034.

Amongst the top 10 domestic markets, the largest change can be observed in Congo which moves up 4 places from 8th to 4th place.

Towards the lower end of the table (ranks 11th-20th), a lot more volatility can be observed. Our forecast indicates that 3 of the markets appearing in the top 20 in 2014 will fall out of this table completely (Ukraine, Korea and Oman) to be replaced by new markets (Latvia, Switzerland and Singapore).

Top international markets, ranked by passenger numbers, 2014-2034

Rank	Country	Passenger numbers ('000s)				CAGR %		
		2014	2019	2024	2034	5 year 2014-2019	10 year 2014-2024	20 year 2014-2034
1	US - Canada	673	806	965	1,385	3.7%	3.7%	3.7%
2	US - Kazakhstan	672	801	955	1,359	3.6%	3.6%	3.6%
3	US - Italy	655	769	902	1,243	3.3%	3.3%	3.3%
4	US - Chinese Taipei	643	766	914	1,300	3.6%	3.6%	3.6%
5	US - Spain	632	769	935	1,385	4.0%	4.0%	4.0%
6	US - Sweden	626	728	847	1,145	3.1%	3.1%	3.1%
7	US - Norway	619	738	879	1,247	3.6%	3.6%	3.6%
8	US - Pakistan	585	697	831	1,180	3.6%	3.6%	3.6%
9	US - Poland	548	645	760	1,055	3.3%	3.3%	3.3%
10	US - Korea	545	649	772	1,093	3.5%	3.5%	3.5%
11	US - UK	538	641	764	1,083	3.6%	3.6%	3.6%
12	US - New Zealand	523	635	770	1,132	3.9%	3.9%	3.9%
13	US - Colombia	511	606	719	1,011	3.5%	3.5%	3.5%
14	US - Thailand	484	570	670	928	3.3%	3.3%	3.3%
15	US - Philippines	469	545	632	852	3.0%	3.0%	3.0%
16	US - Japan	463	545	642	890	3.3%	3.3%	3.3%
17	US - Iran	449	530	625	871	3.4%	3.4%	3.4%
18	US - South Africa	444	515	597	803	3.0%	3.0%	3.0%
19	US - Ireland	435	526	637	934	3.9%	3.9%	3.9%
20	US - France	427	499	583	798	3.2%	3.2%	3.2%



The largest country pair in 2014 is US - Canada, with 0.6 million passengers travelling between these markets in 2014. This country pair is forecast to retain the top spot throughout the forecast period, and by 2034 an estimated 1.4 million passengers are forecast to travel between these markets.

The biggest three country pairs in 2014 are the US - Canada, the US - Kazakhstan and the US - Italy, while in 2034 they are forecast to become the US - Canada, the US - Spain and the US - Kazakhstan respectively.

The largest riser in the 20 year period is forecast to be US - Laos rising 5 places to be ranked 20th largest market in 2034.

Whilst the biggest faller in the period 2014-2034 is forecast to be US - Philippines falling 6 places to be ranked 21st largest market in 2034.

Strong growth is expected in Europe over the next 20 years, mostly coming from German routes. In particular, the largest risers in ranking terms globally are forecast to be Germany - Ireland, Germany - France and Germany - Italy, which are forecast to rise by 34, 11 and 9 places over the 20 year period respectively.

Global - Largest Gaining Country Pairs

Country pairs with the biggest changes in passenger numbers (2014 - 2034)

Domestic				International country pairs only			
Rank	Domestic markets	Additional passengers per year by 2034 ('000s)	CAGR %	Rank	Country pair	Additional passengers per year by 2034 ('000s)	CAGR %
1	Within Ireland	1,466	10.0%	1	Russia - India	1,084	27.3%
2	Within France	1,331	2.3%	2	Indonesia - India	1,021	2.4%
3	Within India	1,099	3.1%	3	Hong Kong - Gambia	1,003	90.3%
4	Within UAE	909	5.7%	4	South Africa - Chad	976	55.1%
5	Within Iraq	879	8.7%	5	Singapore - Mozambique	761	81.7%
6	Within Japan	827	6.4%	6	Netherlands - Sudan	629	22.0%
7	Within Togo	734	6.5%	7	Morocco - Chad	544	19.6%
8	Within Chad	667	7.8%	8	Ghana - France	512	92.9%
9	Within Congo	625	2.4%	9	Indonesia - Barbados	475	44.4%
10	Within Vietnam	621	2.9%	10	Hungary - Macau	470	24.4%
11	Within New Zealand	573	9.6%	11	UAE - Suriname	417	71.7%
12	Within Canada	402	4.5%	12	Korea - Belarus	327	0.5%
13	Within Malaysia	331	4.4%	13	Hong Kong - Tajikistan	244	68.5%
14	Within Korea	304	4.3%	14	Indonesia - Japan	224	51.5%
15	Within Japan	302	3.1%	15	Uganda - Barbados	217	49.8%
16	Within Russia	251	3.3%	16	Spain - Jordan	206	93.2%
17	Within Spain	242	2.2%	17	United Arab Emirates - Mali	173	31.4%
18	Within Thailand	229	2.7%	18	Saudi Arabia - Hong Kong	151	2.7%
19	Within Saudi Arabia	217	2.0%	19	France - Swaziland	147	31.7%
20	Within Pakistan	140	9.7%	20	Australia - Laos	105	38.4%

The fastest growing country pairs*

Rank	Country pair	CAGR %	Additional passengers per year by 2034 ('000s)
1	Japan - Cyprus	78.0%	149
2	Hong Kong - Ireland	35.8%	397
3	Russia - Egypt	30.0%	200
4	Germany - Korea	29.8%	199
5	Austria - Brazil	20.2%	196
6	Turkey - Brazil	19.5%	497
7	Mexico - Singapore	18.2%	443
8	US - France	10.0%	246
9	Spain - Canada	18.1%	232
10	Spain - Japan	18.0%	278
11	Turkey - Philippines	16.3%	123
12	Singapore - Italy	15.7%	143
13	Australia - UK	14.8%	376
14	Saudi Arabia - France	14.3%	100
15	Russia - Malaysia	13.5%	282
16	Saudi Arabia - Thailand	13.0%	326
17	UK - Singapore	12.3%	145
18	Spain - Russia	12.2%	370
19	Brazil - Kazakhstan	11.6%	259
20	Russia - Spain	10.9%	119

*Filtered to only show those country pairs expected to see at least an additional 500 thousand passengers per year by 2034.

Global - Annual Outlook (%)

To/from the World

Note: full access to our forecast database is available through our online webtool. Please contact us for more details (contact details can be found on the Glossary tab).

Annual % change	2013	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024	2025	2026	2027	2028	2029	2030	2031	2032	2033	2034
	Actual								Forecast													
Total	3.9%	3.9%	3.9%	3.9%	3.9%	3.9%	3.9%	3.9%	3.9%	3.9%	3.9%	3.9%	3.9%	3.9%	3.9%	3.9%	3.9%	3.9%	3.9%	3.9%	3.9%	3.9%
North America	3.9%	3.9%	3.9%	3.9%	3.9%	3.9%	3.9%	3.9%	3.9%	3.9%	3.9%	3.9%	3.9%	3.9%	3.9%	3.9%	3.9%	3.9%	3.9%	3.9%	3.9%	3.9%
Canada	3.5%	3.5%	3.5%	3.5%	3.5%	3.5%	3.5%	3.5%	3.5%	3.5%	3.5%	3.5%	3.5%	3.5%	3.5%	3.5%	3.5%	3.5%	3.5%	3.5%	3.5%	3.5%
United States	4.0%	4.0%	4.0%	4.0%	4.0%	4.0%	4.0%	4.0%	4.0%	4.0%	4.0%	4.0%	4.0%	4.0%	4.0%	4.0%	4.0%	4.0%	4.0%	4.0%	4.0%	4.0%
Europe	3.4%	3.4%	3.4%	3.4%	3.4%	3.4%	3.4%	3.4%	3.4%	3.4%	3.4%	3.4%	3.4%	3.4%	3.4%	3.4%	3.4%	3.4%	3.4%	3.4%	3.4%	3.4%
Germany	3.4%	3.4%	3.4%	3.4%	3.4%	3.4%	3.4%	3.4%	3.4%	3.4%	3.4%	3.4%	3.4%	3.4%	3.4%	3.4%	3.4%	3.4%	3.4%	3.4%	3.4%	3.4%
France	2.0%	2.0%	2.0%	2.0%	2.0%	2.0%	2.0%	2.0%	2.0%	2.0%	2.0%	2.0%	2.0%	2.0%	2.0%	2.0%	2.0%	2.0%	2.0%	2.0%	2.0%	2.0%
Italy	4.0%	4.0%	4.0%	4.0%	4.0%	4.0%	4.0%	4.0%	4.0%	4.0%	4.0%	4.0%	4.0%	4.0%	4.0%	4.0%	4.0%	4.0%	4.0%	4.0%	4.0%	4.0%
UK	1.0%	1.0%	1.0%	1.0%	1.0%	1.0%	1.0%	1.0%	1.0%	1.0%	1.0%	1.0%	1.0%	1.0%	1.0%	1.0%	1.0%	1.0%	1.0%	1.0%	1.0%	1.0%
Russia	3.6%	3.6%	3.6%	3.6%	3.6%	3.6%	3.6%	3.6%	3.6%	3.6%	3.6%	3.6%	3.6%	3.6%	3.6%	3.6%	3.6%	3.6%	3.6%	3.6%	3.6%	3.6%
Asia	3.8%	3.8%	3.8%	3.8%	3.8%	3.8%	3.8%	3.8%	3.8%	3.8%	3.8%	3.8%	3.8%	3.8%	3.8%	3.8%	3.8%	3.8%	3.8%	3.8%	3.8%	3.8%
Japan	1.0%	1.0%	1.0%	1.0%	1.0%	1.0%	1.0%	1.0%	1.0%	1.0%	1.0%	1.0%	1.0%	1.0%	1.0%	1.0%	1.0%	1.0%	1.0%	1.0%	1.0%	1.0%
China	4.0%	4.0%	4.0%	4.0%	4.0%	4.0%	4.0%	4.0%	4.0%	4.0%	4.0%	4.0%	4.0%	4.0%	4.0%	4.0%	4.0%	4.0%	4.0%	4.0%	4.0%	4.0%
India	3.4%	3.4%	3.4%	3.4%	3.4%	3.4%	3.4%	3.4%	3.4%	3.4%	3.4%	3.4%	3.4%	3.4%	3.4%	3.4%	3.4%	3.4%	3.4%	3.4%	3.4%	3.4%
Indonesia	4.0%	4.0%	4.0%	4.0%	4.0%	4.0%	4.0%	4.0%	4.0%	4.0%	4.0%	4.0%	4.0%	4.0%	4.0%	4.0%	4.0%	4.0%	4.0%	4.0%	4.0%	4.0%
Latin America	3.6%	3.6%	3.6%	3.6%	3.6%	3.6%	3.6%	3.6%	3.6%	3.6%	3.6%	3.6%	3.6%	3.6%	3.6%	3.6%	3.6%	3.6%	3.6%	3.6%	3.6%	3.6%
Brazil	3.4%	3.4%	3.4%	3.4%	3.4%	3.4%	3.4%	3.4%	3.4%	3.4%	3.4%	3.4%	3.4%	3.4%	3.4%	3.4%	3.4%	3.4%	3.4%	3.4%	3.4%	3.4%
Mexico	3.7%	3.7%	3.7%	3.7%	3.7%	3.7%	3.7%	3.7%	3.7%	3.7%	3.7%	3.7%	3.7%	3.7%	3.7%	3.7%	3.7%	3.7%	3.7%	3.7%	3.7%	3.7%
Middle East	3.7%	3.7%	3.7%	3.7%	3.7%	3.7%	3.7%	3.7%	3.7%	3.7%	3.7%	3.7%	3.7%	3.7%	3.7%	3.7%	3.7%	3.7%	3.7%	3.7%	3.7%	3.7%
Saudi Arabia	4.0%	4.0%	4.0%	4.0%	4.0%	4.0%	4.0%	4.0%	4.0%	4.0%	4.0%	4.0%	4.0%	4.0%	4.0%	4.0%	4.0%	4.0%	4.0%	4.0%	4.0%	4.0%
UAE	3.0%	3.0%	3.0%	3.0%	3.0%	3.0%	3.0%	3.0%	3.0%	3.0%	3.0%	3.0%	3.0%	3.0%	3.0%	3.0%	3.0%	3.0%	3.0%	3.0%	3.0%	3.0%
Africa	3.6%	3.6%	3.6%	3.6%	3.6%	3.6%	3.6%	3.6%	3.6%	3.6%	3.6%	3.6%	3.6%	3.6%	3.6%	3.6%	3.6%	3.6%	3.6%	3.6%	3.6%	3.6%
Nigeria	3.4%	3.4%	3.4%	3.4%	3.4%	3.4%	3.4%	3.4%	3.4%	3.4%	3.4%	3.4%	3.4%	3.4%	3.4%	3.4%	3.4%	3.4%	3.4%	3.4%	3.4%	3.4%
South Africa	4.0%	4.0%	4.0%	4.0%	4.0%	4.0%	4.0%	4.0%	4.0%	4.0%	4.0%	4.0%	4.0%	4.0%	4.0%	4.0%	4.0%	4.0%	4.0%	4.0%	4.0%	4.0%



Global - Annual Outlook (Passenger numbers)

To/from the World

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Passenger numbers ('000s)	2013	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024	2025	2026	2027	2028	2029	2030	2031	2032	2033	2034
	Actual								Forecast													
Total	12,252	12,727	13,221	13,733	14,266	14,819	15,393	15,990	16,610	17,254	17,923	18,617	19,339	20,089	20,868	21,677	22,517	23,390	24,297	25,239	26,217	27,233
North America	1,600	1,663	1,727	1,795	1,864	1,937	2,012	2,091	2,172	2,257	2,344	2,436	2,531	2,629	2,731	2,838	2,948	3,063	3,182	3,306	3,435	3,569
Canada	1,238	1,281	1,326	1,372	1,419	1,469	1,519	1,572	1,627	1,683	1,741	1,802	1,864	1,929	1,995	2,065	2,136	2,210	2,287	2,366	2,448	2,533
United States	1,228	1,277	1,328	1,381	1,436	1,494	1,553	1,615	1,680	1,747	1,817	1,890	1,965	2,044	2,126	2,211	2,299	2,391	2,487	2,586	2,690	2,797
Europe	1,322	1,367	1,414	1,462	1,512	1,563	1,616	1,671	1,728	1,787	1,848	1,910	1,975	2,042	2,112	2,184	2,258	2,335	2,414	2,496	2,581	2,669
Germany	778	805	833	861	890	921	952	985	1,019	1,053	1,089	1,127	1,165	1,205	1,246	1,289	1,333	1,378	1,425	1,474	1,524	1,577
France	930	949	968	987	1,007	1,027	1,048	1,069	1,090	1,112	1,134	1,157	1,180	1,203	1,228	1,252	1,277	1,303	1,329	1,355	1,382	1,410
Italy	870	905	941	979	1,018	1,059	1,101	1,145	1,191	1,239	1,288	1,340	1,394	1,449	1,507	1,568	1,630	1,695	1,763	1,834	1,907	1,983
UK	811	819	827	836	844	852	861	870	878	887	896	905	914	923	932	942	951	961	970	980	990	1,000
Russia	898	930	963	997	1,033	1,069	1,107	1,147	1,187	1,230	1,273	1,319	1,366	1,414	1,464	1,516	1,570	1,626	1,684	1,744	1,806	1,870
Asia	1,504	1,561	1,619	1,681	1,744	1,810	1,878	1,949	2,023	2,099	2,178	2,260	2,346	2,434	2,526	2,621	2,720	2,823	2,930	3,040	3,155	3,274
Japan	755	762	770	778	785	793	801	809	817	825	834	842	850	859	868	876	885	894	903	912	921	930
China	1,107	1,151	1,198	1,245	1,295	1,347	1,401	1,457	1,515	1,576	1,639	1,704	1,773	1,844	1,917	1,994	2,074	2,157	2,243	2,333	2,426	2,523
India	998	1,032	1,067	1,102	1,140	1,178	1,218	1,259	1,301	1,345	1,390	1,437	1,485	1,535	1,587	1,640	1,695	1,752	1,811	1,872	1,935	2,000
Indonesia	1,133	1,179	1,226	1,275	1,326	1,379	1,434	1,491	1,551	1,613	1,677	1,744	1,814	1,887	1,962	2,041	2,122	2,207	2,296	2,387	2,483	2,582
Latin America	1,927	1,997	2,069	2,145	2,223	2,304	2,388	2,475	2,565	2,658	2,755	2,856	2,960	3,067	3,179	3,295	3,415	3,539	3,668	3,802	3,940	4,084
Brazil	1,201	1,242	1,285	1,329	1,375	1,422	1,471	1,521	1,574	1,628	1,684	1,742	1,802	1,864	1,928	1,994	2,063	2,134	2,207	2,283	2,362	2,443
Mexico	738	766	794	823	853	885	917	951	986	1,022	1,060	1,099	1,139	1,181	1,224	1,270	1,316	1,365	1,415	1,467	1,521	1,577
Middle East	1,769	1,834	1,902	1,971	2,044	2,119	2,197	2,277	2,361	2,448	2,537	2,631	2,727	2,827	2,931	3,039	3,150	3,266	3,386	3,510	3,639	3,773
Saudi Arabia	1,051	1,093	1,137	1,182	1,229	1,278	1,330	1,383	1,438	1,495	1,555	1,617	1,682	1,749	1,819	1,892	1,968	2,046	2,128	2,213	2,302	2,394
UAE	713	734	756	779	803	827	853	878	905	933	961	990	1,020	1,051	1,083	1,116	1,150	1,185	1,221	1,258	1,296	1,335
Africa	1,818	1,883	1,950	2,020	2,092	2,167	2,244	2,324	2,407	2,493	2,581	2,673	2,769	2,867	2,970	3,076	3,185	3,299	3,416	3,538	3,664	3,795
Nigeria	89	92	95	98	101	105	108	112	116	120	124	128	132	137	141	146	151	156	162	167	173	179
South Africa	20	21	22	23	24	25	26	27	28	29	30	31	33	34	35	37	38	40	41	43	44	46

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Global - Annual Scenario 1 Outlook (%)

A Relaxing of Regulations; The fractious political landscapes in the developed world slowly begin to improve paving the way for faster adoption of required structural reforms while the brighter economic backdrop spreads to the emerging markets bringing the issue of air market liberalisation higher up the domestic agendas.

To/from the World

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Annual % change	2013	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024	2025	2026	2027	2028	2029	2030	2031	2032	2033	2034
	Actual									Forecast												
Total	3.9%	5.6%	5.6%	5.6%	5.6%	5.6%	5.6%	5.6%	5.6%	5.6%	5.6%	5.6%	5.6%	5.6%	5.6%	5.6%	5.6%	5.6%	5.6%	5.6%	5.6%	5.6%
North America	5.1%	5.1%	5.1%	5.1%	5.1%	5.1%	5.1%	5.1%	5.1%	5.1%	5.1%	5.1%	5.1%	5.1%	5.1%	5.1%	5.1%	5.1%	5.1%	5.1%	5.1%	5.1%
Canada	5.3%	5.3%	5.3%	5.3%	5.3%	5.3%	5.3%	5.3%	5.3%	5.3%	5.3%	5.3%	5.3%	5.3%	5.3%	5.3%	5.3%	5.3%	5.3%	5.3%	5.3%	5.3%
United States	5.4%	5.4%	5.4%	5.4%	5.4%	5.4%	5.4%	5.4%	5.4%	5.4%	5.4%	5.4%	5.4%	5.4%	5.4%	5.4%	5.4%	5.4%	5.4%	5.4%	5.4%	5.4%
Europe	5.9%	5.9%	5.9%	5.9%	5.9%	5.9%	5.9%	5.9%	5.9%	5.9%	5.9%	5.9%	5.9%	5.9%	5.9%	5.9%	5.9%	5.9%	5.9%	5.9%	5.9%	5.9%
Germany	5.6%	5.6%	5.6%	5.6%	5.6%	5.6%	5.6%	5.6%	5.6%	5.6%	5.6%	5.6%	5.6%	5.6%	5.6%	5.6%	5.6%	5.6%	5.6%	5.6%	5.6%	5.6%
France	5.1%	5.1%	5.1%	5.1%	5.1%	5.1%	5.1%	5.1%	5.1%	5.1%	5.1%	5.1%	5.1%	5.1%	5.1%	5.1%	5.1%	5.1%	5.1%	5.1%	5.1%	5.1%
Italy	5.1%	5.1%	5.1%	5.1%	5.1%	5.1%	5.1%	5.1%	5.1%	5.1%	5.1%	5.1%	5.1%	5.1%	5.1%	5.1%	5.1%	5.1%	5.1%	5.1%	5.1%	5.1%
UK	5.6%	5.6%	5.6%	5.6%	5.6%	5.6%	5.6%	5.6%	5.6%	5.6%	5.6%	5.6%	5.6%	5.6%	5.6%	5.6%	5.6%	5.6%	5.6%	5.6%	5.6%	5.6%
Russia	5.2%	5.2%	5.2%	5.2%	5.2%	5.2%	5.2%	5.2%	5.2%	5.2%	5.2%	5.2%	5.2%	5.2%	5.2%	5.2%	5.2%	5.2%	5.2%	5.2%	5.2%	5.2%
Asia	5.9%	5.9%	5.9%	5.9%	5.9%	5.9%	5.9%	5.9%	5.9%	5.9%	5.9%	5.9%	5.9%	5.9%	5.9%	5.9%	5.9%	5.9%	5.9%	5.9%	5.9%	5.9%
Japan	5.8%	5.8%	5.8%	5.8%	5.8%	5.8%	5.8%	5.8%	5.8%	5.8%	5.8%	5.8%	5.8%	5.8%	5.8%	5.8%	5.8%	5.8%	5.8%	5.8%	5.8%	5.8%
China	5.5%	5.5%	5.5%	5.5%	5.5%	5.5%	5.5%	5.5%	5.5%	5.5%	5.5%	5.5%	5.5%	5.5%	5.5%	5.5%	5.5%	5.5%	5.5%	5.5%	5.5%	5.5%
India	5.5%	5.5%	5.5%	5.5%	5.5%	5.5%	5.5%	5.5%	5.5%	5.5%	5.5%	5.5%	5.5%	5.5%	5.5%	5.5%	5.5%	5.5%	5.5%	5.5%	5.5%	5.5%
Indonesia	5.6%	5.6%	5.6%	5.6%	5.6%	5.6%	5.6%	5.6%	5.6%	5.6%	5.6%	5.6%	5.6%	5.6%	5.6%	5.6%	5.6%	5.6%	5.6%	5.6%	5.6%	5.6%
Latin America	5.7%	5.7%	5.7%	5.7%	5.7%	5.7%	5.7%	5.7%	5.7%	5.7%	5.7%	5.7%	5.7%	5.7%	5.7%	5.7%	5.7%	5.7%	5.7%	5.7%	5.7%	5.7%
Brazil	5.5%	5.5%	5.5%	5.5%	5.5%	5.5%	5.5%	5.5%	5.5%	5.5%	5.5%	5.5%	5.5%	5.5%	5.5%	5.5%	5.5%	5.5%	5.5%	5.5%	5.5%	5.5%
Mexico	5.8%	5.8%	5.8%	5.8%	5.8%	5.8%	5.8%	5.8%	5.8%	5.8%	5.8%	5.8%	5.8%	5.8%	5.8%	5.8%	5.8%	5.8%	5.8%	5.8%	5.8%	5.8%
Middle East	5.2%	5.2%	5.2%	5.2%	5.2%	5.2%	5.2%	5.2%	5.2%	5.2%	5.2%	5.2%	5.2%	5.2%	5.2%	5.2%	5.2%	5.2%	5.2%	5.2%	5.2%	5.2%
Saudi Arabia	5.7%	5.7%	5.7%	5.7%	5.7%	5.7%	5.7%	5.7%	5.7%	5.7%	5.7%	5.7%	5.7%	5.7%	5.7%	5.7%	5.7%	5.7%	5.7%	5.7%	5.7%	5.7%
UAE	5.9%	5.9%	5.9%	5.9%	5.9%	5.9%	5.9%	5.9%	5.9%	5.9%	5.9%	5.9%	5.9%	5.9%	5.9%	5.9%	5.9%	5.9%	5.9%	5.9%	5.9%	5.9%
Africa	5.8%	5.8%	5.8%	5.8%	5.8%	5.8%	5.8%	5.8%	5.8%	5.8%	5.8%	5.8%	5.8%	5.8%	5.8%	5.8%	5.8%	5.8%	5.8%	5.8%	5.8%	5.8%
Nigeria	6.0%	6.0%	6.0%	6.0%	6.0%	6.0%	6.0%	6.0%	6.0%	6.0%	6.0%	6.0%	6.0%	6.0%	6.0%	6.0%	6.0%	6.0%	6.0%	6.0%	6.0%	6.0%
South Africa	5.6%	5.6%	5.6%	5.6%	5.6%	5.6%	5.6%	5.6%	5.6%	5.6%	5.6%	5.6%	5.6%	5.6%	5.6%	5.6%	5.6%	5.6%	5.6%	5.6%	5.6%	5.6%

Global - Annual Scenario 1 Outlook (Passenger numbers)

A Relaxing of Regulations; The fractious political landscapes in the developed world slowly begin to improve paving the way for faster adoption of required structural reforms while the brighter economic backdrop spreads to the emerging markets bringing the issue of air market liberalisation higher up the domestic agendas.

To/from the World

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Passenger numbers ('000s)	2013	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024	2025	2026	2027	2028	2029	2030	2031	2032	2033	2034
	Actual							Forecast														
Total	12,252	12,727	13,221	13,733	14,266	14,819	15,393	15,990	16,610	17,254	17,923	18,617	19,339	20,089	20,868	21,677	22,517	23,390	24,297	25,239	26,217	27,233
North America	2,039	2,142	2,251	2,365	2,485	2,611	2,743	2,882	3,028	3,182	3,343	3,512	3,690	3,877	4,074	4,280	4,497	4,725	4,964	5,216	5,480	5,758
Canada	159	167	176	186	195	206	217	228	240	253	266	281	296	311	328	345	363	383	403	424	447	471
United States	252	266	280	296	312	329	347	365	385	406	428	452	476	502	529	558	589	621	655	690	728	767
Europe	2,118	2,244	2,376	2,517	2,665	2,823	2,990	3,167	3,354	3,552	3,762	3,984	4,220	4,469	4,733	5,013	5,310	5,623	5,956	6,308	6,681	7,076
Germany	272	287	303	320	338	356	376	397	420	443	468	494	521	550	581	614	648	684	722	762	805	850
France	629	661	695	731	769	808	850	893	939	988	1,038	1,092	1,148	1,207	1,269	1,334	1,403	1,475	1,551	1,631	1,715	1,803
Italy	444	466	490	515	542	569	598	629	661	695	730	768	807	848	891	937	984	1,035	1,088	1,143	1,201	1,263
UK	446	472	498	526	556	587	620	655	692	731	772	816	862	910	961	1,016	1,073	1,133	1,197	1,264	1,336	1,411
Russia	573	603	634	668	702	739	778	819	861	906	954	1,004	1,056	1,111	1,169	1,231	1,295	1,363	1,434	1,509	1,588	1,671
Asia	1,761	1,865	1,975	2,092	2,216	2,347	2,487	2,634	2,790	2,955	3,130	3,315	3,512	3,720	3,940	4,174	4,421	4,683	4,960	5,254	5,565	5,895
Japan	754	798	844	893	945	1,000	1,058	1,120	1,185	1,253	1,326	1,403	1,485	1,571	1,662	1,759	1,861	1,969	2,083	2,204	2,332	2,468
China	590	623	657	694	732	773	816	861	909	959	1,012	1,068	1,128	1,190	1,256	1,326	1,400	1,477	1,559	1,646	1,737	1,833
India	569	600	633	668	704	743	783	826	871	919	969	1,022	1,078	1,137	1,199	1,264	1,333	1,406	1,483	1,564	1,649	1,739
Indonesia	207	219	231	244	258	273	288	304	321	339	358	378	399	422	446	471	497	525	554	585	618	653
Latin America	2,085	2,204	2,328	2,460	2,600	2,747	2,902	3,067	3,241	3,424	3,618	3,823	4,040	4,268	4,510	4,766	5,036	5,321	5,622	5,941	6,277	6,633
Brazil	303	320	338	357	377	398	420	443	467	493	521	550	580	612	646	682	720	760	802	847	894	943
Mexico	232	245	259	274	290	307	325	343	363	384	406	430	455	481	509	538	569	602	637	673	712	753
Middle East	1,879	1,977	2,079	2,187	2,301	2,420	2,546	2,678	2,817	2,964	3,118	3,280	3,450	3,629	3,818	4,016	4,225	4,444	4,675	4,918	5,174	5,442
Saudi Arabia	372	393	416	439	464	491	519	548	579	612	647	684	723	764	808	854	902	953	1,008	1,065	1,126	1,190
UAE	681	721	763	807	855	905	958	1,014	1,073	1,136	1,202	1,272	1,347	1,426	1,509	1,597	1,691	1,790	1,895	2,005	2,123	2,247
Africa	1,857	1,965	2,080	2,200	2,328	2,464	2,607	2,758	2,919	3,088	3,268	3,458	3,659	3,871	4,096	4,334	4,586	4,853	5,135	5,433	5,749	6,083
Nigeria	134	142	150	159	169	179	190	201	213	226	240	254	269	286	303	321	340	360	382	405	429	455
South Africa	37	39	42	44	46	49	52	55	58	61	65	68	72	76	80	85	90	95	100	106	112	118

Global - Annual Scenario 2 Outlook (%)

A Pick-Up in Protectionism; Political landscapes become even more fractious than at present, corresponding with an increase in financial market tensions, and even more sluggish economic recoveries. Protectionist economic policies gather momentum, while the appetite for further air market liberalisation is diminished.

To/from the World

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Annual % change	2013	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024	2025	2026	2027	2028	2029	2030	2031	2032	2033	2034
	Actual								Forecast													
Total	3.9%	1.0%	1.0%	1.0%	1.0%	1.0%	1.0%	1.0%	1.0%	1.0%	1.0%	1.0%	1.0%	1.0%	1.0%	1.0%	1.0%	1.0%	1.0%	1.0%	1.0%	1.0%
North America	1.4%	1.4%	1.4%	1.4%	1.4%	1.4%	1.4%	1.4%	1.4%	1.4%	1.4%	1.4%	1.4%	1.4%	1.4%	1.4%	1.4%	1.4%	1.4%	1.4%	1.4%	1.4%
Canada	1.3%	1.3%	1.3%	1.3%	1.3%	1.3%	1.3%	1.3%	1.3%	1.3%	1.3%	1.3%	1.3%	1.3%	1.3%	1.3%	1.3%	1.3%	1.3%	1.3%	1.3%	1.3%
United States	1.6%	1.6%	1.6%	1.6%	1.6%	1.6%	1.6%	1.6%	1.6%	1.6%	1.6%	1.6%	1.6%	1.6%	1.6%	1.6%	1.6%	1.6%	1.6%	1.6%	1.6%	1.6%
Europe	1.4%	1.4%	1.4%	1.4%	1.4%	1.4%	1.4%	1.4%	1.4%	1.4%	1.4%	1.4%	1.4%	1.4%	1.4%	1.4%	1.4%	1.4%	1.4%	1.4%	1.4%	1.4%
Germany	1.5%	1.5%	1.5%	1.5%	1.5%	1.5%	1.5%	1.5%	1.5%	1.5%	1.5%	1.5%	1.5%	1.5%	1.5%	1.5%	1.5%	1.5%	1.5%	1.5%	1.5%	1.5%
France	1.1%	1.1%	1.1%	1.1%	1.1%	1.1%	1.1%	1.1%	1.1%	1.1%	1.1%	1.1%	1.1%	1.1%	1.1%	1.1%	1.1%	1.1%	1.1%	1.1%	1.1%	1.1%
Italy	1.9%	1.9%	1.9%	1.9%	1.9%	1.9%	1.9%	1.9%	1.9%	1.9%	1.9%	1.9%	1.9%	1.9%	1.9%	1.9%	1.9%	1.9%	1.9%	1.9%	1.9%	1.9%
UK	1.9%	1.9%	1.9%	1.9%	1.9%	1.9%	1.9%	1.9%	1.9%	1.9%	1.9%	1.9%	1.9%	1.9%	1.9%	1.9%	1.9%	1.9%	1.9%	1.9%	1.9%	1.9%
Russia	1.8%	1.8%	1.8%	1.8%	1.8%	1.8%	1.8%	1.8%	1.8%	1.8%	1.8%	1.8%	1.8%	1.8%	1.8%	1.8%	1.8%	1.8%	1.8%	1.8%	1.8%	1.8%
Asia	1.4%	1.4%	1.4%	1.4%	1.4%	1.4%	1.4%	1.4%	1.4%	1.4%	1.4%	1.4%	1.4%	1.4%	1.4%	1.4%	1.4%	1.4%	1.4%	1.4%	1.4%	1.4%
Japan	1.5%	1.5%	1.5%	1.5%	1.5%	1.5%	1.5%	1.5%	1.5%	1.5%	1.5%	1.5%	1.5%	1.5%	1.5%	1.5%	1.5%	1.5%	1.5%	1.5%	1.5%	1.5%
China	2.0%	2.0%	2.0%	2.0%	2.0%	2.0%	2.0%	2.0%	2.0%	2.0%	2.0%	2.0%	2.0%	2.0%	2.0%	2.0%	2.0%	2.0%	2.0%	2.0%	2.0%	2.0%
India	1.9%	1.9%	1.9%	1.9%	1.9%	1.9%	1.9%	1.9%	1.9%	1.9%	1.9%	1.9%	1.9%	1.9%	1.9%	1.9%	1.9%	1.9%	1.9%	1.9%	1.9%	1.9%
Indonesia	2.0%	2.0%	2.0%	2.0%	2.0%	2.0%	2.0%	2.0%	2.0%	2.0%	2.0%	2.0%	2.0%	2.0%	2.0%	2.0%	2.0%	2.0%	2.0%	2.0%	2.0%	2.0%
Latin America	1.3%	1.3%	1.3%	1.3%	1.3%	1.3%	1.3%	1.3%	1.3%	1.3%	1.3%	1.3%	1.3%	1.3%	1.3%	1.3%	1.3%	1.3%	1.3%	1.3%	1.3%	1.3%
Brazil	1.2%	1.2%	1.2%	1.2%	1.2%	1.2%	1.2%	1.2%	1.2%	1.2%	1.2%	1.2%	1.2%	1.2%	1.2%	1.2%	1.2%	1.2%	1.2%	1.2%	1.2%	1.2%
Mexico	1.6%	1.6%	1.6%	1.6%	1.6%	1.6%	1.6%	1.6%	1.6%	1.6%	1.6%	1.6%	1.6%	1.6%	1.6%	1.6%	1.6%	1.6%	1.6%	1.6%	1.6%	1.6%
Middle East	1.8%	1.8%	1.8%	1.8%	1.8%	1.8%	1.8%	1.8%	1.8%	1.8%	1.8%	1.8%	1.8%	1.8%	1.8%	1.8%	1.8%	1.8%	1.8%	1.8%	1.8%	1.8%
Saudi Arabia	1.5%	1.5%	1.5%	1.5%	1.5%	1.5%	1.5%	1.5%	1.5%	1.5%	1.5%	1.5%	1.5%	1.5%	1.5%	1.5%	1.5%	1.5%	1.5%	1.5%	1.5%	1.5%
UAE	1.7%	1.7%	1.7%	1.7%	1.7%	1.7%	1.7%	1.7%	1.7%	1.7%	1.7%	1.7%	1.7%	1.7%	1.7%	1.7%	1.7%	1.7%	1.7%	1.7%	1.7%	1.7%
Africa	1.6%	1.6%	1.6%	1.6%	1.6%	1.6%	1.6%	1.6%	1.6%	1.6%	1.6%	1.6%	1.6%	1.6%	1.6%	1.6%	1.6%	1.6%	1.6%	1.6%	1.6%	1.6%
Nigeria	1.8%	1.8%	1.8%	1.8%	1.8%	1.8%	1.8%	1.8%	1.8%	1.8%	1.8%	1.8%	1.8%	1.8%	1.8%	1.8%	1.8%	1.8%	1.8%	1.8%	1.8%	1.8%
South Africa	1.6%	1.6%	1.6%	1.6%	1.6%	1.6%	1.6%	1.6%	1.6%	1.6%	1.6%	1.6%	1.6%	1.6%	1.6%	1.6%	1.6%	1.6%	1.6%	1.6%	1.6%	1.6%



Global - Annual Scenario 2 Outlook (Passenger numbers)

A Pick-Up in Protectionism; Political landscapes become even more fractious than at present, corresponding with an increase in financial market tensions, and even more sluggish economic recoveries. Protectionist economic policies gather momentum, while the appetite for further air market liberalisation is diminished.

To/from the World

Note: full access to our forecast database is available through our online webtool. Please contact us for more details (contact details can be found on the Glossary tab).

Passenger numbers ('000s)	2013	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024	2025	2026	2027	2028	2029	2030	2031	2032	2033	2034
	Actual										Forecast											
Total	12,252	12,375	12,499	12,624	12,750	12,877	13,006	13,136	13,268	13,400	13,534	13,670	13,806	13,944	14,084	14,225	14,367	14,510	14,656	14,802	14,950	15,100
North America	1,384	1,404	1,424	1,444	1,464	1,485	1,506	1,527	1,548	1,570	1,592	1,615	1,637	1,660	1,684	1,707	1,731	1,756	1,781	1,806	1,831	1,857
Canada	116	118	119	121	123	124	126	127	129	131	132	134	136	138	139	141	143	145	147	149	151	153
United States	187	190	193	196	199	202	206	209	212	216	219	223	226	230	233	237	241	245	248	252	256	260
Europe	1,231	1,248	1,266	1,284	1,302	1,321	1,339	1,358	1,378	1,397	1,417	1,437	1,457	1,478	1,499	1,520	1,542	1,563	1,586	1,608	1,631	1,654
Germany	198	201	203	206	209	212	216	219	222	225	228	232	235	239	242	246	249	253	257	260	264	268
France	460	466	471	476	481	487	492	498	503	509	515	521	526	532	538	544	550	557	563	569	576	582
Italy	347	354	361	368	375	382	389	397	404	412	420	428	436	445	453	462	471	480	489	499	508	518
UK	334	340	347	353	360	366	373	380	387	395	402	410	417	425	433	441	449	458	466	475	484	493
Russia	441	449	457	466	474	483	492	501	510	520	529	539	549	559	570	580	591	602	613	624	636	647
Asia	1,491	1,513	1,534	1,556	1,578	1,600	1,623	1,646	1,670	1,693	1,718	1,742	1,767	1,792	1,817	1,843	1,869	1,896	1,923	1,950	1,978	2,006
Japan	539	547	555	564	572	580	589	597	606	615	624	633	643	652	662	671	681	691	701	712	722	733
China	447	456	465	474	484	493	503	513	523	533	543	554	565	576	587	599	611	622	635	647	660	673
India	433	441	450	458	467	476	485	494	504	513	523	533	543	554	564	575	586	597	609	620	632	644
Indonesia	156	160	163	166	169	172	176	179	183	186	190	194	197	201	205	209	213	217	222	226	230	235
Latin America	1,647	1,669	1,691	1,713	1,736	1,759	1,782	1,806	1,830	1,854	1,879	1,904	1,929	1,955	1,981	2,007	2,034	2,061	2,088	2,116	2,144	2,172
Brazil	217	220	222	225	228	230	233	236	239	242	245	248	251	254	257	260	263	266	269	273	276	279
Mexico	168	171	173	176	179	182	185	188	191	194	197	200	203	207	210	213	217	220	224	227	231	234
Middle East	1,255	1,277	1,300	1,323	1,347	1,371	1,396	1,421	1,447	1,473	1,499	1,526	1,553	1,581	1,610	1,639	1,668	1,698	1,729	1,760	1,791	1,823
Saudi Arabia	270	274	278	282	287	291	295	300	304	309	314	319	323	328	333	339	344	349	354	360	365	371
UAE	492	501	509	517	526	534	543	552	561	571	580	590	599	609	619	630	640	651	661	672	683	695
Africa	1,351	1,373	1,395	1,418	1,441	1,464	1,488	1,512	1,537	1,562	1,587	1,613	1,639	1,666	1,693	1,721	1,749	1,777	1,806	1,835	1,865	1,896
Nigeria	97	98	100	102	104	105	107	109	111	113	115	117	119	121	123	126	128	130	132	135	137	139
South Africa	27	28	28	29	29	29	30	30	31	31	32	32	33	33	34	34	35	36	36	37	37	38

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About Us

IATA

The International Air Transport Association (IATA) represents some 240 airlines comprising 84% of global air traffic. IATA's Economics team enjoys a strong reputation for delivering insightful analysis into aviation market and industry developments. IATA's comprehensive suite of statistical services also offers timely access to high-quality intelligence into global air markets.

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Tourism Economics

Tourism Economics is an Oxford Economics company with a singular focus on quantitative analysis of the travel industry. By combining rigorous modeling with industry knowledge, Tourism Economics develops custom market strategies, industry forecasts, policy analysis and economic impact studies. Our parent company, Oxford Economics, is one of the world's leading providers of economic analysis, forecasts and consulting advice. Founded in 1981 as a joint venture with Oxford University's business college, Oxford Economics enjoys a reputation for high quality, quantitative analysis and evidence-based advice.

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Glossary

Country pair

Annual flow of air passengers between two countries on a bi-directional basis (eg, the country pair 'United States - United Kingdom' includes passenger flows from the US to the UK as well as from the UK to the US). The country pairs are reported on an origin-destination basis. For example, if a passenger flies from an origin in the UK to a destination in the US via a connection in another country, the trip will be recorded as a passenger traveling from the UK to the US.

Annual percentage change

Amount of growth or decline from the same period last year. Calculated as $((\text{This year} - \text{Last year}) / \text{Last Year}) * 100$.

Passenger market

The annual flow of air passengers to, from and within the market in question. Equals the sum of the country-pair flows for that country.

Scenario 1

The fractious political landscapes in the developed world slowly begin to improve paving the way for faster adoption of required structural reforms while the brighter economic backdrop spreads to the emerging markets bringing the issue of air market liberalisation higher up the domestic agendas.

Scenario 2

Political landscapes become even more fractious than at present, corresponding with an increase in financial market tensions, and even more sluggish economic recoveries. Protectionist economic policies gather momentum, while the appetite for further air market liberalisation is diminished.

Market

Market totals measure the annual flow of passenger to, from and within the country or region in question.

Compound Annual Growth Rate (CAGR)

The smoothed annualized growth rate over a given time period. Calculated as $(\text{Ending Value} / \text{Beginning Value})^{(1 / \text{Number of Years})} - 1$.

Definition of passengers

The passenger numbers in our service are taken from IATA's Passenger Intelligence Service (better known as PaxIS: www.pax-is.com) and are derived from ticket sales settled through IATA's Billing and Settlement Plan offices around the world. The PaxIS data directly cover 80% of the world ticket sales, but include accurate estimates of other sales channels such as direct sales by airlines and by low cost carriers, to capture 100% of traffic. The data cover scheduled flights only and measure the annual flow of air passengers between two countries on a bi-directional basis (eg, the country pair 'United States - United Kingdom' includes passenger flows from the US to the UK as well as from the UK to the US). The country pairs are also reported on an origin-destination basis. For example, if a passenger flies from an origin in the UK to a destination in the US via a connection in another country, the trip will be recorded as a passenger traveling from the UK to the US.

Market and regional definitions

Note that the market totals are calculated from our underlying bi-directional country-pair forecasts. The individual markets therefore represent the total number of passenger journeys to, from and within a given market. As with the individual market totals, the regional numbers represent the total number of passenger journeys to, from and within a given region. Note that for conceptual reasons, and to avoid double counting, regional totals do not equal the sum of their respective individual markets.