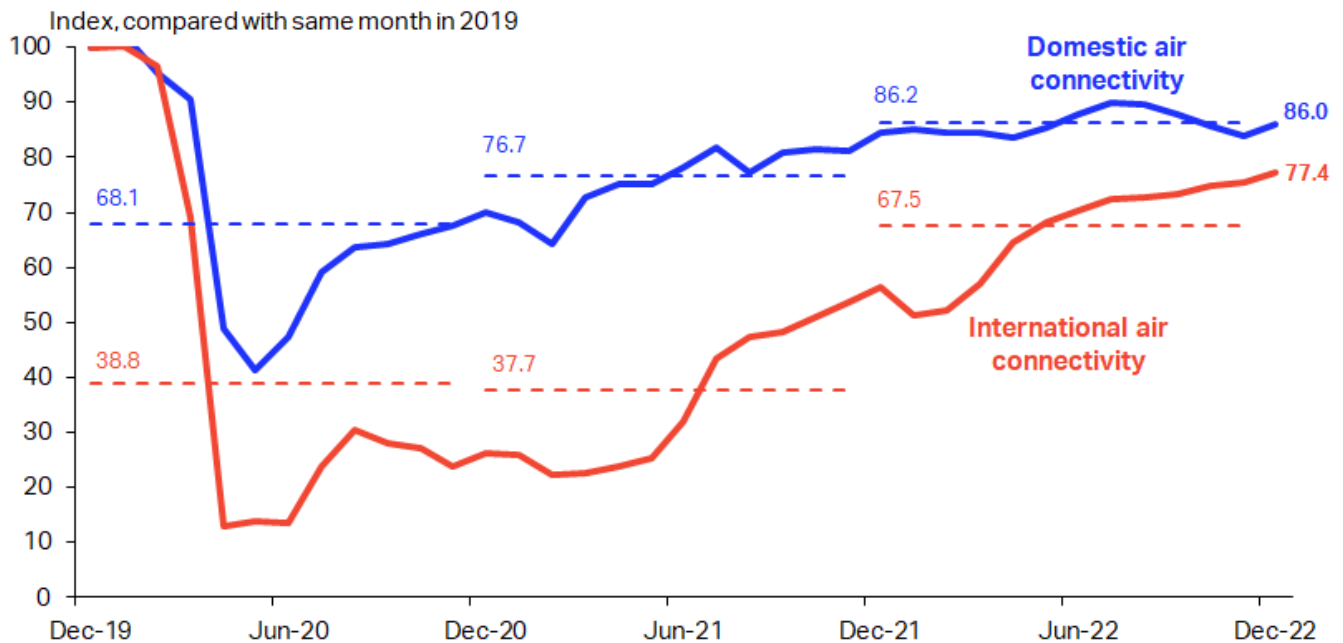




IATA Economics' Chart of the Week

03 February 2023

Air connectivity recovers further but still below pre-COVID



Source: IATA Economics using OAG data. Dotted lines depict annual average levels.

- IATA's measure of air connectivity – which takes into account not only the number of unique city pair connections, but also the economic importance of those routings – continued to recover over the course of 2022. Air connectivity matters because it represents the virtual bridges which support the flows of key economic activities between markets – enabling world trade, investment, tourism and travel. In turn, air connectivity makes an important contribution to a country's economic growth, employment and improvements in living standards for its citizens.
- Air connectivity fell by more than 70% following the onset of the COVID-19 pandemic, but has been steadily recovering since around mid-2020. At the global level, air connectivity is currently still around 17% below its pre-COVID (2019) level. Even so, over the course of 2022 as a whole, this represents a solid 16 percentage point increase compared to 2021.
- The performance of Domestic and International air connectivity has varied considerably over the past three years, with the former proving to be relatively the more resilient. Domestic market air connectivity has risen to 86% of its 2019 level currently, up 9.5 percentage points in 2022 compared with 2021. International air connectivity continues to lag its domestic counterpart, by a sizeable margin, at 77.4% of its pre-COVID performance. Having said that, over the year as a whole, the improvement in international connectivity outpaced that of domestic by a factor of three, with a near 30 percentage point gain. In large part, this surge reflects the removal of travel restrictions and the re-opening of international travel markets which gathered momentum over 2022.
- The improvement in air connectivity is consistent with the ongoing recovery seen in air passenger and cargo markets over the course of the year. While there is still some way to go to return to the pre-COVID level of connectivity, the re-integration of the significant China aviation market will be an important part of the continued recovery in 2023.

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