

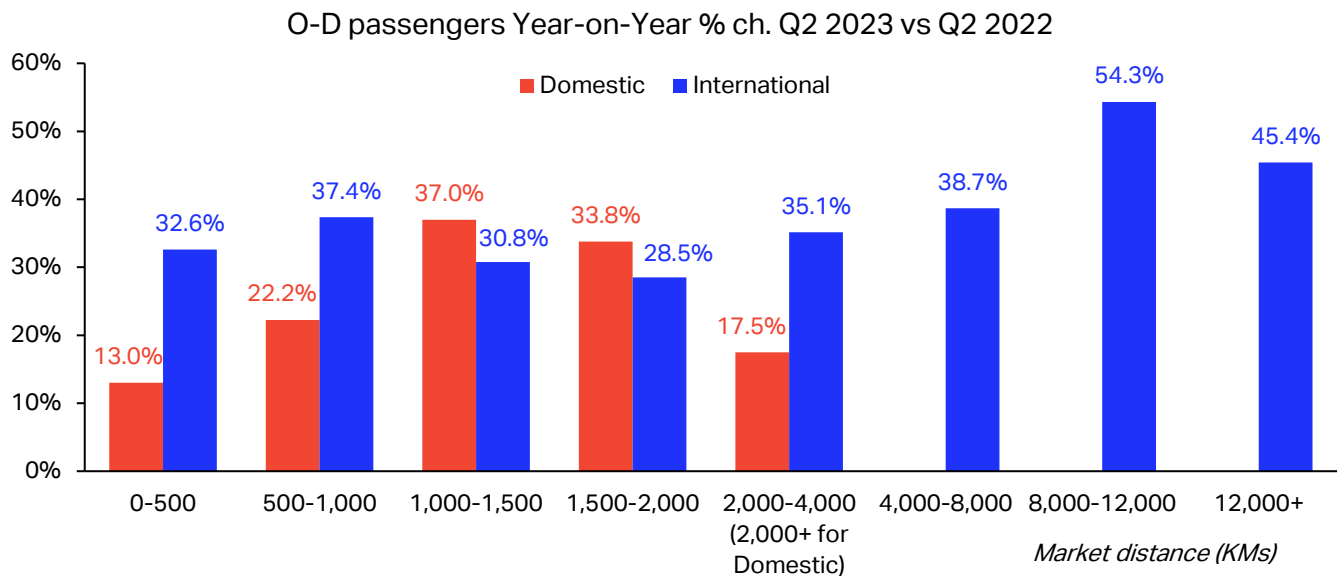


Chart of the Week

29 September 2023

Broad passenger growth across markets in Q2 2023

Change in the number of Origin-Destination (O-D) Passengers by market distance



Source: IATA Sustainability and Economics, based on data from DDS.

- In Q2 2023, global origin-destination (O-D) passenger traffic grew 28.9% compared to Q2 2022 levels, totaling 954 million passengers. This brought global passenger traffic close to pre-pandemic levels, just 3.5% below Q2 2019. The growth primarily stemmed from domestic markets, surpassing their Q2 2019 figures by around 2.5% (14 million passengers). International passengers also rebounded to 88.8% of 2019 levels with a 35.6% year-on-year growth in Q2 2023, owing to the strong performance of Asia-Pacific markets. This progress indicates a substantial recovery from Q2 2022 when domestic and international passengers were 17.8% and 34.5% below pre-pandemic levels, respectively.
- The recovery of passengers, however, has varied across market distances (see chart). Domestic markets beyond 500 km surpassed their 2019 traffic levels in Q2 2023, with medium-haul markets (1,000–2,000 km) leading in performance. Shorter-distance domestic traffic (less than 500 km) exhibited slower annual growth than other domestic markets (13.0%) and remained 7.8% below 2019 levels. In Q2 2023, 85 countries still had domestic passenger numbers below Q2 2019 levels for markets shorter than 500 km, while 71 countries exceeded their 2019 domestic passenger numbers.
- Despite the strong annual growth in international passengers in Q2 2023, they were still 11.2% below Q2 2019 levels, with around 48.7 million fewer passengers. This deficit was spread across various market distance groups, with the largest gap in passenger numbers for markets between 2,000 and 4,000 km. The long-haul markets (8,000 to 12,000 km) had the largest percentage difference from 2019 levels, despite experiencing the fastest annual growth in Q2 2023, driven by the restoration of long-haul international service in the Asia Pacific region. Steady trends in ticket sales for future travel indicate continued passenger number growth in the coming months. However, uncertainties surrounding China's economy raise questions about the sustainability of recovery trends in domestic and international markets across the Asia-Pacific region.

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