

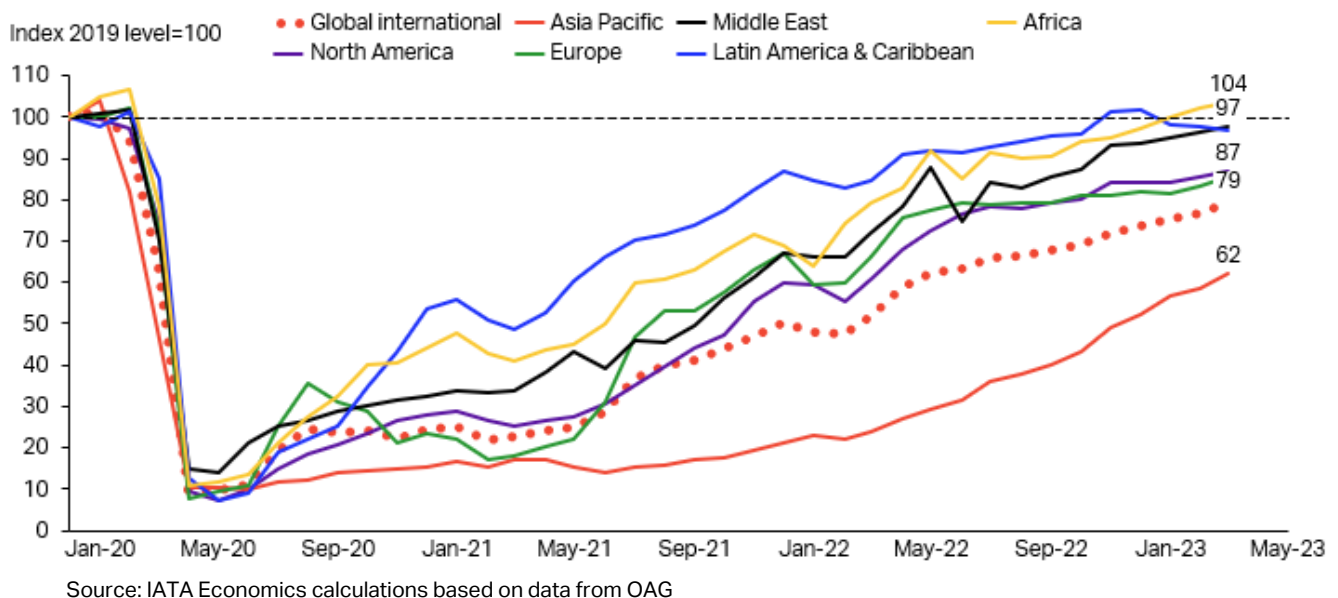


Chart of the Week

28 April 2023

International air connectivity closing in on pre-COVID levels

IATA International Air Connectivity Index by region for all international routes, monthly Jan 2020-Mar 2023



- Global international air connectivity (measured by IATA's Air Connectivity Index) continued to recover in the first quarter of 2023. As of March 2023, overall (global) international air connectivity stood at 79% of its pre-pandemic (2019) level, demonstrating a steady monthly improvement despite the slowdown in economic activity through 2022 and into the start of this year.
- The recovery is broad-based across regions, with Africa the strongest performer currently; international air connectivity in Africa has exceeded its 2019 level and was at 104% in March 2023. Latin America & the Caribbean and the Middle East regions are approaching pre-COVID levels at 97% and 98%, respectively while for both Europe and North America, international connectivity is currently at 87% of the 2019 level.
- Asia-Pacific continues to lag the recovery in the other regions, at a more modest 62% of its 2019 level in March. Having said that, there has been a strong increase – of 40 percentage points (pp) – in Asia Pacific international air connectivity over the past year. With China and other important regional markets only relatively recently reopening borders and lifting travel restrictions, we anticipate a sizeable improvement again this year which will further close the gap to the performance of other regions.
- Overall, international air connectivity has recovered more rapidly than domestic over the past year, growing by 27pp compared with 10pp for the latter. This increase primarily reflects the relatively low level of international connectivity in early 2022 and the surge of international travel demand driven by the reopening of international travel markets, which gained momentum through the year.
- Air connectivity is crucial as it serves as a virtual bridge that facilitates the movement of essential economic activities between markets, enhancing world trade, investment, tourism, and travel. Air connectivity plays an important role in increasing economic growth, generating employment opportunities, and improving living standards.

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