

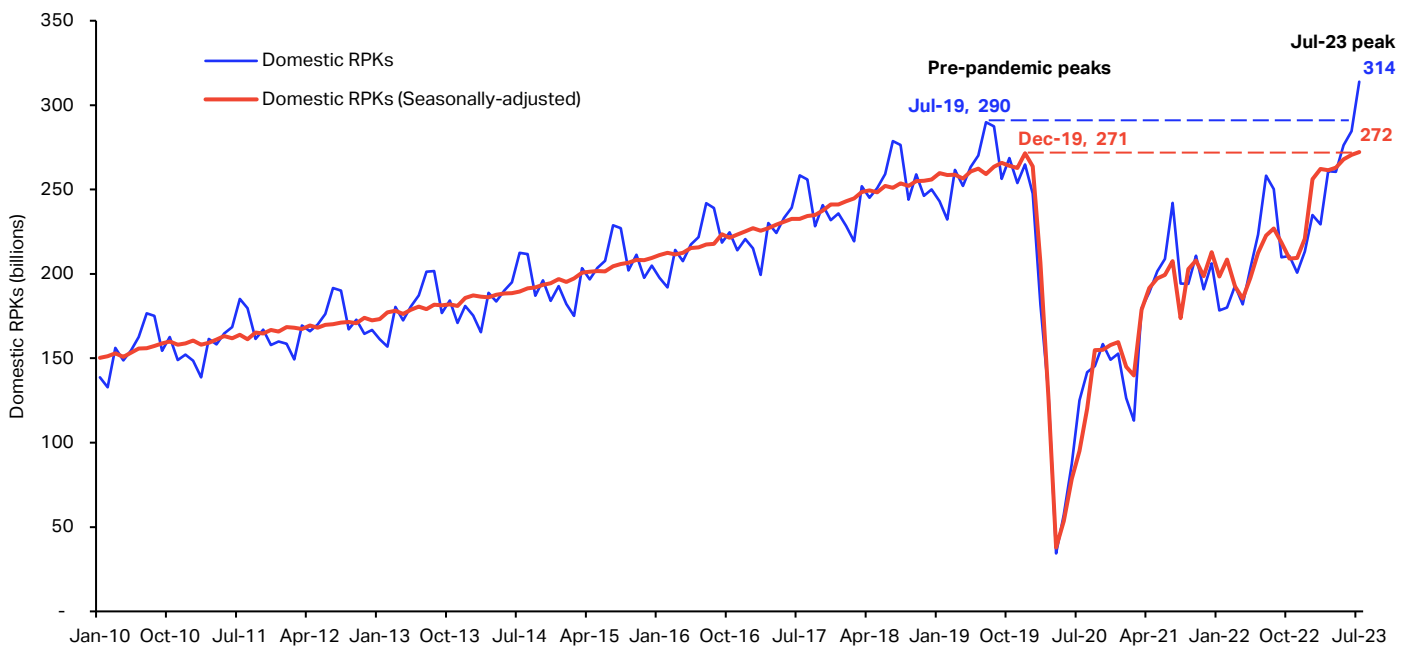


Chart of the Week

15 September 2023

July sets all-time high for domestic passenger traffic

Global domestic revenue passenger-kilometers (RPKs, in billions), January 2010 – July 2023



Source: IATA Sustainability and Economics, IATA Monthly Statistics

- Domestic air travel has been a driving force in the recovery of global passenger demand since the onset of the pandemic, mainly due to the early reopening of domestic markets. We have seen many firsts in 2023 as air passenger demand made a strong recovery across regions. Domestic traffic surpassed 2019 levels for the first time in April, exceeding April 2019 revenue passenger-kilometers (RPKs) by 2.9%. In May, domestic RPKs increased above their 2019 numbers by 5.3%, also restoring the global passenger load factor to pre-pandemic levels for the first time. These developments helped industry-wide RPKs surge by almost 60% year-on-year (YoY) in the first quarter of 2023 and continue with a 40.5% growth in the second quarter.
- This week's chart highlights a new milestone achieved by domestic RPKs in July, which increased 8.3% YoY to surpass the previous all-time high of 290 billion RPKs, set in July 2019. As a peak month for air travel, July has generally been the record-setting month for domestic RPKs. However, July 2023 was exceptional as seasonally-adjusted domestic RPKs also outperformed their December 2019 record.
- China played a significant role in this July's performance, with a 22.5% growth in domestic traffic compared to July 2019 levels, driven by domestic tourism and the easing of China's zero-Covid policy. China's domestic market historically contributes nearly 10% of total industry RPKs, making its recovery crucial for global traffic trends. China fully restored its domestic traffic in April 2023, and maintained impressive annual growth rates in May and June of over 7% and 15%, respectively.
- India also witnessed steady growth, with domestic RPKs rising by 21.1% YoY in July, nearly matching 2019 levels. Japan's domestic RPKs remained above 2019 numbers for the third consecutive month in July, while the US domestic market remained strong, exceeding pre-pandemic levels by 3%. As the year progresses, we will gain further insights into the factors influencing domestic traffic, as domestic markets continue to adapt to the new normal and align with seasonal trends in passenger demand.

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