

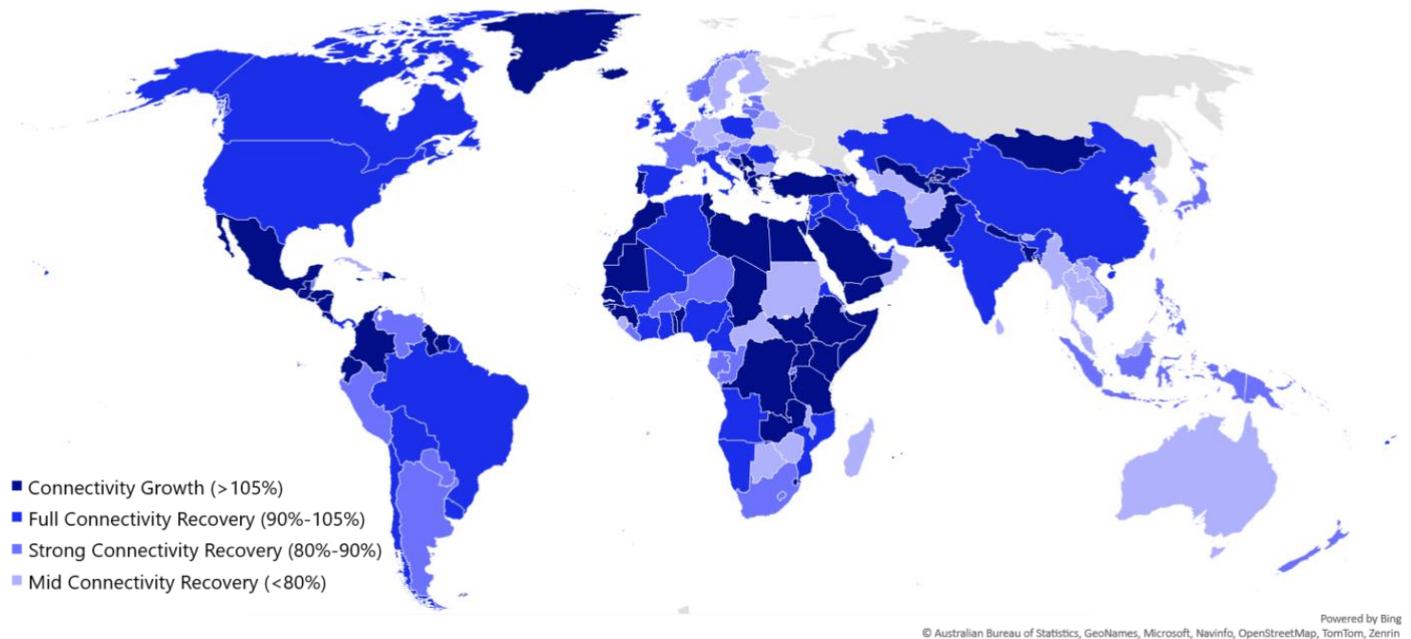


Chart of the Week

28 July 2023

Post pandemic connectivity recovery nearly complete

Comparison of air connectivity levels Q2 2023 vs Q2 2019



- The latest quarterly IATA air connectivity analysis shows that in Q2 of 2023 the majority of countries across the globe have reached or exceeded their pre-pandemic levels of connectivity. The assessment captures the number of available seats to each destination, which are then weighted by the size of the destination airport. The weighting for each destination gives an indication of the economic importance of the destination airport and the number of onward connections it can provide. The connectivity measure is hence a proxy for the ease with which a country can be reached, which in turn translates into the propensity of linking businesses, having access to education and providing a strong platform for tourism.
- A comparison of the connectivity levels observed in Q2 2019 and Q2 2023 shows how close to full recovery the global aviation industry has come. A number of countries in Central America, Asia and Africa have already reached the Q2 2019 connectivity levels. The recovery in Europe has been mixed, with countries such as Germany, Finland and Sweden staying below the 80% connectivity level. This can be linked to some shifts to short haul travel patterns, and also disruption related to the closure of Russian airspace to European airlines.
- A number of countries in South East Asia such as Indonesia and the Philippines are nearing the 90% connectivity recovery mark, a lag resulting from the relatively recent reopening of the sizeable China market in Q1 2023. Strong further improvement in connectivity to and within the region is expected in coming months.
- A particularly strong performance has been seen in Africa, where the connectivity of a number of countries now exceeds that of 2019. While the level of connectivity remains below that of many 'developed' economies, the strong and swift recovery in connectivity creates a positive message for the growing importance of the region and a favourable outlook for economic growth and development in the coming years.

Terms and Conditions for the use of this IATA Economics Report and its contents can be found [here](#). By using this IATA Economics Report and its contents in any manner, you agree that the IATA Economics Report Terms and Conditions apply to you and agree to abide by them. If you do not accept these Terms and Conditions, do not use this report.

IATA Sustainability & Economics
economics@iata.org