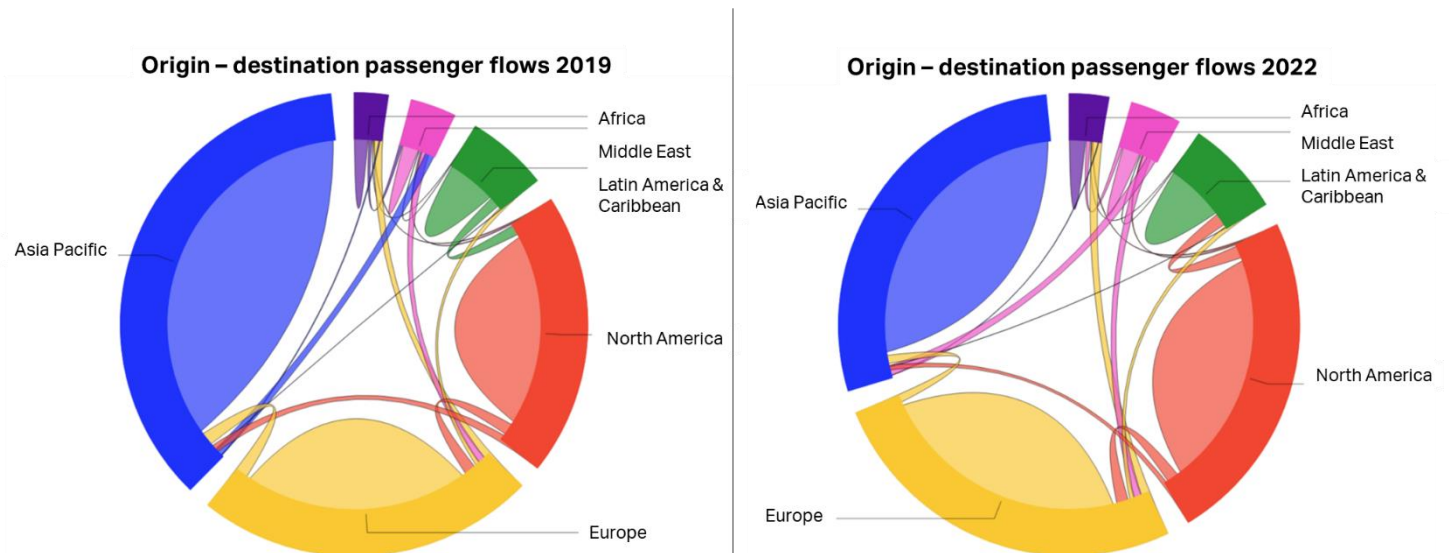


## Post-pandemic traffic shows only slight change in pax flows



- Notwithstanding the massive disruption that Covid-19 inflicted upon the air transport industry, the post-pandemic passenger traffic flows have since followed a broadly similar pattern to that seen prior to the pandemic. The two Chord charts above show the origin and destination regions of passengers flying in 2019 and 2022 (left and right chart respectively). The thickness of the lines depicts the relative volume of passengers travelling between the regions. The color of the lines represents the dominant direction of travel (e.g., in both years more passengers flew from North America to Asia Pacific, so the connecting line is red rather than blue).
- A comparison of the charts indicates that some changes to the traffic flows have occurred, but no structural shifts have taken place. Firstly, the majority of traffic is contained within geographical regions. In fact, the underlying data confirms that both in 2019 and 2022 approximately 85% of all passenger journeys commenced and finished within the same region. The proportion varied across regions, with approx. 96% of journeys having been completed within region in Asia Pacific in 2019, but only 45% in the Middle East and 52% in Africa.
- In both years, Asia Pacific was the dominant origin market and in 2019 approximately 40% of all passengers began their journey in this region. Given the prolonged travel restrictions, the recovery in that region has been delayed, with 921 million journeys having been commenced in the region in 2022 compared to 1,563 million in 2019. As such, in 2022 Asia Pacific accounted for 31% of originating journeys.
- Interestingly, despite North America dominating the traffic recovery in terms of revenue passenger kilometers (as reported [here](#)), more passenger journeys were commenced in Europe than in North America both in 2019 and 2022. In 2019, 26% of journeys commenced in Europe, compared to 22% journeys in North America. Given the slower recovery of Asia Pacific traffic, these shares increased to 29% and 26% in 2022 respectively.
- With regards to cross-region traffic, the flows between Asia Pacific and Europe have historically held the largest inter-regional share, albeit accounting only for 3% of total passenger journeys. This is followed by flows between Europe and North America, accounting for around 2% of passenger journeys.
- Going forward, the expected continued recovery in traffic in the Asia Pacific region will likely shift the traffic flows closer to the patterns which were observed in 2019.