

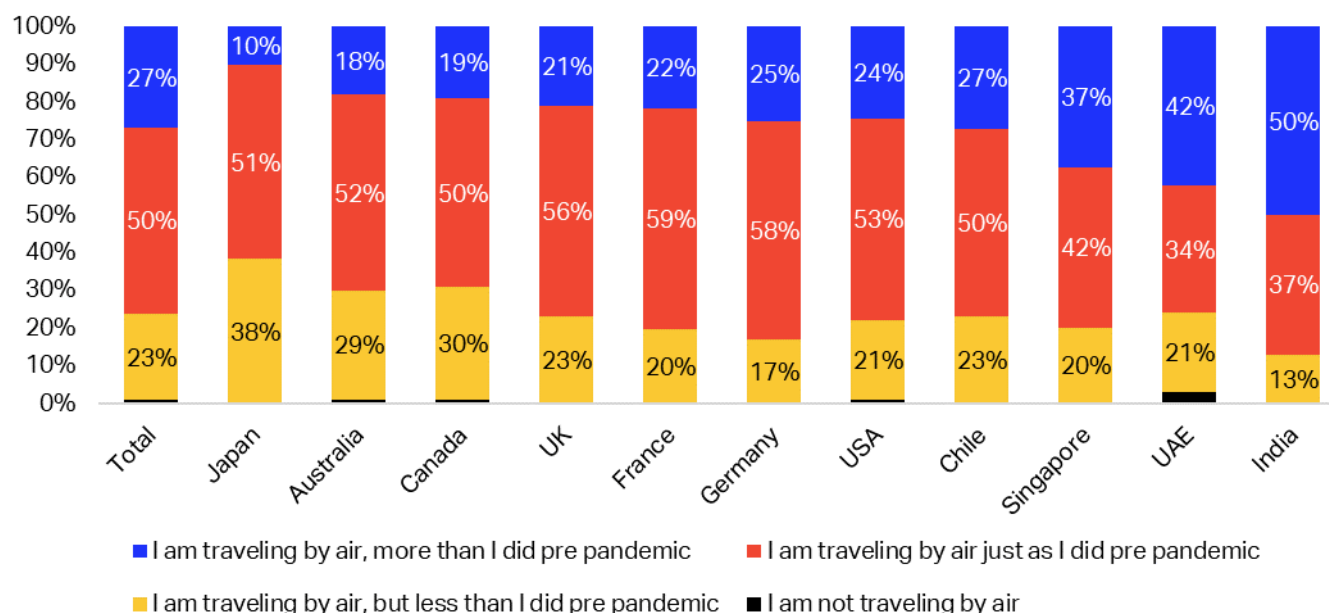


## Chart of the Week

14 July 2023

### Survey further reveals post-pandemic air traveler trends

% of responses



Source: IATA Passenger Trends and Insights Survey

- IATA has recently completed the 10<sup>th</sup> edition of its *Passenger Trends and Insights Survey* undertaken in late April 2023, which asks more than 4,500 air travelers across 11 countries about their traveling habits and views towards the aviation industry<sup>1</sup>.
- The post pandemic traffic recovery continues, with RPKs having reached 96% of the 2019 level in May 2023 and in some domestic markets exceeding the pre-Covid level. Against this backdrop, half of all passengers surveyed responded that they are travelling to a similar extent as they did prior to Covid, up 10 percentage points from a year ago. Around 25% are travelling more than pre-Covid and a similar proportion are traveling less. There is considerable variation across those countries surveyed which is driven by a variety of factors including how recently travel restrictions were lifted and the size of the domestic market.
- The proportion of air travelers who say that they are currently taking fewer trips than before 2020 ranges between 13% in India and 38% in Japan. For most countries, the share lies between 20% and 30% and despite falling from an average 37% a year ago, remains significant. In addition to Japan, a relatively high share of passengers from Canada and Australia reported travelling less by air than they did before.
- The results of the survey raise the question of whether the reported outcomes reflect a permanent change in behavior or simply the gradual return to pre-pandemic trends. Although the survey is not definitive, the detailed responses provide some insights. Concerns related to economic uncertainty, the cost-of-living crisis and the price of air travel were raised frequently by this group of respondents as well as shifts in corporate travel policy and attitudes towards sustainability.
- Understanding changes in passenger preferences and behavior is something that we will continue to monitor as the industry moves beyond the recovery phase. Nonetheless, our current long-term forecasts present a positive outlook with global passenger demand expected to double over the next 20 years.

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<sup>1</sup> The sample size was 500 for Australia, Canada, France, Germany, India, UK, and the US, and 300 for Chile, Japan, Singapore, and the UAE. This Is Motif Ltd prepared the questionnaire and analysis based on data collection and tabulation by Dynata. [www.thisismotif.com](http://www.thisismotif.com)