

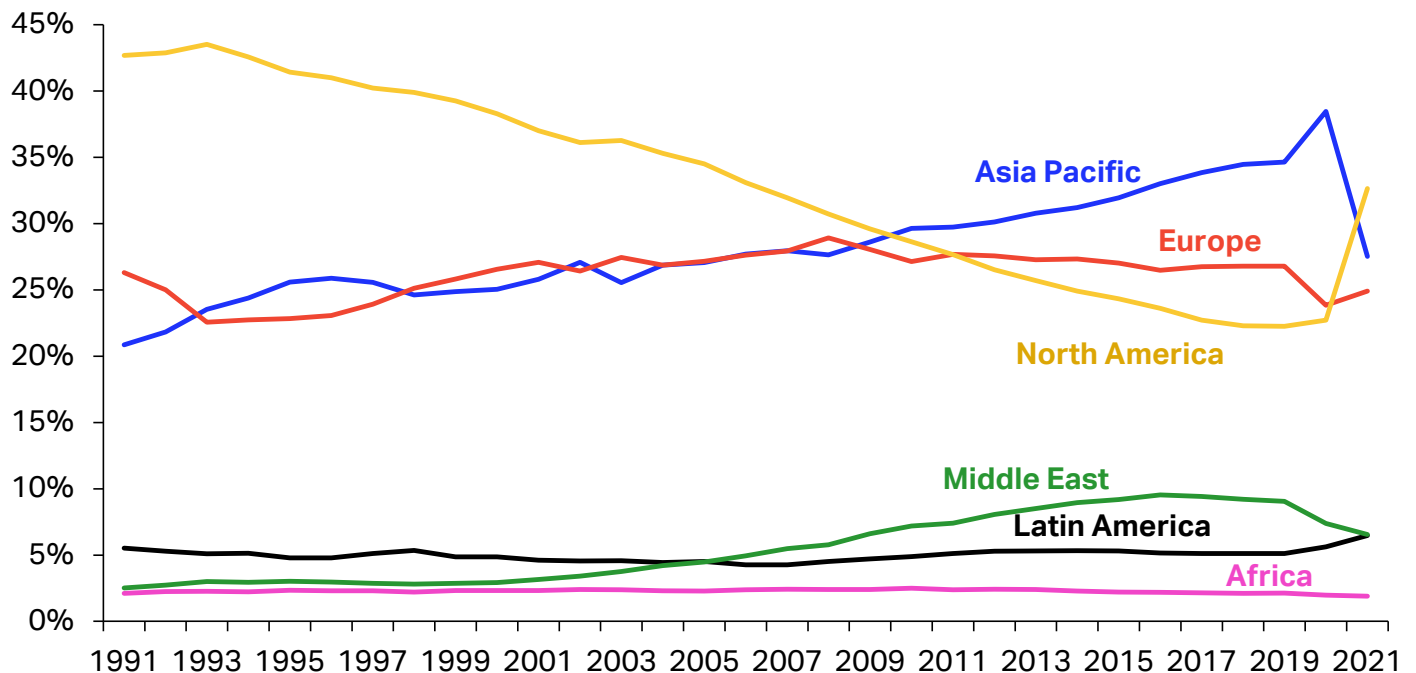


IATA Economics' Chart of the Week

28 January 2022

The distribution of air travel across regions changed in 2021

RPKs based on airline region of origin, % share in total RPKs



Source: IATA Monthly Statistics

- We recently released [air passenger statistics for December 2021](#), and can now evaluate 2021 as a whole. It was a challenging but significantly better year than 2020 as progress on vaccination enabled the reopening of some markets. Tellingly, global passenger volumes (RPKs) rose to 41.6% of 2019 levels in 2021 versus 34.2% in 2020.
- The recovery path was not uniform across the industry. Airlines based in regions with large domestic and short-haul international markets recorded faster traffic improvement on the back of more relaxed travel restrictions. As a result, these airlines increased their share in global RPKs. One example are North American carriers who benefitted from the robust traffic rebound in the US domestic and Central-North American market. This helped to increase their share in industry-wide RPKs from 22% in 2019 to 33% in 2021 – the largest among regions. Latin American and European airlines also grew their share in global air travel (6% and 25% of global RPKs respectively in 2021), mostly thanks to the recoveries seen in the Brazilian domestic and intra-European markets.
- Airlines reliant on long-haul international traffic or based in regions with elevated travel restrictions lost market share in 2021. Middle Eastern carriers, belonging to the former category, flew 7% of global RPKs in 2021, compared with 9% in 2019. Airlines from Asia Pacific reported the largest drop in market share in the industry (28% in 2021 versus 35% in 2019) due to still very weak international traffic to, from, and within the region, and to the zero-COVID policy in China.
- The distribution of air travel across regions will continue to evolve as the industry emerges from the pandemic crisis. Regional shares should return to levels more in line with demand fundamentals in the future as more international routes reopen. How long that will take will depend to a large extent on the strictness of governments' travel restrictions.

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