INTERNATIONAL TRAVEL DRIVES MAY AIR TRAFFIC RECOVERY - IATA

News / Airlines

IATA announced passenger data for May 2022 showing that the recovery in air travel accelerated heading into the busy Northern Hemisphere summer travel season.

Note: We have returned to year-on-year traffic comparisons, instead of comparisons with the 2019 period, unless otherwise noted. Owing to the low traffic base in 2021, some markets will show very high year-on-year growth rates, even if the size of these markets is still significantly smaller than they were in 2019.

- **Total traffic** in May 2022 (measured in revenue passenger kilometers or RPKs) was up 83.1% compared to May 2021, largely driven by the strong recovery in international traffic. Global traffic is now at 68.7% of pre-crisis levels.
- **Domestic traffic** for May 2022 was up 0.2% compared to the year-ago period. Significant improvements in many markets were masked by a 73.2% year-on-year decline in the Chinese domestic market due to COVID-19 related restrictions. May 2022 domestic traffic was 76.7% of May 2019.
- **International traffic** rose 325.8% versus May 2021. The easing of travel restrictions in most

parts of Asia is accelerating the recovery of international travel. May 2022 international RPKs reached 64.1% of May 2019 levels.

“The travel recovery continues to gather momentum. People need to travel. And when governments remove COVID-19 restrictions, they do. Many major international route areas – including within Europe, and the Middle East-North America routes - are already exceeding pre-COVID-19 levels. Completely removing all COVID-19 restrictions is the way forward, with Australia being the latest to do so this week. The major exception to the optimism of this rebound in travel is China, which saw a dramatic 73.2% fall in domestic travel compared to the previous year. Its continuing zero-COVID policy is out-of-step with the rest of the world and it shows in the dramatically slower recovery of China-related travel,” said Willie Walsh, IATA’s Director General.

MAY 2022 (% YEAR ON YEAR)	**WORLD SHARE1??**	**RPK**	**ASK**	**PLF (%-PT)?2**	**PLF (LEVEL)**
Total Market	**100%**	**83.1%**	**52.8%**	**13.1%**	**79.1%**
Africa	1.9%	124.9%	76.8%	14.9%	69.6%
Asia Pacific	27.5%	-4.7%	-8.2%	2.6%	69.6%
Europe	25.0%	258.8%	159.1%	22.4%	80.7%
Latin America	6.5%	99.3%	89.5%	4.0%	80.7%
Middle East	6.6%	279.6%	103.5%	35.4%	76.2%
North America	32.6%	56.3%	36.6%	10.8%	86.0%

1) % of industry RPKs in 2021 2) Year on year change in load factor 3) Load Factor Level

International Passenger Markets

European carriers’ May traffic rose 412.3% versus May 2021. Capacity rose 221.3%, and load factor climbed 30.1 percentage points to 80.6%. The impact of the war in Ukraine remained limited to areas directly impacted.

Asia-Pacific airlines had a 453.3% rise in May traffic compared to May 2021. This is significantly higher than the 295.3% year-on-year gain registered in April 2022. Capacity rose 118.8% and the load factor was up 43.6 percentage points to 72.1%. Improvements in the region are being driven by reduced restrictions in most of the region’s markets, except China.

Middle Eastern airlines' traffic rose 317.2% in May compared to May 2021. May capacity rose 115.7% versus the year-ago period, and load factor climbed 37.1 percentage points to 76.8%. The progressive re-opening of Asian markets is boosting traffic through Gulf hubs.

North American carriers experienced a 203.4% traffic rise in May versus the 2021 period. Capacity rose 101.1%, and load factor climbed 27.1 percentage points to 80.3%. With most restrictions removed for travelers from this region, tourism and a high willingness to travel continue to foster the international recovery as several other routes areas are now outperforming 2019 results.

Latin American airlines' May traffic rose 180.5% compared to the same month in 2021. May capacity rose 135.3% and load factor increased 13.5 percentage points to 83.4%, which was the highest load factor among the regions for the 20th consecutive month. Some routes, including those from Central America to Europe and to North America, are outperforming 2019 levels.

African airlines had a 134.9% rise in May RPKs versus a year ago. May 2022 capacity was up 78.5% and load factor climbed 16.4 percentage points to 68.4%, the lowest among regions.

Domestic Passenger Markets

MAY 2022 (% YEAR O YEAR)	WORLD SHARE1??	RPK	ASK	PLF (%-PT)?2	PLF (LEVEL)?3
Domestic	**62.3%**	**0.2%**	**-3.3%**	**2.9%**	**79.8%**
Dom. Australia	0.8%	34.7%	23.1%	6.5%	75.6%
Domestic Brazil	1.9%	73.1%	89.6%	-7.1%	74.8%
Dom China P.R	17.8%	-73.2%	-64.7%	-18.8%	59.1%
Domestic India	2.2%	405.7%	205.7%	32.4%	81.8%
Domestic Japan	1.1%	132.7%	70.7%	15.2%	56.9%
Domestic US	25.6%	26.1%	15.6%	7.3%	88.7%

1) % of industry RPKs in 2021 2) Year on year change in load factor 3) Load Factor Level

India's domestic RPKs rose 405.7% year-on-year in May, compared to the 78.6% increase recorded in April. In May 2021, India had experienced the country's most severe COVID-19 outbreak.

US domestic traffic was up 26.1% in May, compared to May 2021.

2022 vs 2019

The strong results in most international and domestic markets compared to a year ago is helping passenger demand catch-up to 2019 levels. Total RPKs in May 2022 reached 68.7% of May 2019 levels, which was the best performance against pre-COVID-19 travel so far this year.

Air Passenger Market overview - May 2022 vs the same month in 2019

	WORLD SHARE1??	RPK	ASK	PLF (%-PT)?2	PLF (LEVEL
Total Market	**100%**	**-31.3%**	**-28.9%**	**-2.7%**	**79.1%**
International	37.7%	-35.9%	-34.3%	-1.9%	78.6%
Domestic	62.3%	-23.3%	-19.2%	-4.2%	79.8%

The Bottom Line

“The recovery in travel markets is no less than impressive. As we accelerate towards the peak summer season in the Northern Hemisphere, strains in the system are appearing in some European and North American hubs. Nobody wants to see passengers suffering from delays or cancellations. But passengers can be confident that solutions are being urgently implemented. Airlines, airports and governments are working together, however, standing up the workforce needed to meet growing demand will take time and require patience in the few locations where the bottlenecks are the most severe.

In the longer term, governments must improve their understanding of how aviation operates and work more closely with airports and airlines. Having created so much uncertainty with knee-jerk COVID-19 policy flip-flops and avoiding most opportunities to work in unison based on global standards, their actions did little to enable a smooth ramping-up of activity. And it is unacceptable that the industry is now facing a potential punitive regulatory deluge as several governments fill their post-COVID-19 regulatory calendars. Aviation has delivered its best when governments and industry work together to agree and implement global standards. That axiom is as true post-COVID-19 as it was in the century before.” said Walsh.

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