

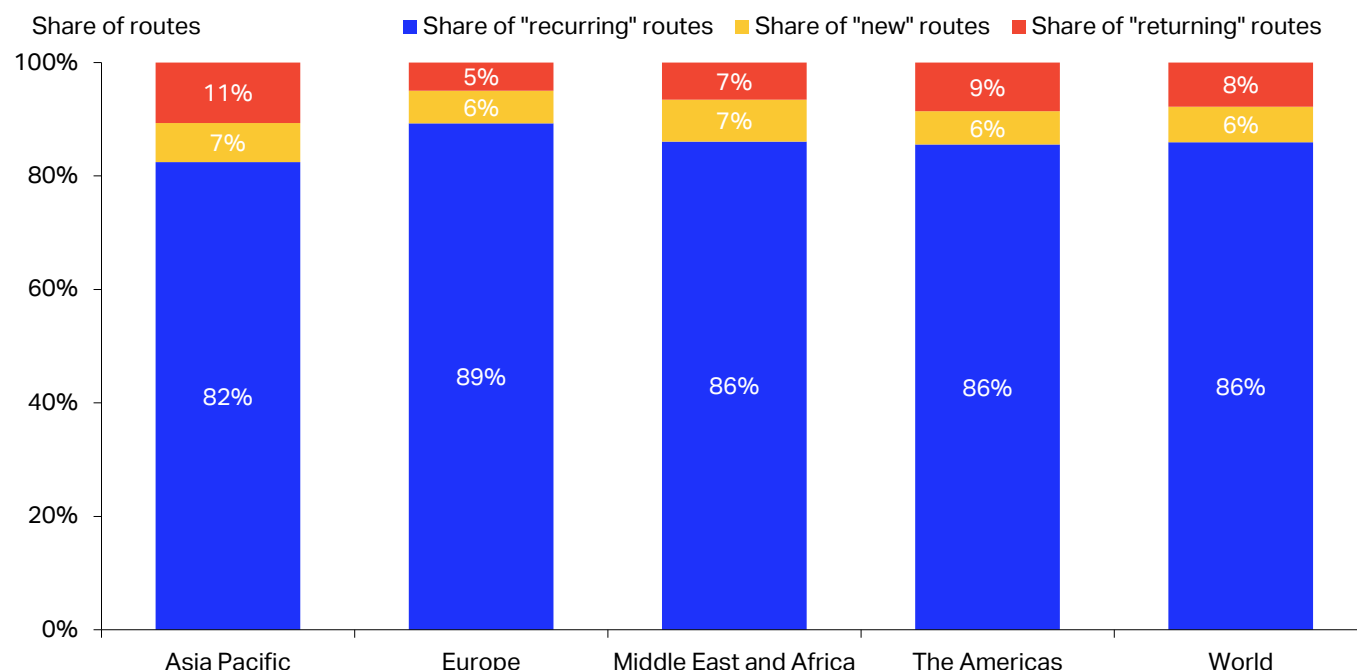


## Chart of the Week

13 September 2024

### Dynamic route churn signals evolving demand patterns

#### Churn in airline routes operated in 2023, compared to the period 2014-2022



Source: IATA Sustainability and Economics, based on data from OAG

- The attention and responsiveness of airlines to evolving consumer demands and needs is clearly represented by the churn in airline routes. In 2023, 67,000 individual, regularly scheduled<sup>1</sup>, routes were operated globally. Of this total number, more than 4,200 (equivalent to 6%) were not flown at any point between 2014 and 2022 (see chart).
- A majority of the entirely new routes – around 3,400 (or 81%) – relate to within-region travel. This includes significant activity within domestic markets, with 619 new routes in the US, 514 in China and 175 in India.
- A total of 5,200 routes returned to operation in 2023 following at least a one-year long break. These routes represent 8% of the 2023 network. The majority of these were suspended during the covid pandemic and returned to operation last year as traffic patterns were restored.
- The largest churn was observed in Asia Pacific, where only 82% of the 2023 route structure was identical to that of 2022. Unsurprisingly, given the later re-opening of the international air transport market in China, the region has the highest share of returning routes in 2023, at 11%. This did not prevent the region from opening 7% uniquely new routes, a feat matched only by the Middle East and Africa.
- Both Europe and the Americas opened new routes to the height of 6% of routes flown in 2023. This slightly lower proportion represents a higher actual number of routes, given these regions' larger market size.
- These developments illustrate that total traffic numbers do not tell the full story about the constantly evolving air transport network. Airlines monitor passenger needs and preferences closely and adjust their network accordingly – as we would expect in a dynamic and competitive market.

<sup>1</sup> In this assessment, routes were counted only if they were operated for at least one IATA season

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