

2023 Allianz Partners

Big Book of Travel Data

by IdeaWorksCompany

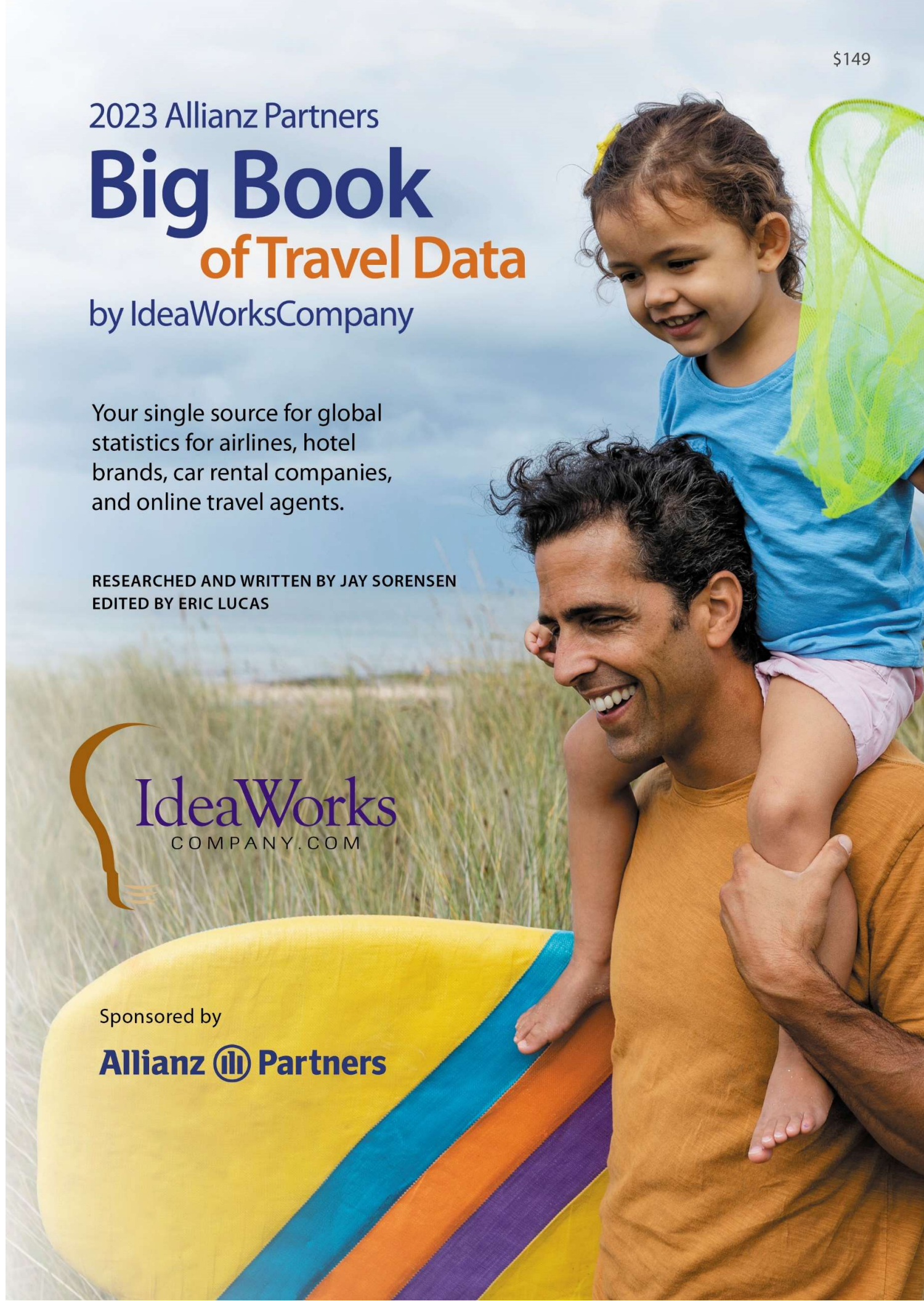
Your single source for global statistics for airlines, hotel brands, car rental companies, and online travel agents.

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About Jay Sorensen, Writer of the Report

Jay Sorensen's research and reports have made him a leading authority on frequent flyer programs and the ancillary revenue movement. He is a regular keynote speaker at ancillary revenue and airline retail conferences and has testified to the US Congress on ancillary revenue issues. His published works are relied upon by airline



Jay with sons Anton and Aleksei at Artist Point in Yellowstone National Park.

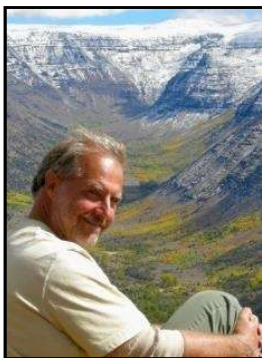
executives throughout the world and include first-ever guides on the topics of ancillary revenue and loyalty marketing.

Mr. Sorensen has 40 years experience in product, partnership, and marketing development.

As president of the IdeaWorksCompany consulting firm, he has helped boost airline

revenue, started loyalty programs and co-branded credit cards, developed products in the service sector, and helped start an airline and other travel companies. His career includes 13 years at Midwest Airlines where he was responsible for marketing, sales, customer service, product development, operations, planning, financial analysis and budgeting. His favorite activities are hiking, exploring and camping in US national parks with his family.

About Eric Lucas, Editor of the Report



Eric Lucas is an international journalist whose work has appeared in Michelin travel guides, Alaska Airlines *Beyond Magazine*, *Epoch Times*, *Westways* and many other publications. Founding editor of *Midwest Airlines Magazine*, he is the author of eight books. Eric has followed and written about the travel industry for more than 30 years. He lives on San Juan Island, Washington, where he grows organic garlic, apples, beans and hay; visit him online at TrailNot4Sissies.com.

Eric, at his favorite summer retreat, Steens Mountain, Oregon.

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Updates to the 2023 Allianz Partners Big Book of Travel Data

This is Version 1.0 of the 2023 Allianz Partners Big Book of Travel Data by IdeaWorksCompany.

Readers are encouraged to visit the IdeaWorksCompany website to check for updates to this Allianz Partners Big Book of Airline Data:

<https://ideaworkscompany.com/reports/>

Updates will include corrections made to the data presented. These will be summarized in the "Updates to the 2023 Allianz Partners Big Book of Travel Data page." The most up-to-date version of the Big Book will be available on the website.



B. Introduction to the Data

The 2023 Allianz Partners Big Book of Travel Data includes more airlines, with data from 229 carriers (up from 219 in the 2022 edition), a new section with total employment for 91 airlines, and new statistics for privately held Best Western Hotels. The Big Book is the travel industry's only one-stop annual compendium of airline, frequent flyer, hotel, car rental, and online travel agency statistics.

By every measure, ours is a travel industry in rapid recovery from the ravages of the pandemic. The data shows that airlines, hotels and other travel providers last year leapt from the pandemic plunge of 2020. With few exceptions, the list of 160 primary airlines in this Big Book show year-over-year increases for 2022.

The large database supporting this Big Book permits the calculation of a global total for the airline industry which reveals a nearly 30+ percent traffic increase for 2022 and a 50 percent revenue increase. Airline travel is naturally linked to hotels, car rental companies, and online travel agencies – a good year for airlines is an indicator of good times for the entire travel sector.

Global Estimate of Airline Traffic and Revenue				
Reporting Year	Traffic	Change	Revenue	Change
2019	4.6 billion		\$840 billion	
2020	1.8 billion	-60.9%	\$350 billion	-58.3%
2021	2.3 billion	+27.8%	\$462 billion	+32.0%
2022	3.0 billion	+30.4%	\$693 billion	+50.0%
Source: 2023 Allianz Partners Big Book of Travel Data by IdeaWorksCompany				

This publication is your single source of data for passenger traffic, airline revenue, frequent flyer enrollment, and employment for airlines from Aegean in Europe to Zhuhai in China. The data collection process began in January of this year and was completed in July to allow a publication date of August 2023. It's a significant undertaking with a review of 300 airlines, and a search for the world's leading hotel groups, car rental companies, and online travel agencies for inclusion in the Big Book. The information is presented in multiple formats to create user-friendly access to the data.

The first part of the Big Book contains passenger traffic results for 160 primary airlines and 49 subsidiary airlines. The second portion contains revenue results for 125 primary airlines and 43 subsidiary airlines. The last airline sections provide membership data for 53 frequent flyer programs and employment totals for 91 carriers. It's important to understand the distinction between primary and subsidiary airlines:

- **Primary airlines** include individual airlines not affiliated with a corporate group structure such as Aeromexico and Copa Airlines. Group airlines are also included. These groups feature multiple carriers under a single corporate ownership structure. Examples of groups include AirAsia Aviation Group and Air France/KLM Group.
- **Subsidiary airlines** are individually identified airlines under an airline group (also known as the corporate parent). The carriers listed do not always represent the full list of airlines operating under the group umbrella. The listing is limited to disclosures made by the parent company, and these may not be comprehensive; groups often omit smaller operations from the annual report.

There are 70+ pages in the airline section of this Big Book and two features are designed to help keep users on track through the many tables. Each data section will use a consistent highlight color for the traffic and revenue data. In addition, tables offer “line” numbers for individual results. For tables offering high to low results, the individual results appear as a “rank.”

Passenger traffic typically represents one way passengers, with connections between flights counted as a single trip. Some airlines, such as low cost carriers, count passengers on a segment basis; a connection passenger would represent two trips. Revenue is often described by airlines as “operating revenue” which includes a variety of sources such as passenger fares, ancillary revenue, air cargo, and services sold to other airlines such as catering and ground handling. Some disclosures were very scant and the revenue type could not be determined.

The reporting period focuses on 2022. For the majority of airlines, this is the calendar year of January through December. The most recent reporting period was selected for this Big Book. The source for information was almost always an annual report found at the investor relations page of an airline website. There are a variety of sources identified in the tables with official financial documents being preferred.

The source data for all disclosures is noted in the Appendix section at the end of the document.

C. Airline Traffic for the 2022 Period

Primary Airlines in Alphabetical Order

This section provides annual passenger traffic information for 160 primary airlines in alphabetical order from Aegean Airlines to Yamal Airlines. Primary airlines include individual carriers, such as Air Greenland and Allegiant, not affiliated with a corporate group structure. Group airlines are also included. These groups feature multiple carriers under a single corporate ownership structure. Examples of groups include Air China and Lufthansa. Using the example of Lufthansa Group, this structure includes Austrian, Brussels, Eurowings, Lufthansa Airlines, and SWISS as subsidiary airlines under the group. Traffic detail for subsidiary airlines is provided in the section which follows the primary airlines listing. Please refer to section B of the Big Book (Introduction to the Data) for information describing data collection, reporting periods, and data sources. The 2022 versus 2021 traffic increase among all primary airlines was 86.3 percent (using weighted averages).

Traffic – Primary Airlines – Alphabetical					
Line	Airlines	Annual Passengers	Traffic Change (from prior annual period)	Reporting Period	World Region
1	Aegean Airlines	12,465,000	73.3%	Calendar 2022	Europe
2	Aeroflot Group	40,689,900	-11.2%	Calendar 2022	Europe
3	Aerolineas Argentinas	11,489,000	139.4%	Calendar 2022	Latin America
4	Aeromexico *	21,724,000	31.2%	Calendar 2022	Latin America
5	Air Arabia	12,800,000	189.6%	Calendar 2022	Middle East & Africa
6	Air Astana Group	7,350,000	11.4%	Calendar 2022	Asia & South Pacific
7	Air Canada Group	36,144,000	174.0%	Calendar 2022	US & Canada
8	Air Caraibes	2,350,000	165.5%	Calendar 2022	Latin America
9	Air China Group	38,605,770	-44.1%	Calendar 2022	Asia & South Pacific
10	Air Corsica	2,000,000	No 2021 data	Calendar 2022	Europe
11	Air Do	2,041,096	75.7%	FY ended 31 March 2023	Asia & South Pacific
12	Air Dolomiti	1,387,548	206.2%	Calendar 2022	Europe
13	Air Europa *	10,000,000	100.0%	Calendar 2022	Europe
14	Air France/KLM Group	64,968,000	45.3%	Calendar 2022	Europe
15	Air Greenland	416,000	34.6%	Calendar 2022	Europe
■ Refer to page 9 for details. * Some data for airline is estimated, see Appendix Table continues next page.					

Traffic – Primary Airlines – Alphabetical <i>Continued</i>					
Line	Airlines	Annual Passengers	Traffic Change (from prior annual period)	Reporting Period	World Region
16	Air India	15,608,273	96.0%	Calendar 2022	Asia & South Pacific
17	Air New Zealand ■	7,745,000	-10.5%	FY ended 30 June 2022	Asia & South Pacific
18	Air Nostrum	5,200,000	No 2021 data	Calendar 2022	Europe
19	Air Serbia	2,760,000	73.9%	Calendar 2022	Europe
20	Air Seychelles	215,245	125.5%	Calendar 2022	Middle East & Africa
21	AirAsia Aviation Group	24,247,725	403.9%	Calendar 2022	Asia & South Pacific
22	AirAsia X Malaysia ■	417,195	-63.5%	July 2021-Dec 2022 Period	Asia & South Pacific
23	AirAsia X Thailand ■	279,707	-41.0%	July 2021-Dec 2022 Period	Asia & South Pacific
24	airBaltic	3,342,000	105.3%	Calendar 2022	Europe
25	Airlink	3,000,000	No 2021 data	Calendar 2022	Middle East & Africa
26	Akasa Air	776,118	No 2021 data	Calendar 2022	Asia & South Pacific
27	Alaska Air Group	41,468,000	28.0%	Calendar 2022	US & Canada
28	Allegiant Air	16,630,138	21.9%	Calendar 2022	US & Canada
29	Alliance India	1,514,061	47.8%	Calendar 2022	Asia & South Pacific
30	American	199,288,000	20.8%	Calendar 2022	US & Canada
31	ANA Group	38,747,379	106.3%	FY ended 31 March 2023	Asia & South Pacific
32	Arkia Israel Airlines	1,184,477	101.6%	Calendar 2022	Middle East & Africa
33	Asiana Airlines Group	8,242,248	61.3%	Calendar 2022	Asia & South Pacific
34	Atlantic Airways	350,599	74.9%	Calendar 2022	Europe
35	Avelo Airlines	1,200,000	247.8%	Calendar 2022	US & Canada
36	Avianca	24,998,000	No 2021 data	Calendar 2022	Latin America
37	Azimuth Airlines	1,900,000	-9.3%	Calendar 2022	Europe
38	Azul	27,485,369	17.9%	Calendar 2022	Latin America
39	Azur Air	1,126,631	-70.3%	Calendar 2022	Europe
■ Refer to page 9 for details. * Some data for airline is estimated, see Appendix Table continues next page.					

Traffic – Primary Airlines – Alphabetical <i>Continued</i>					
Line	Airlines	Annual Passengers	Traffic Change (from prior annual period)	Reporting Period	World Region
40	Bangkok Airways	2,653,600	394.8%	Calendar 2022	Asia & South Pacific
41	Boliviana	4,137,149	26.0%	Calendar 2022	Latin America
42	Breeze Airways	1,049,000	229.9%	Calendar 2022	US & Canada
43	Cathay Pacific	2,803,784	291.0%	Calendar 2022	Asia & South Pacific
44	Cebu Pacific Air	14,800,000	333.9%	Calendar 2022	Asia & South Pacific
45	China Airlines	1,502,564	768.4%	Calendar 2022	Asia & South Pacific
46	China Eastern Group	42,510,460	-46.3%	Calendar 2022	Asia & South Pacific
47	China Southern Group	62,636,060	-36.4%	Calendar 2022	Asia & South Pacific
48	Copa Airlines	10,334,000	68.4%	Calendar 2022	Latin America
49	Croatia Airlines	1,453,224	84.4%	Calendar 2022	Europe
50	CSA Czech Airlines *	185,000	No 2021 data	Calendar 2022	Europe
51	Daily Air	84,350	0.5%	Calendar 2022	Asia & South Pacific
52	Delta	171,354,000	30.8%	Calendar 2022	US & Canada
53	EasyFly	1,917,401	34.6%	Calendar 2022	Latin America
54	easyJet ■	69,700,000	241.7%	FY ended 30 Sept. 2022	Europe
55	Edelweiss Air	2,190,000	No 2021 data	Calendar 2022	Europe
56	El Al	4,181,569	203.7%	Calendar 2022	Middle East & Africa
57	Emirates Airline	43,626,000	122.6%	Calendar 2022	Middle East & Africa
58	Ethiopian Airlines ■	8,680,301	50.2%	FY ended 30 June 2022	Middle East & Africa
59	Etihad Airways *	10,300,000	194.3%	Calendar 2022	Middle East & Africa
60	EVA Air Group	2,206,355	653.8%	Calendar 2022	Asia & South Pacific
61	Fiji Airways	1,300,000	No 2021 data	Calendar 2022	Asia & South Pacific
■ Refer to page 9 for details. * Some data for airline is estimated, see Appendix Table continues next page.					