

Informal Video Teleconference – APAC - COVID 19 ATM Operations and Contingency co-ordination

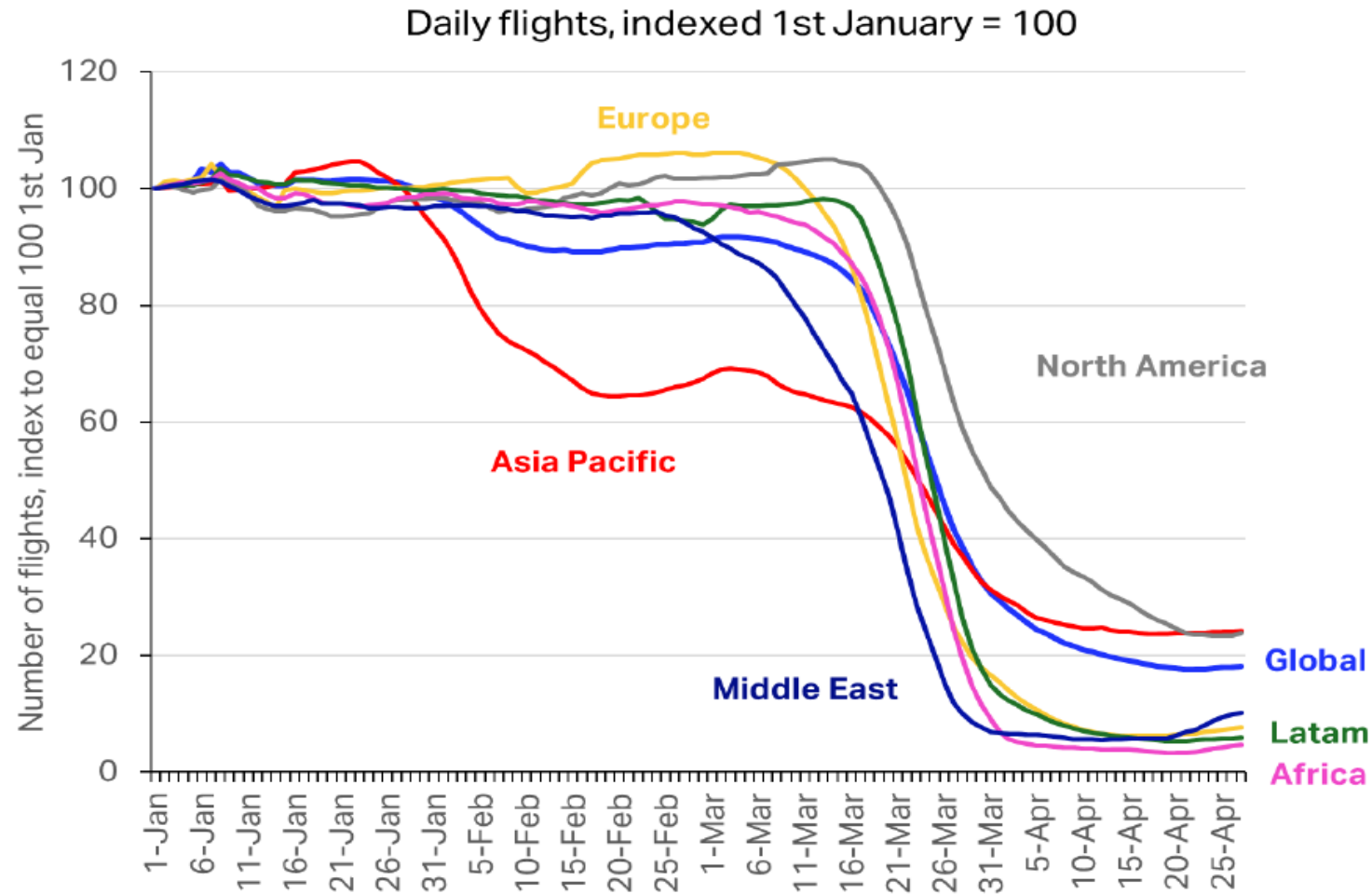
BRIEFING:

IATA JUNE 2020 - COVID 19 Impact



Worldwide flights were 72% lower at the end of Q1

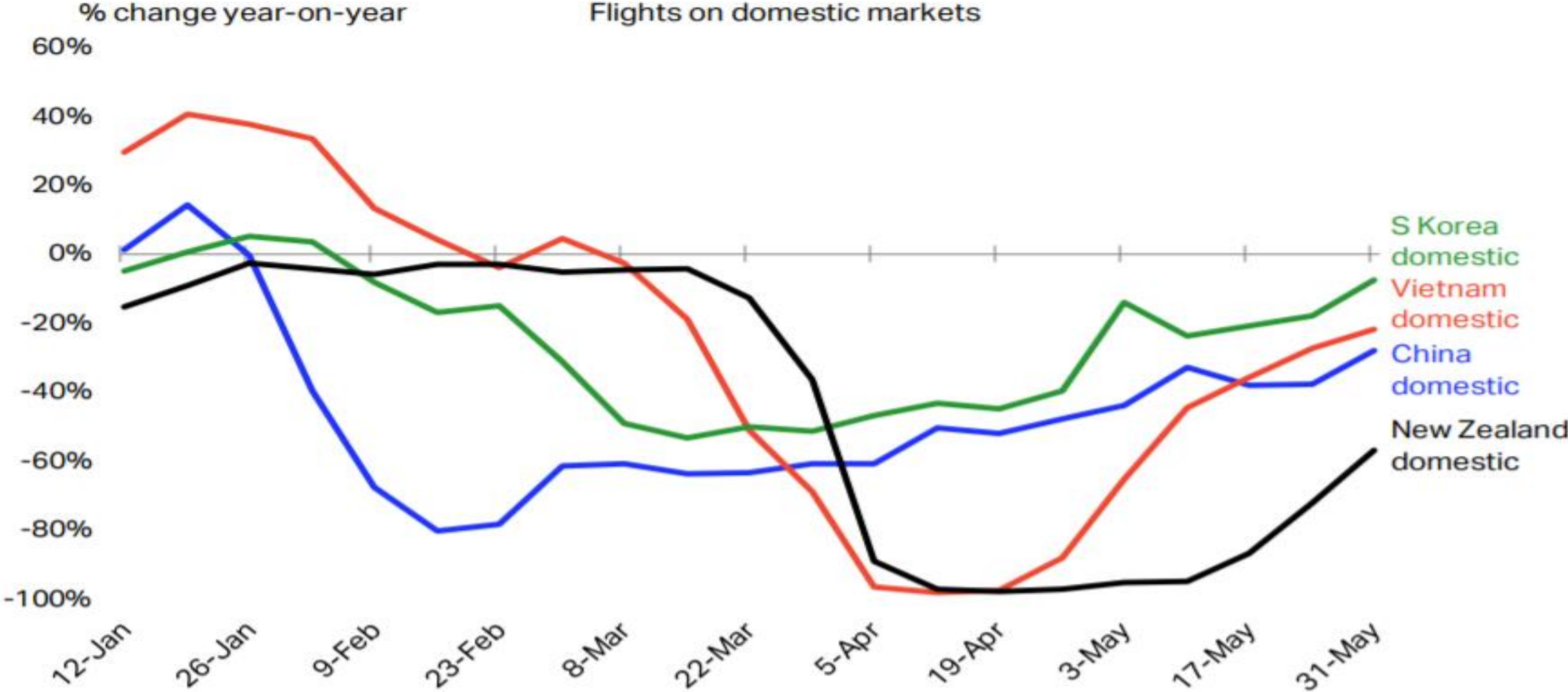
As of April 27th, flights further reduced by 82% relative to January 1st 2020



SOME ONGOING ISSUES:

- Re opening of borders
- Health check requirements imposed on international flights
- Ongoing quarantine requirements
- Social distancing on flights
- Public confidence in flying and visiting certain destinations
- Ticket costs

Domestic Asia Pacific recovery points to improving demand in May

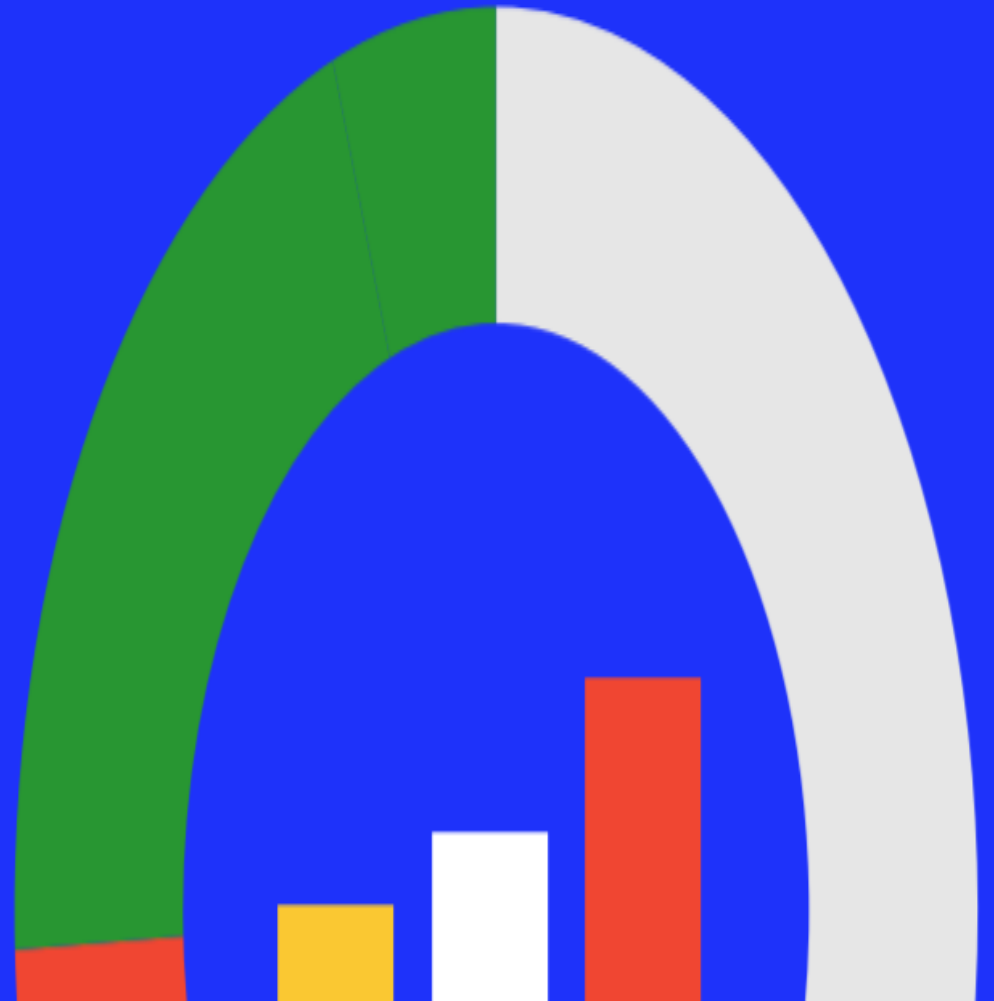


Source: IATA Economics analysis based on data provided under license by FlightRadar24. All rights reserved.



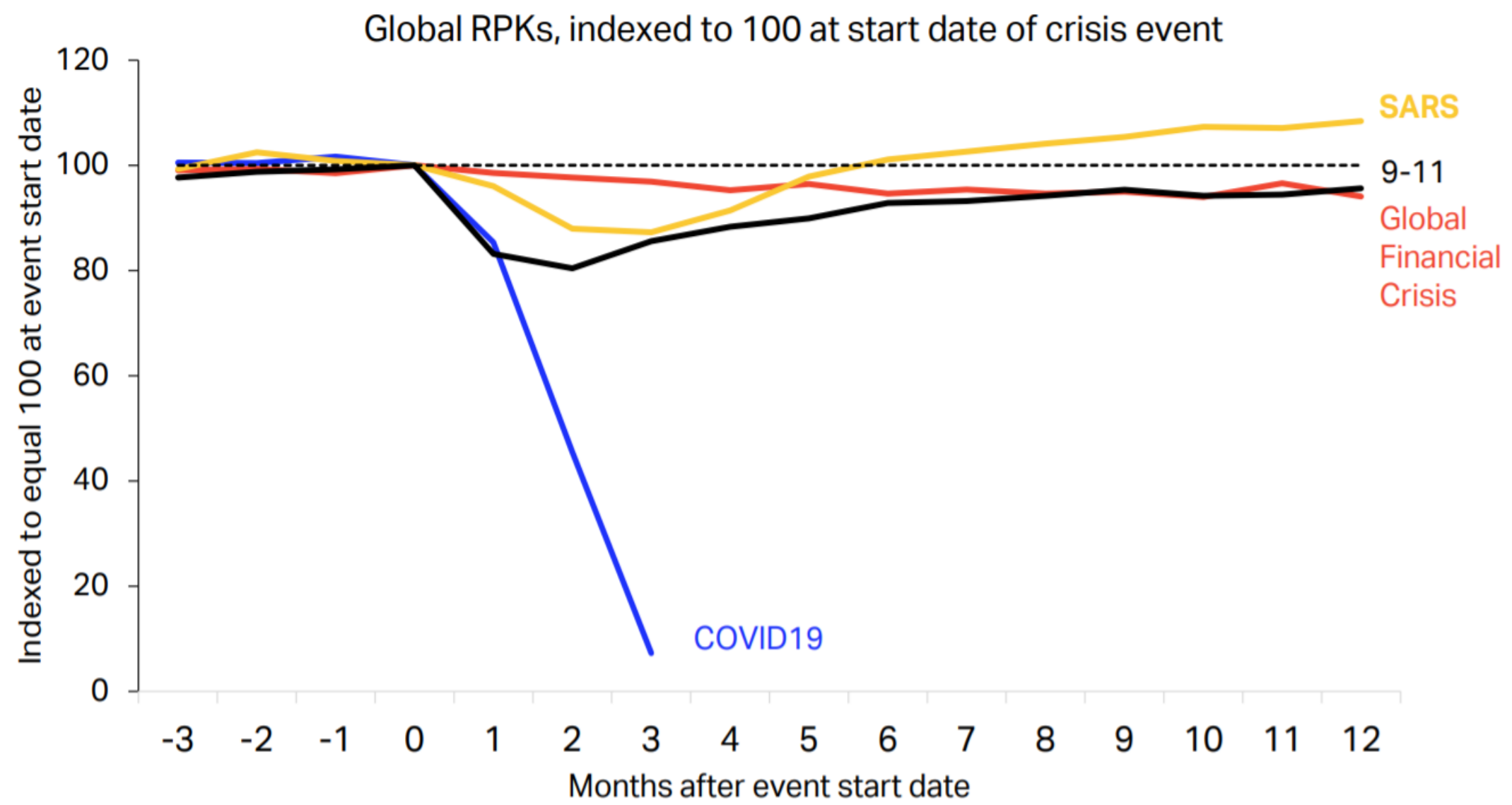
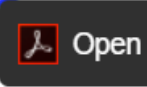
COVID-19

Flexibility will be critical to
success in first year of restart



Depth of COVID19 impact far exceeds previous crises

RPKs 20% fall after 9-11 and 12% after SARS vs 95% fall in April 2020

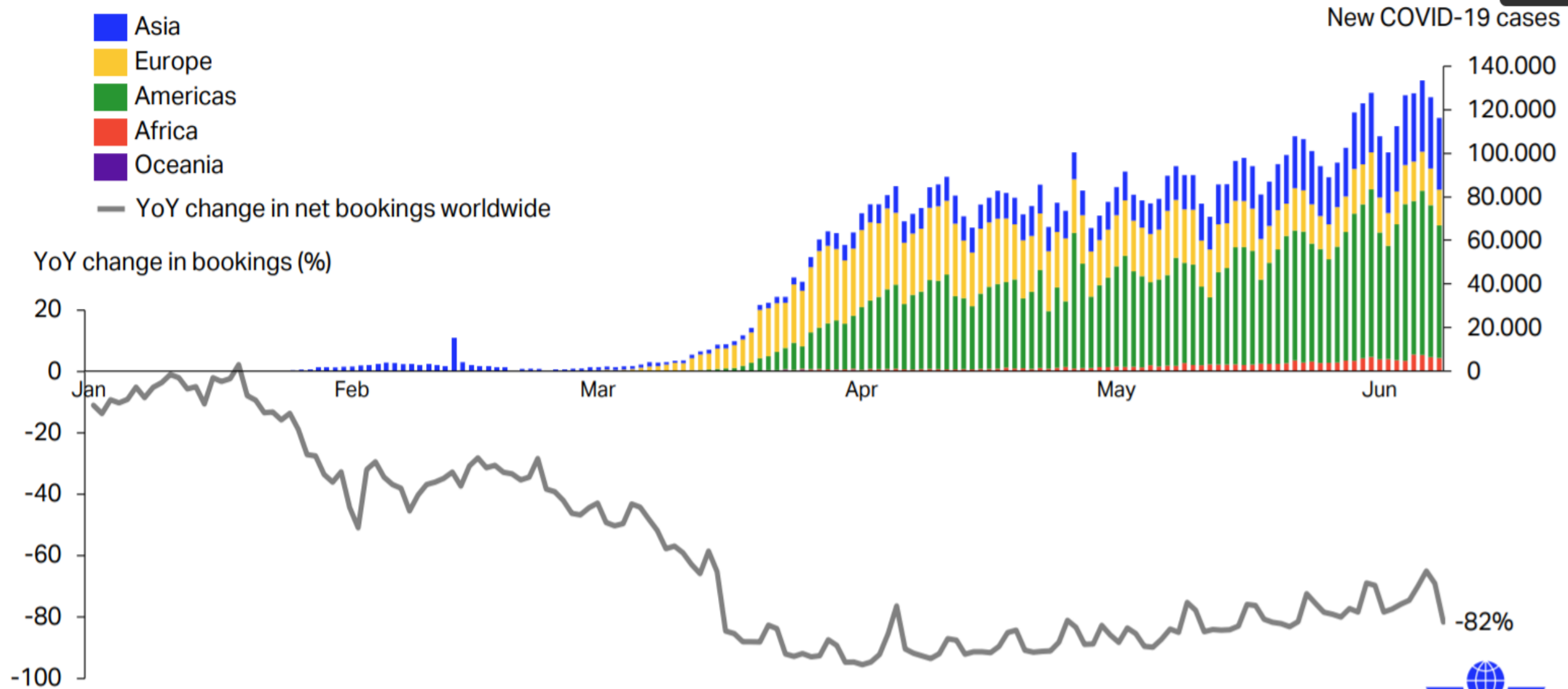


Source: IATA Economics using data from IATA Statistics



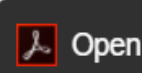
1st wave of COVID-19 far from over & bookings are low

Airlines cannot plan schedules for N Winter season with any certainty

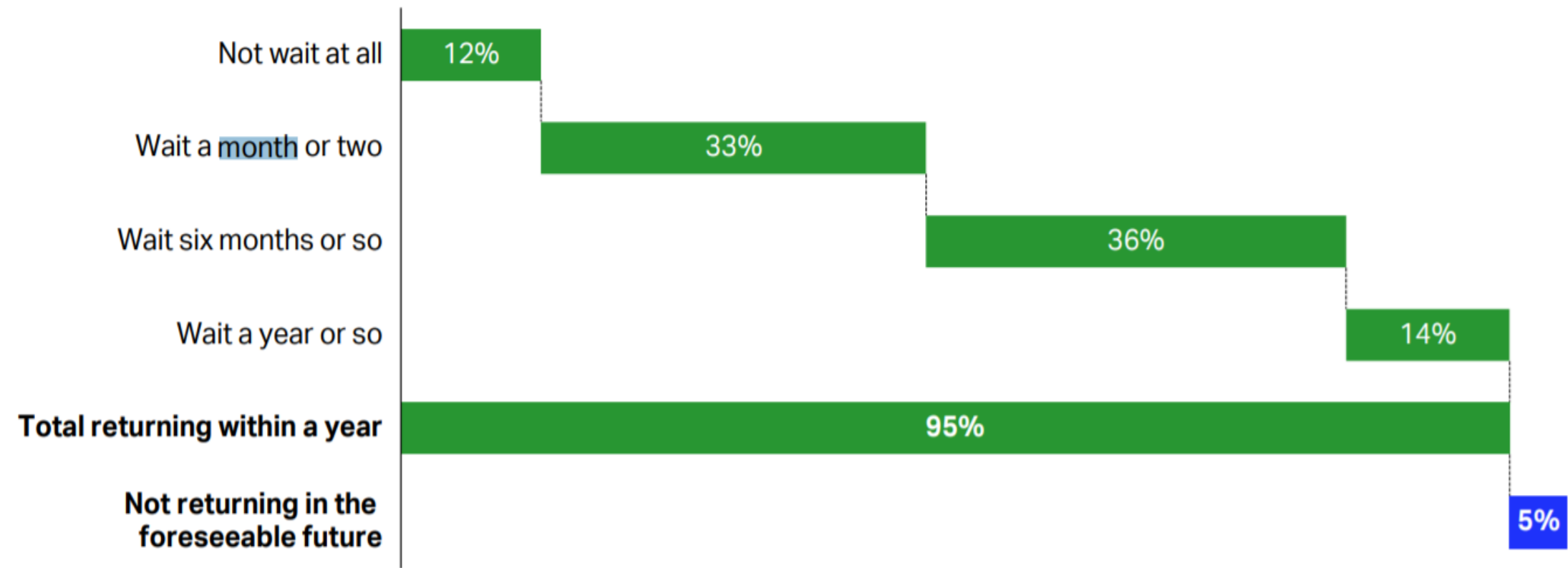


Latest survey shows passengers even more cautious

Now only 45% will fly within 1-2 months. Previous survey shows 60%



Once the pandemic has subsided, how long would you wait, if at all, to return to your usual travel plans?



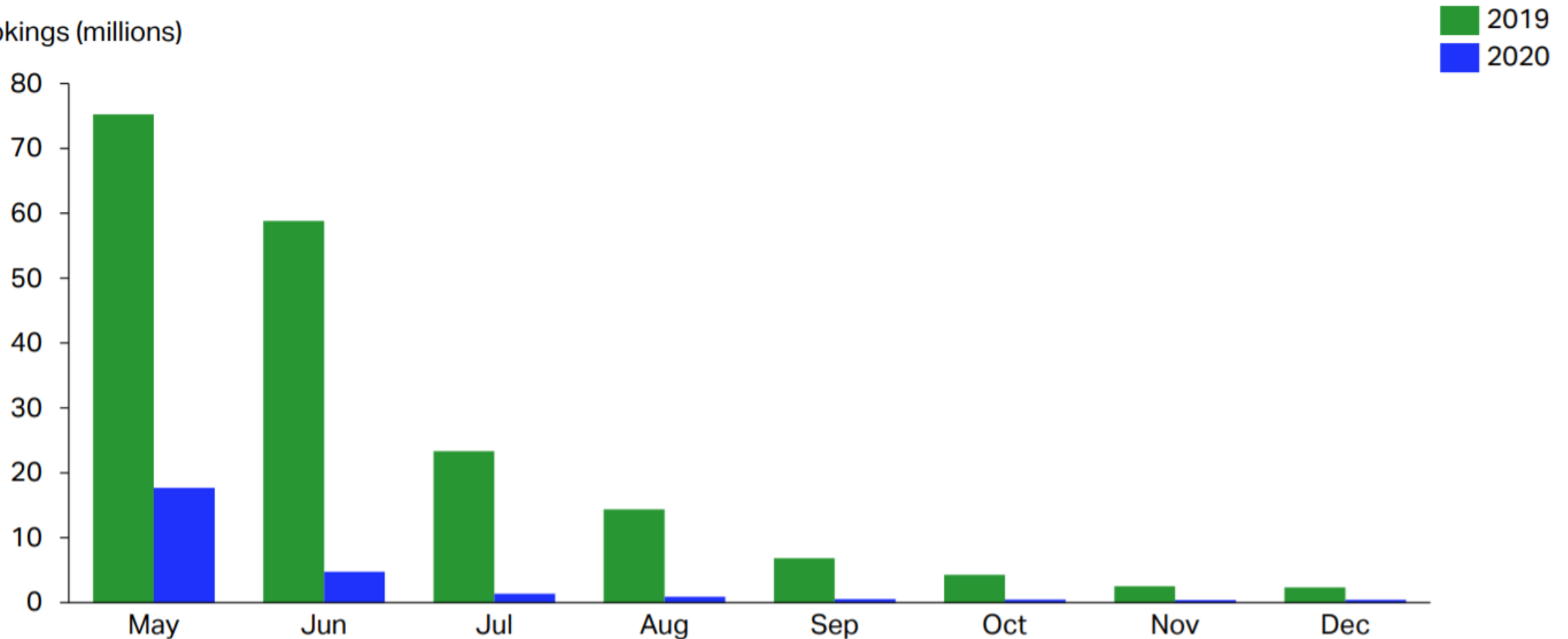
No sign of rapid return to travel even in summer months

Airlines must plan winter schedules now but zero visibility of demand

Open i

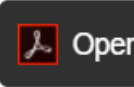
Net bookings (sales minus refunds) made in May 2019 vs. 2020, by month of travel

Bookings (millions)

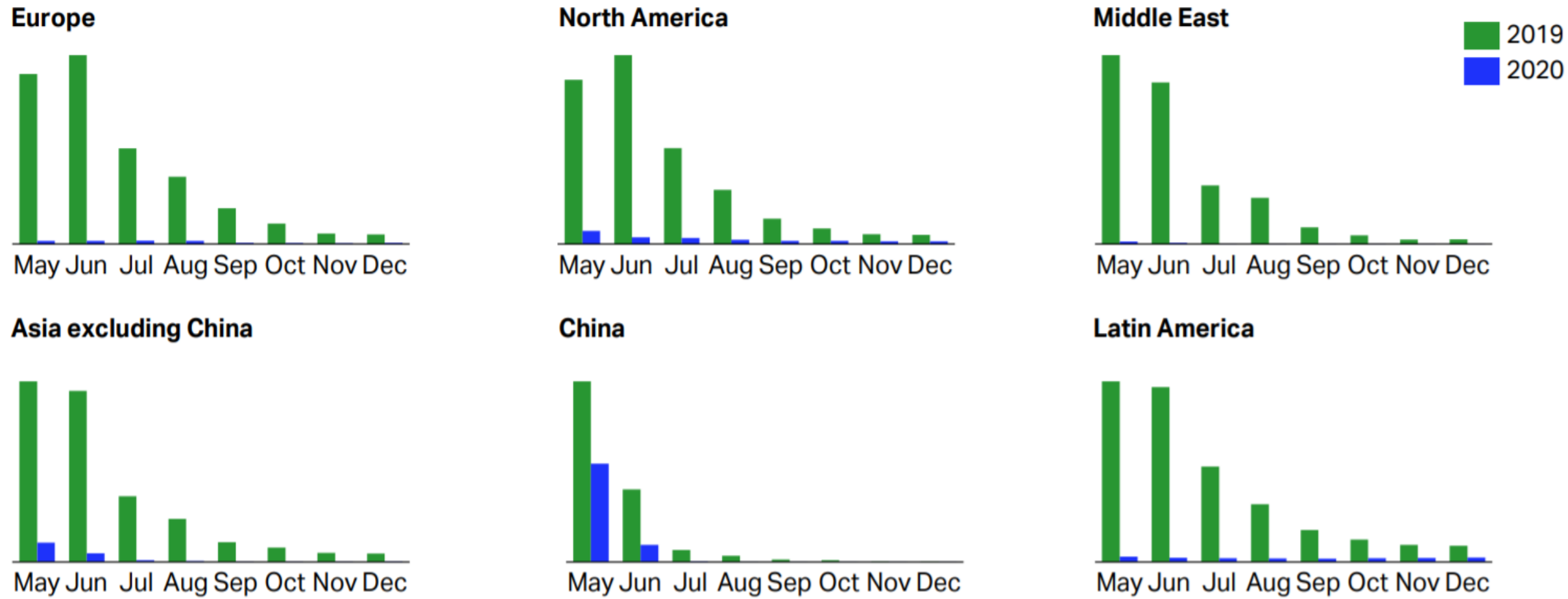


Lack of demand visibility widespread across regions

Airlines have little evidence on which to schedule restart network



Net bookings (sales net of refunds) in May 2019 vs. May 2020 for travel in subsequent months, by region



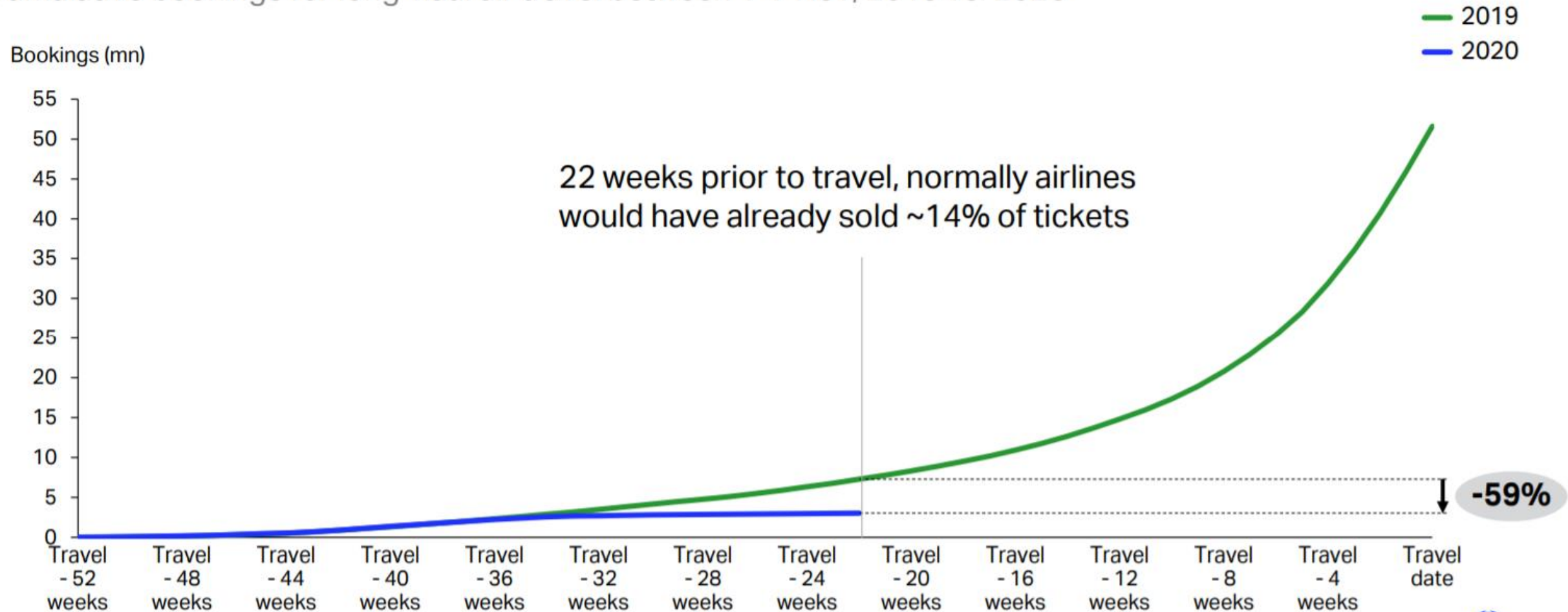
Source: IATA Economics using data from DDS



Demand for long-haul travel remains close to zero

Normally airlines would have sold 14% of tickets for start of winter season

Cumulative bookings for long-haul air travel between 1-7 Nov, 2019 vs. 2020



SOME ONGOING ISSUES cont'd:

- Re opening of borders
- Health check requirements imposed on international flights
- Ongoing quarantine requirements
- Social distancing on flights
- Public confidence in flying and visiting certain destinations
- Ticket costs
- Restoring public confidence in Air travel
 - IATA will be working hard to restore confidence



Useful links:

- <https://www.iata.org/en/programs/covid-19-resources-guidelines/covid-gov-mitigation/>

Other Resources:

[Interactive COVID-19 Travel Regulations Map](#) – contains information on entry/transit regulations, health entry requirements, airports closed/open, borders closed/open, and flight suspensions

[COVID-19 Dashboard on state & airport restrictions](#) (NOTAM and AIS data)

[COVID-19 Contingency related differences \(CCRD\)](#) presenting alleviations in safety operational measures



THANK YOU