

# COVID-19 Impact - Global Overview

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April 5-6, 2021

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IATA Regional Vice President

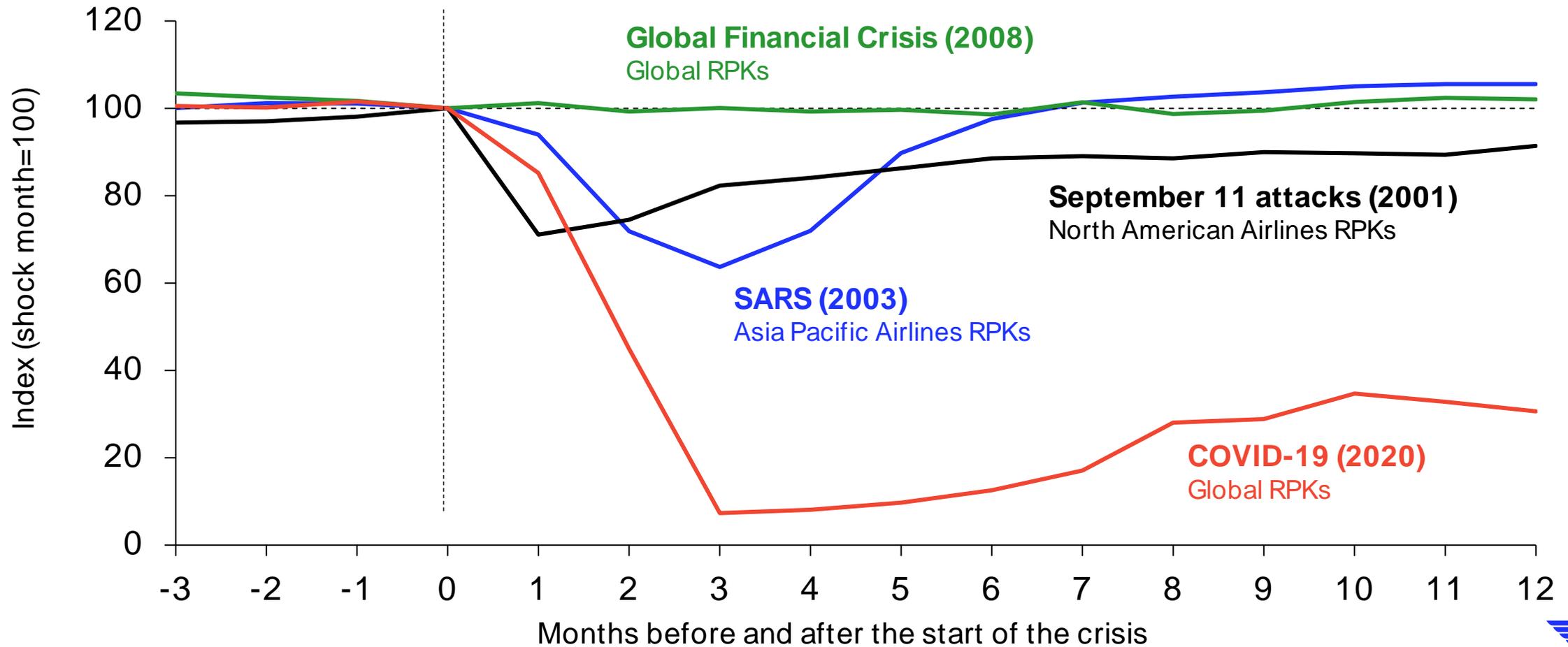
Africa and the Middle East



# COVID-19 has been an unprecedented shock

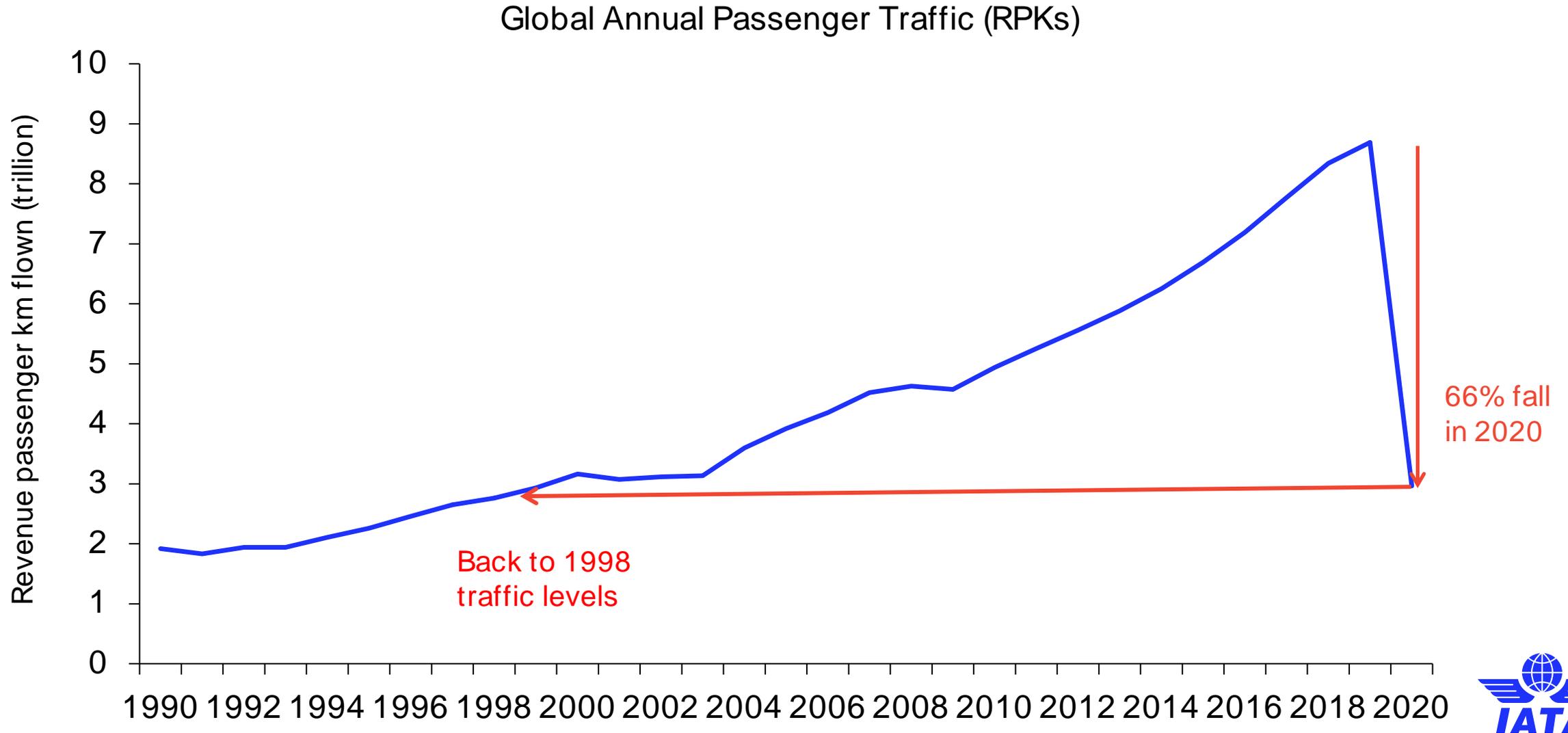
This shock to air travel has been larger and longer lasting than others

## Impact of past shocks on air travel\*



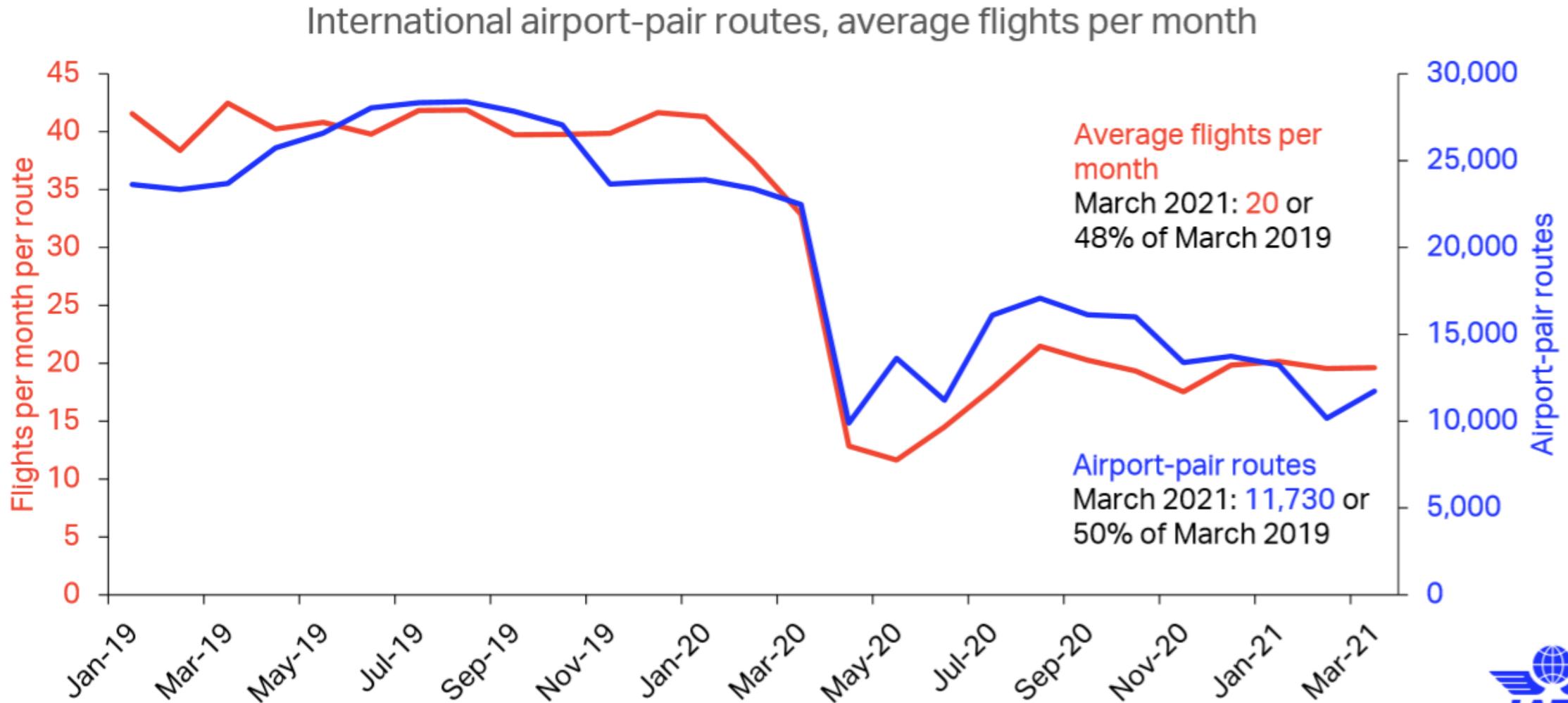
# Air travel collapsed 66% in 2020 returning to 1998 levels

At the low point in April 2020 global RPKs were down 94% on April 2019



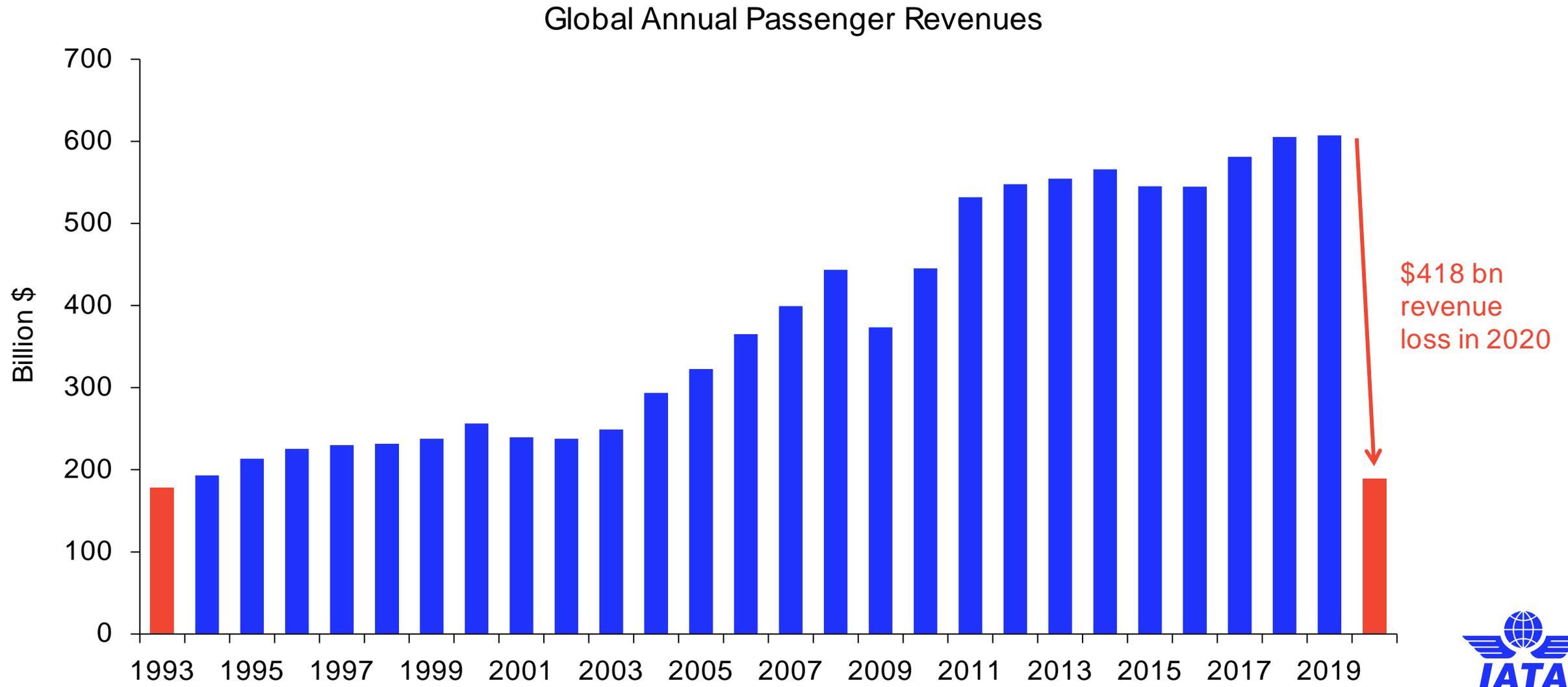
# International air services remain near to lows

March 2021 routes only 50% of normal, frequencies only 48% of normal



# Passenger revenues fell \$418 billion in 2020

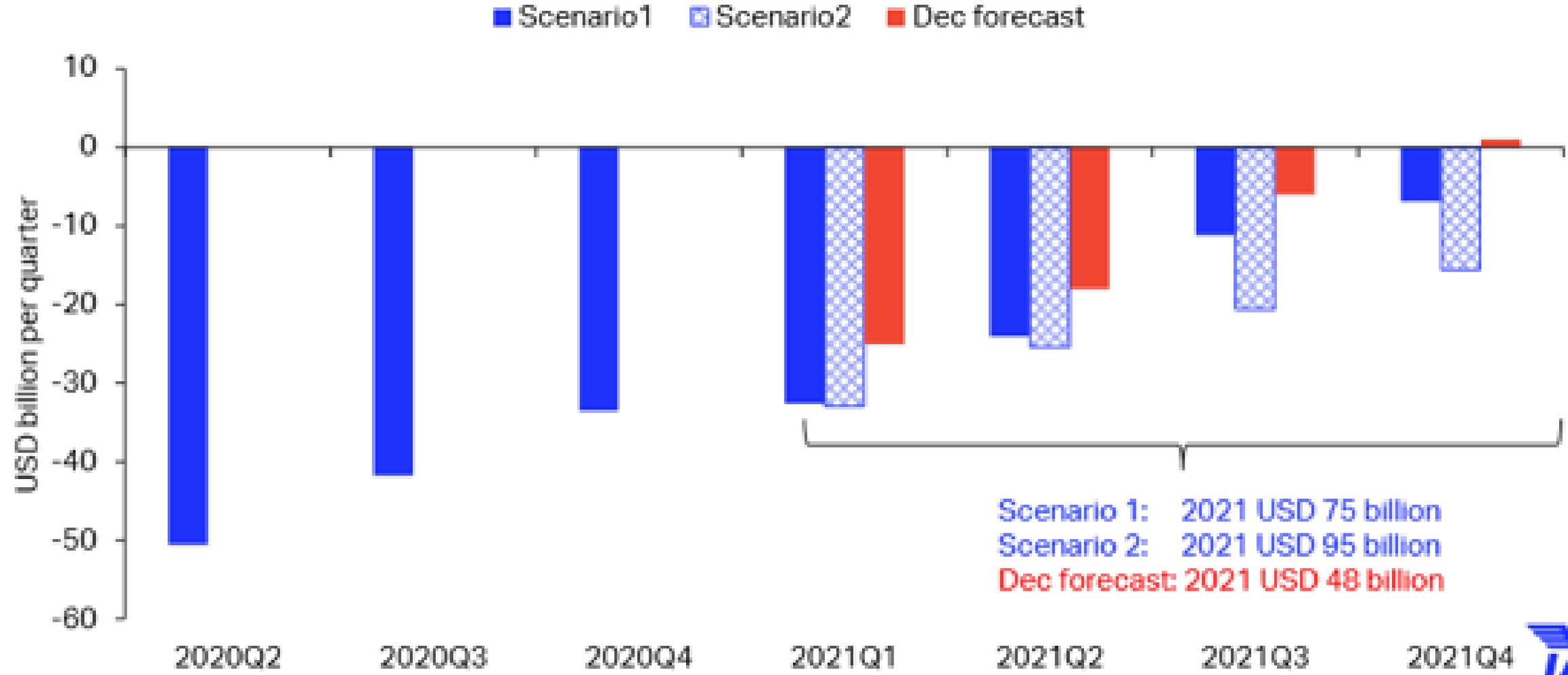
Weak yields cut revenues more than pax numbers - back to 1993 levels



# Airlines' cash burn worse than forecast in December

## Delay in travel recovery implies 2021 cash burn of USD 75-95 billion

Global airline industry cash burn forecast, USD billion per quarter



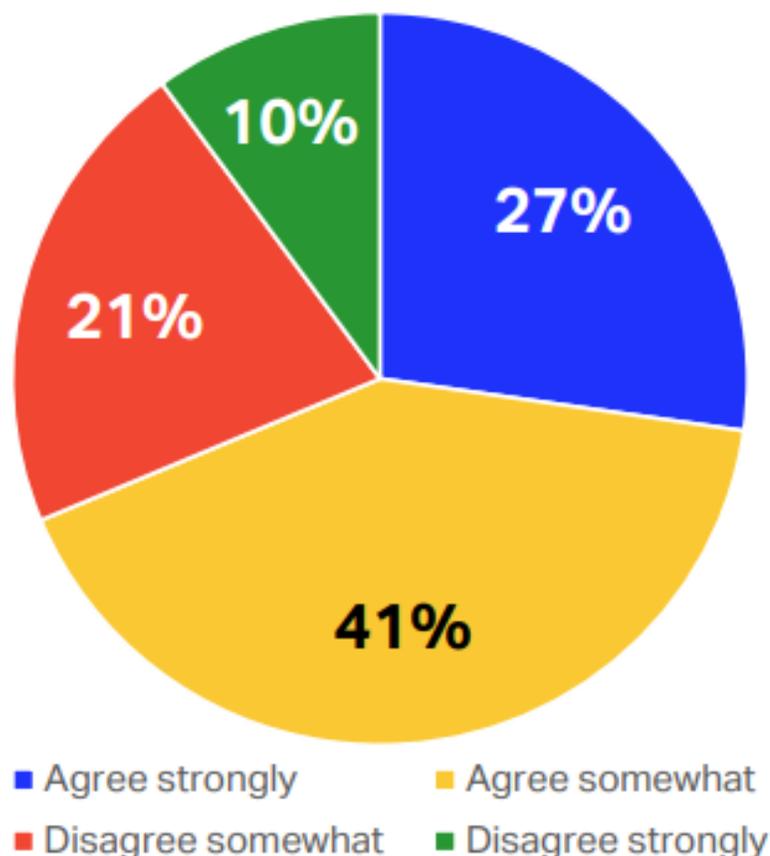
Scenario 1: 2021 USD 75 billion  
 Scenario 2: 2021 USD 95 billion  
 Dec forecast: 2021 USD 48 billion



# Travel restrictions and quality of life

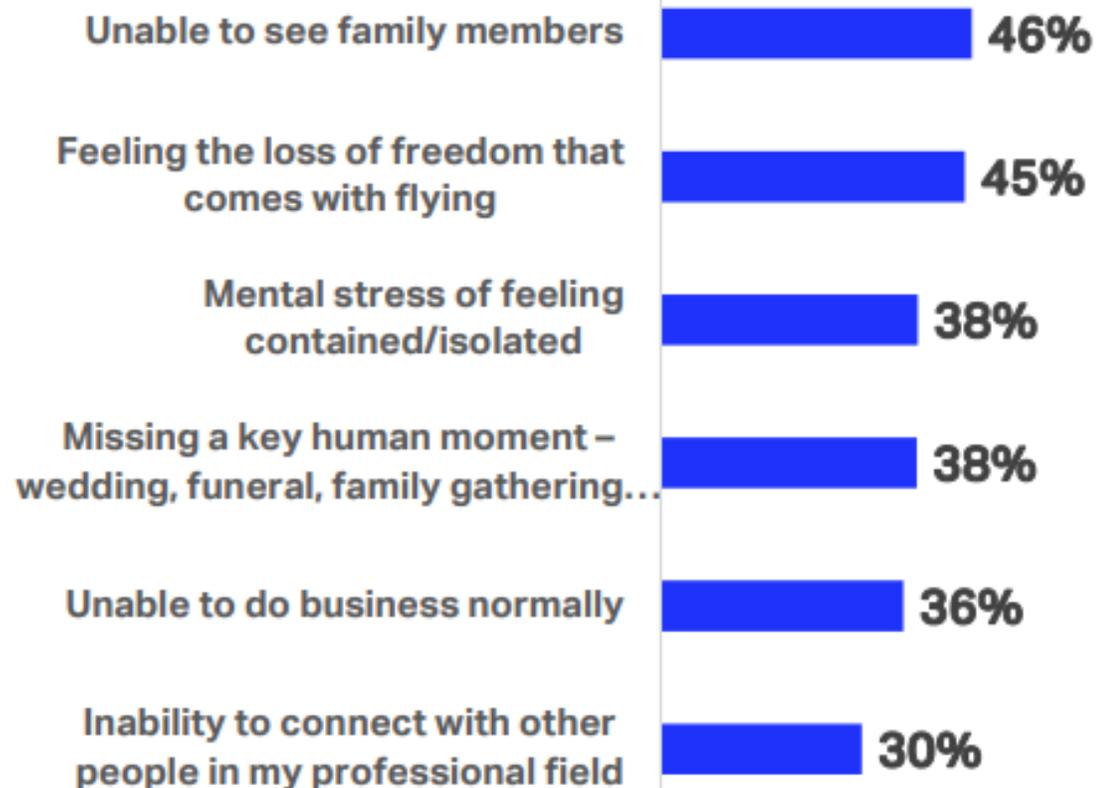
**68%**  
say travel restrictions have negatively impacted their quality of life.

Quality of Life Has Suffered As A Result of Travel Restrictions



Personal Impact of Travel Restrictions

*Check all that apply*

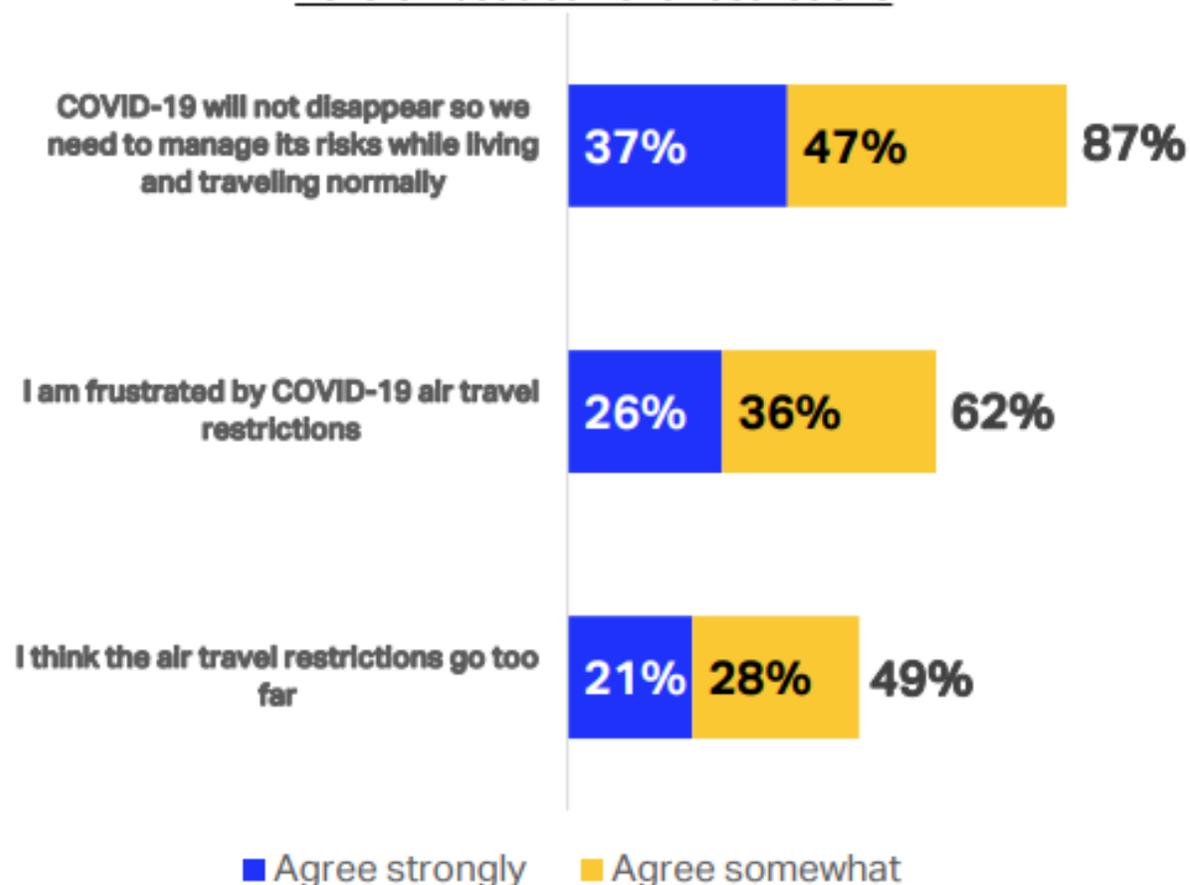


\*Numbers may not always add up due to rounding.

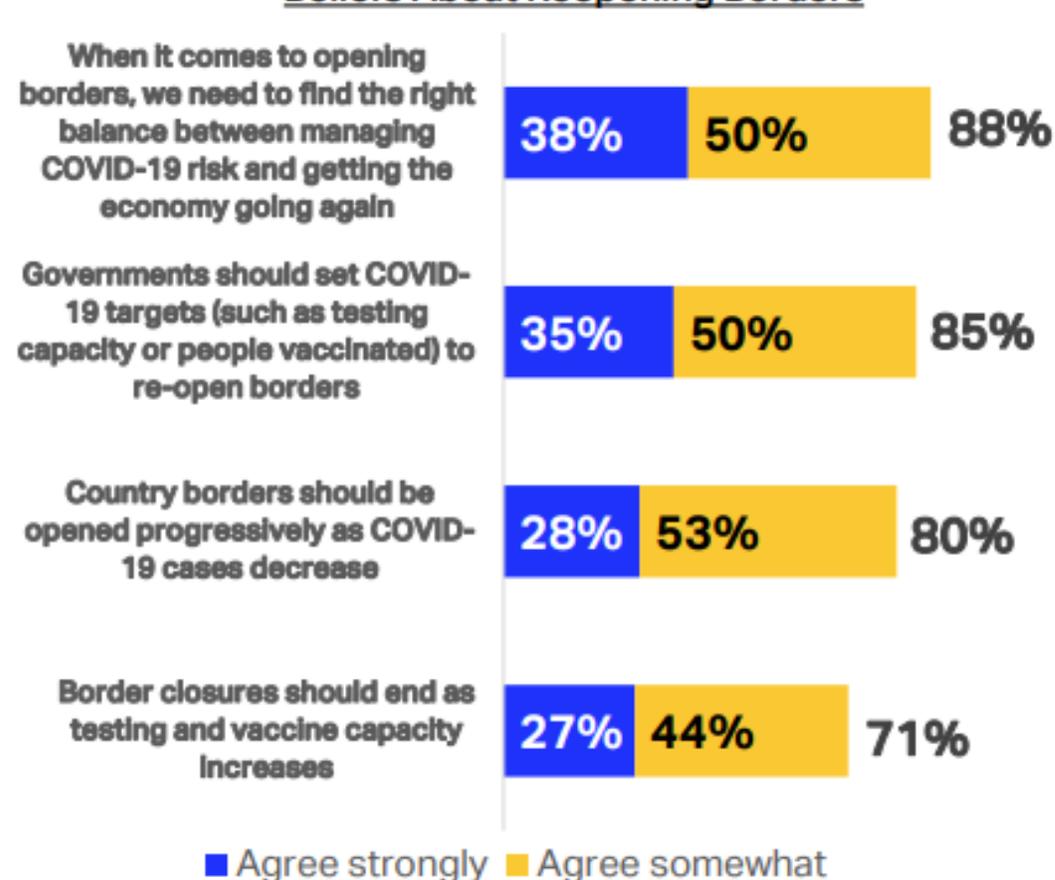
Q26c. Do you agree strongly, agree somewhat, disagree somewhat or disagree strongly with each of the following statements? My quality of life has suffered as a result of air travel restrictions. Q28. Which of the following impacted you personally as a result of COVID-19 travel restrictions? Please check all that apply.

# Balancing COVID-19 risk versus the economic benefit of re-opening borders

## Beliefs About Current Restrictions\*



## Beliefs About Reopening Borders\*



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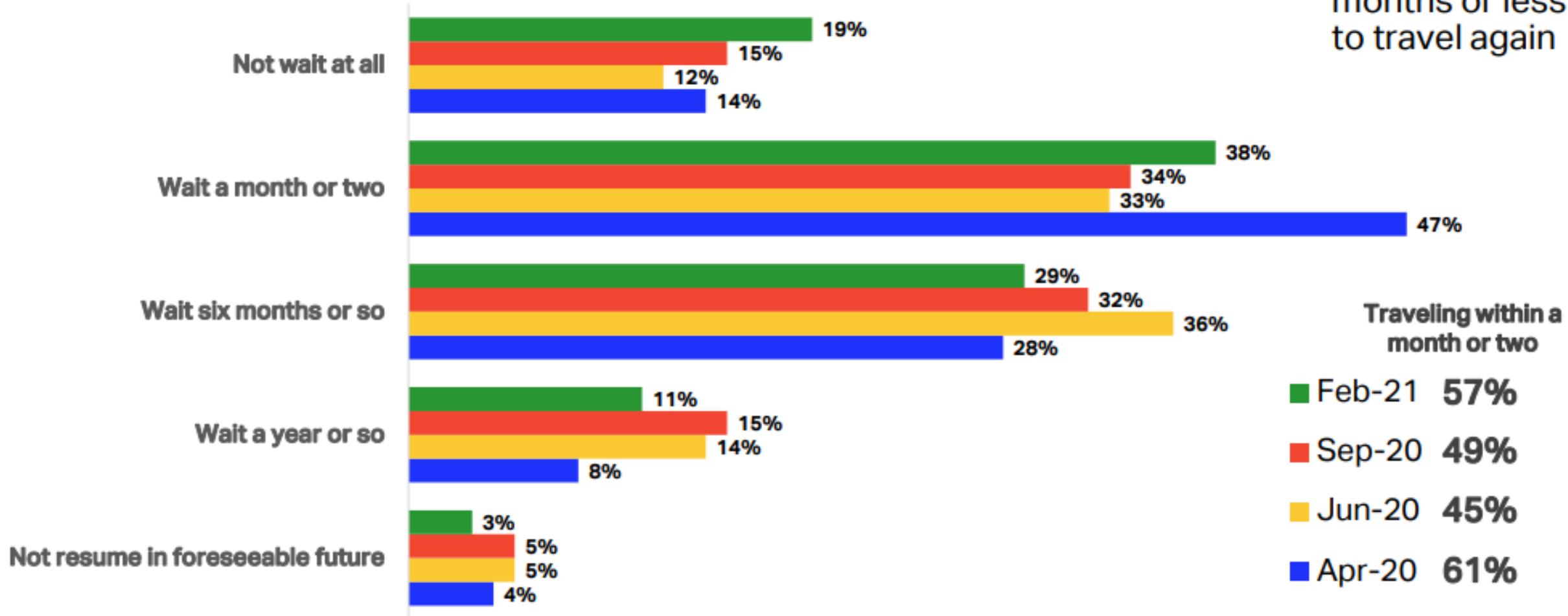
Q26. Do you agree strongly, agree somewhat, disagree somewhat or disagree strongly with each of the following statements? Q24. When it comes to the COVID-related air travel restrictions in your country, do you agree strongly, agree somewhat, disagree somewhat or disagree strongly with each of the following?

# Improving news on a return to travel....

**57%**

would wait two months or less to travel again

How Long Will People Wait to Travel Once Pandemic is Contained?



\*Numbers may not always add up due to rounding. Q12. Once the pandemic has been contained, how long would you wait, if at all, to return to your usual travel plans? \*Note that the wording of this question has changed slightly since it was asked in the April 2020 wave of this survey.

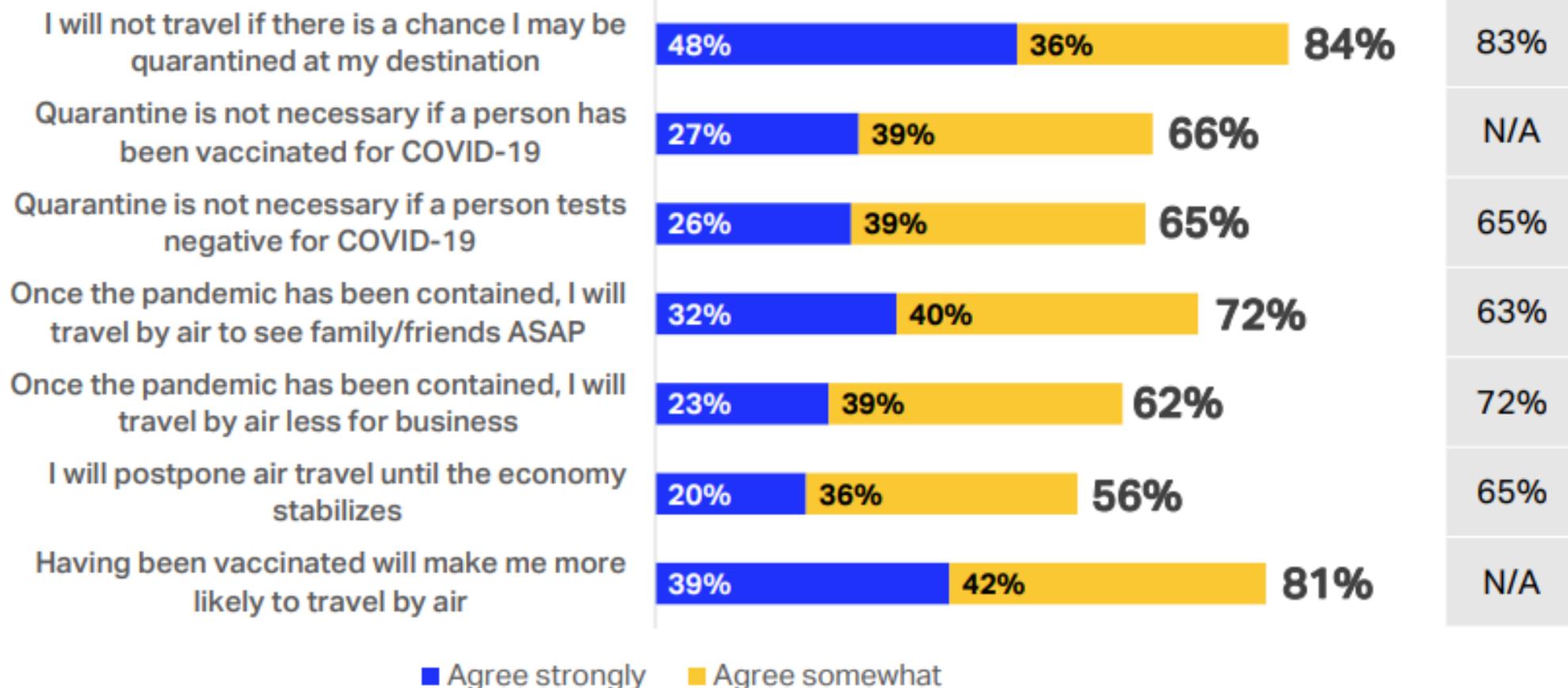


# Encouraging travel trends, but some headwinds

**84%**

of people won't travel if there is a chance of quarantine

How Long Will Wait to Travel Once Pandemic is Contained



\*Numbers may not always add up due to rounding. Q14. Do you agree strongly, agree somewhat, disagree somewhat or disagree strongly with each of the following statements? Q13. Do you agree strongly, agree somewhat, disagree somewhat or disagree strongly with each of the following statements? Q22. Do you agree strongly, agree somewhat, disagree somewhat or disagree strongly with each of the following statements?

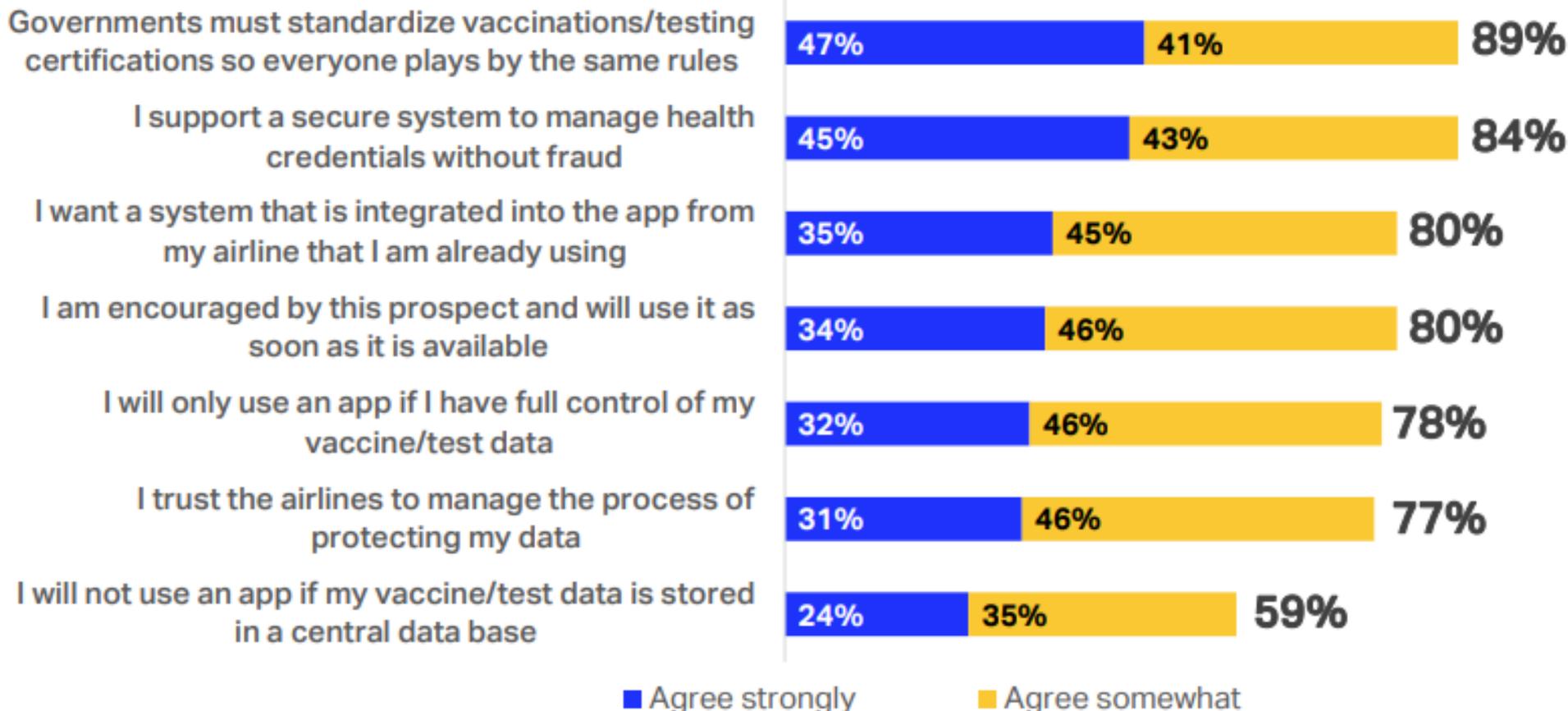


# Travel Health Credentials: travelers want an app

**4/5**

would use an app as soon as available but only if they control their own data

## Opinions About Mobile Application



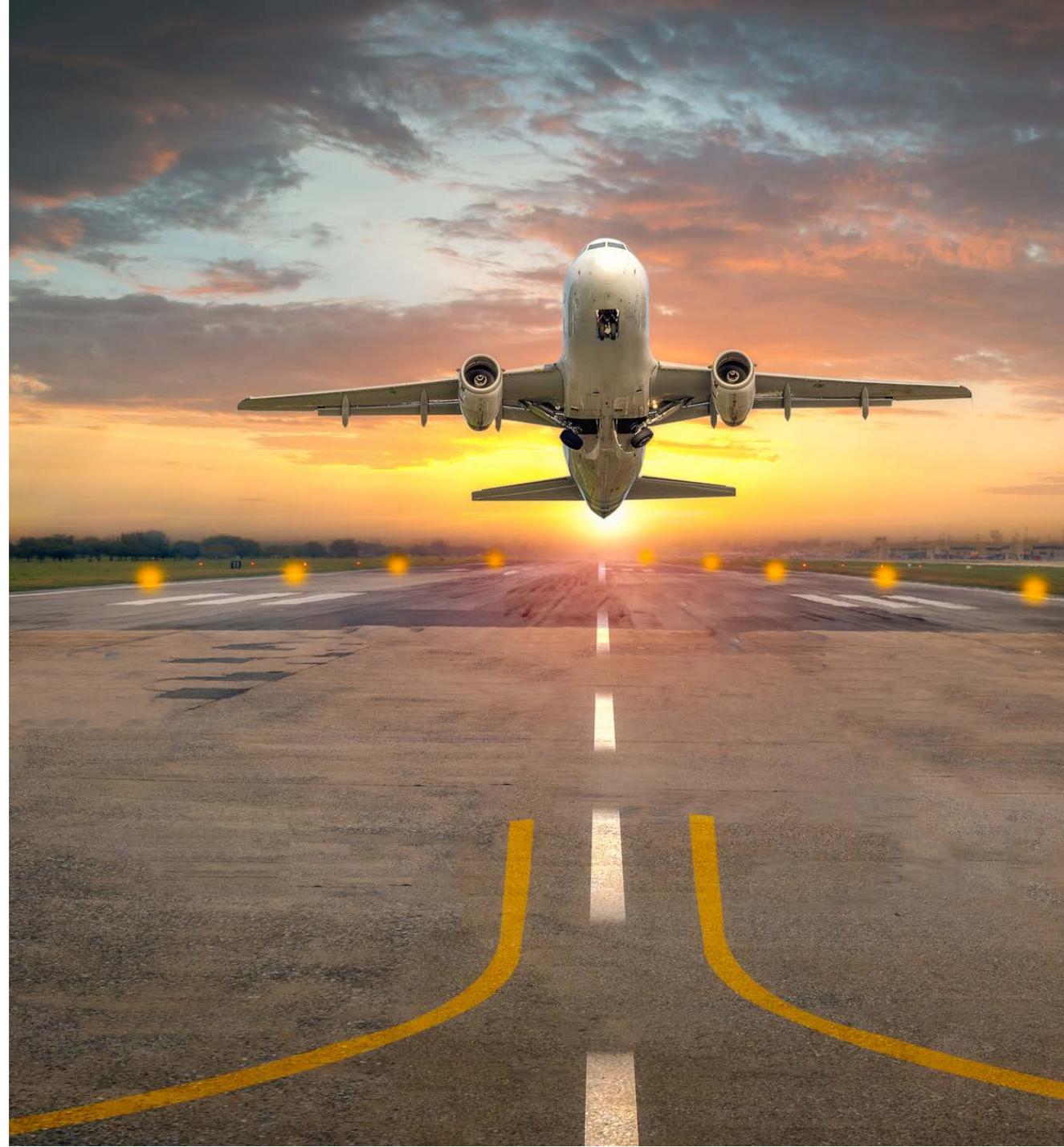
\*Numbers may not always add up due to rounding.

Q30. It appears likely that COVID-19 tests or proof of COVID-19 vaccination could be required to facilitate future travel. Many companies are developing mobile phone applications to help the airline industry and other businesses efficiently manage these potential requirements. With that in mind, do you agree strongly, agree somewhat, disagree somewhat or disagree strongly with each of the following statements?



# Planning for a Safe Restart

- Government Financial Support
- Establishing operational restart plans
- Putting tools in place to manage new COVID-19 testing and vaccine requirements



Collaboration is critical

