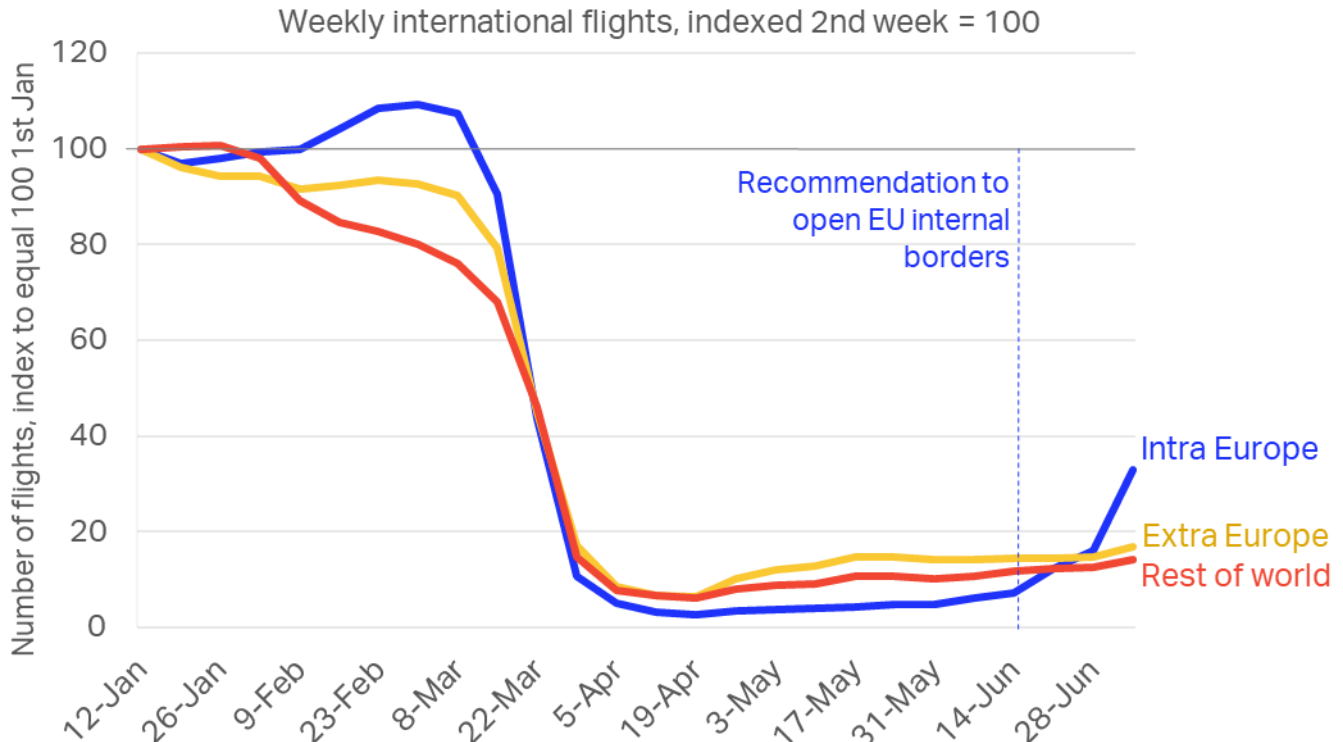




IATA Economics' Chart of the Week

10 July 2020

Intra-Europe leading the initial recovery in international flights



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- We have previously discussed the expected phased approach to industry recovery, commencing with domestic markets and followed by international markets. Today's chart focuses on developments in the latter. In particular, in recent weeks, there has been a considerable increase in the number of short-haul international flights within Europe. Despite remaining more than 60% below the level of the start of the year, since mid-June the number of intra-Europe international flights has quadrupled in two distinct stages. The initial upturn coincides with the recommendation by the [European Commission to Schengen States](#) to lift internal border controls by 15 June. In addition, the EC also recommended a partial and gradual lifting of travel restrictions to various non-EU countries after 30 June, based on a common coordinated approach.
- This pick-up in intra-Europe international flights has been supported by passengers travelling to visit friends and family as well as holiday traffic associated with the peak summer period, rather than business travel. This initial recovery has been led primarily by the region's larger point-to-point airlines, which have been able to quickly deploy capacity in response to the rise in demand as travel restrictions relaxed.
- The performance of this market sits in contrast to developments in both international flights between Europe-rest of the world and the aggregate measure of all other international flights. The factors underpinning this outcome may offer a guide for other markets. Firstly, the lift in intra-Europe international travel is consistent with travelers favoring short-haul over long-haul international travel initially, even where long-haul markets are open. But in some countries where border restrictions have been eased, quarantine requirements have been imposed. As we noted [recently](#), this has a similar impact on travel as border closures. Finally, the intra-Europe experience highlights the benefits that can come from a consistent and coordinated approach across countries which supports traveler confidence and reduces uncertainty.

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