

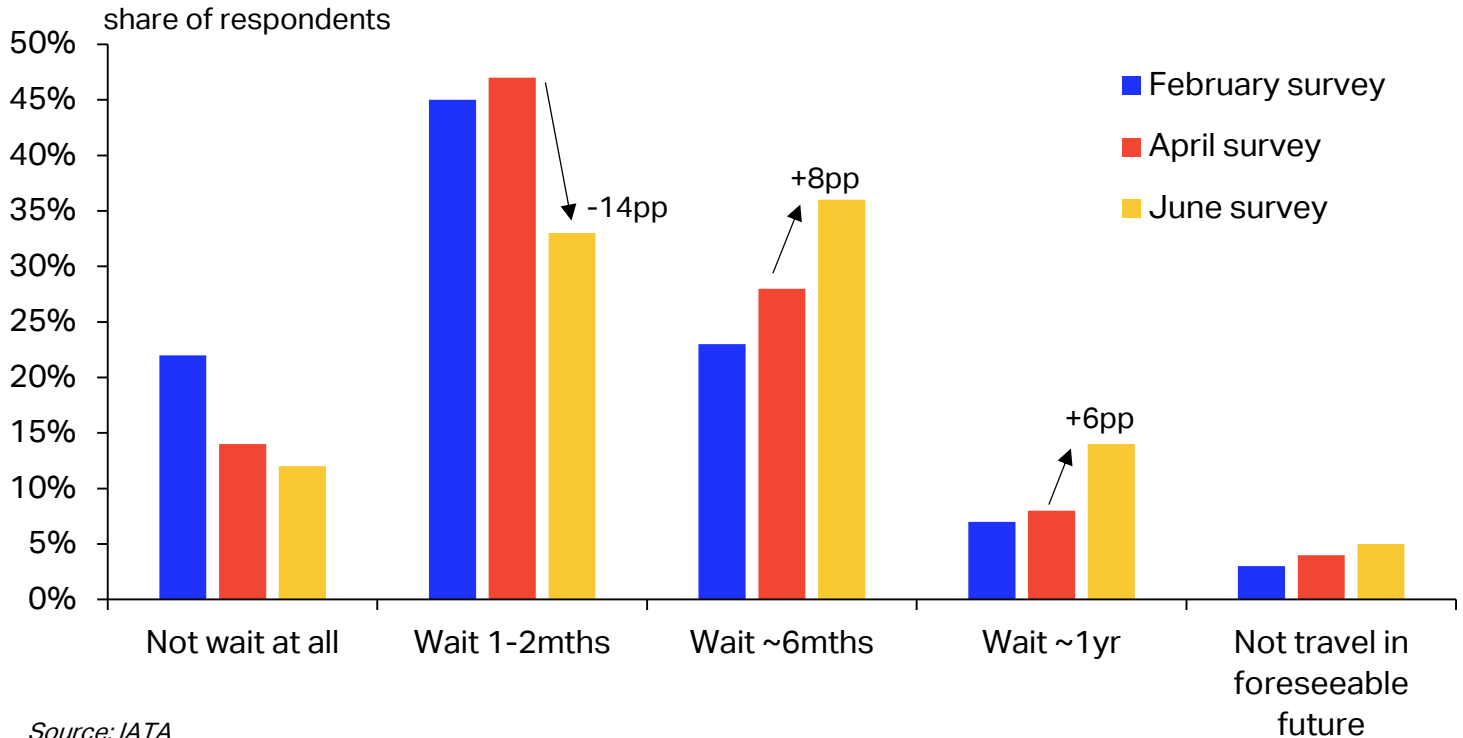


# IATA Economics' Chart of the Week

26 June 2020

## Passenger confidence is fundamental to the recovery in air travel

### Return to travel after the pandemic has subsided



Source: IATA

- As we have noted previously, the post-COVID recovery in the air transport industry has three critical elements; the containment of the health crisis, the loosening of travel restrictions and border closures and, critically, the restoration of passenger confidence to resume flying. Each of these factors will impact both the timing and the speed of the industry recovery. Today's chart presents the updated (June) findings of an IATA-commissioned survey of passengers across 11 countries to understand their views on the likely timing of a return to air travel.
- The third instalment of this survey brings some sobering developments. In April, around 60% of respondents indicated that they would be likely to return to travel within a few months of the pandemic having subsided. In June, this figure had slipped to 45%. The largest fall (of 14pp) came in the proportion of travelers expecting to travel in 1-2 months from the time the pandemic is contained; now just 33%. The largest share of people (36%) expect to fly in around six months from containment (up 8pp on this occasion), while 14% of respondents expect to wait around 12 months – around double the share from both the February and April surveys.
- Overall, these results remain consistent with our view that the industry recovery will begin in Q3 2020 but that it will be gradual in nature. Nonetheless, the survey highlights one of the important risks to our recovery profile, with more than half of travelers indicating that they will not fly until at least the end of the year if not into 2021.
- While passengers are worried about a range of factors – including being subject to quarantine measures during or following travel – among the measures that would make passengers feel safer are that airport and aircraft staff wear appropriate PPE and that airport and aircraft facilities are regularly cleaned and sanitized. Understanding and addressing the concerns of passengers – and communicating these initiatives effectively – will be vital to the restoration of consumer confidence in air travel and getting the industry back flying again. Further information on IATA's proposed layered approach to bio-safety measures can be found [here](#).

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