

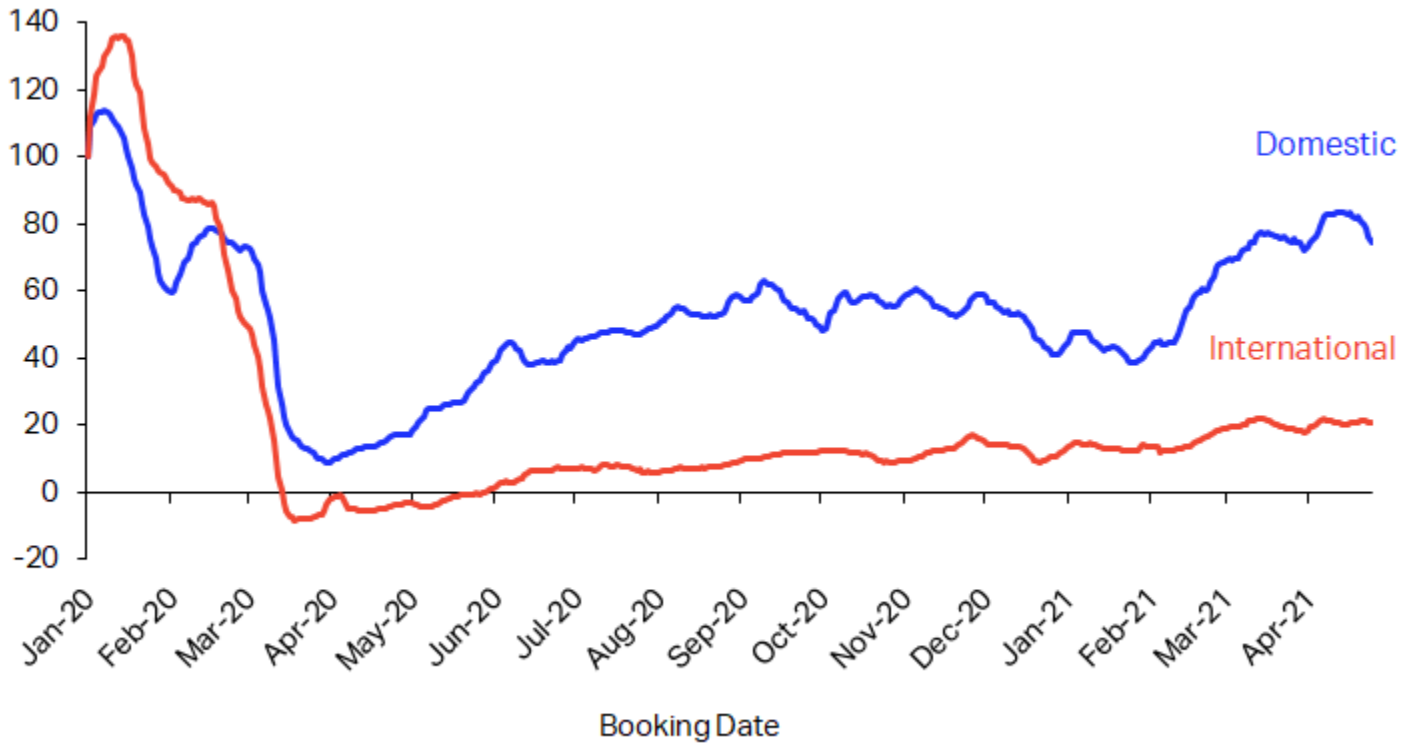


IATA Economics' Chart of the Week

07 May 2021

Domestic travel remains the driver of demand in April

Bookings, 7 days moving average
Indexed at Jan, 20=100



Source: IATA Economics using DDS

- We have recently published our [monthly analysis](#) for passenger traffic in March, which shows that the improvement in air travel in March was driven by the rebound in domestic travel. Today's chart looks at the evolution of daily bookings (7 day moving average) from January 2020 to the end of April 2021 for both domestic and international travel.
- The chart illustrates the divergence between domestic and international travel. At the end of April, daily bookings for domestic travel jumped to 74% of pre-crisis levels (January 2020). That was from 44% of pre-crisis levels at the beginning of 2021. Although there is some stabilization in domestic travel bookings in April due to tightened local restrictions in some countries, the rebound since the beginning of this year shows that there is a strong appetite for travel once the restrictions are lifted.
- On the other hand, daily bookings for international travel remain weak and stagnated at c.20% of pre-crisis levels since last summer. This is due to strict travel restrictions and uncertainties related to easing of travel restrictions in the summer period. Once roadmaps are set, we expect to see a similar jump in international bookings. As we illustrated in one of our [previous charts of the week](#), bookings from UK to Greece and Spain for the summer period more than tripled following the news that UK set out a roadmap to ease lockdown restrictions. Hence, there is clear pent-up demand for travel. Nevertheless, the coordination between governments is necessary to re-open international traffic for airlines to utilize this pent-up demand.

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