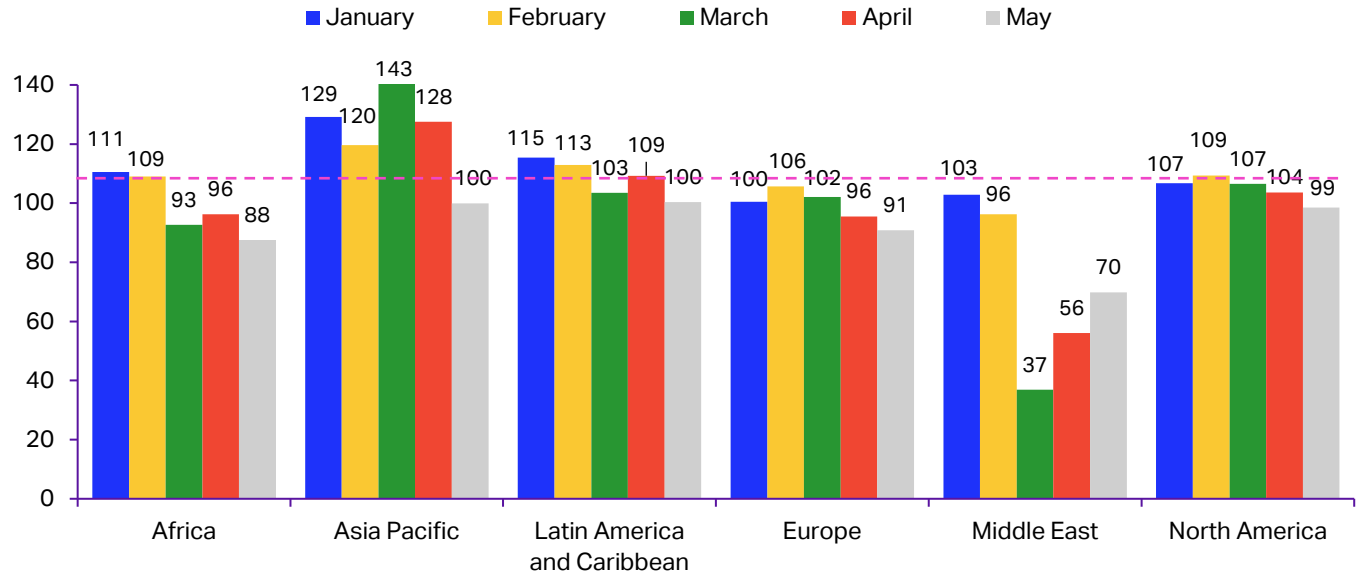
Chart of the Week

3 July 2026

Ticket Bookings Showing Mixed Signs of Demand Impact from the Middle East Disruptions

Bookings for June-Sep by purchase month and destination region, index, 2025 = 100



Source: IATA Sustainability and Economics

- Ticket bookings for the summer months between June and September 2026 suggest that air travel to the Middle East region is gradually recovering from the sharp decline of 63% recorded in March following the escalation of the Iran conflict on 28 February 2026. Although forward ticket sales in May remained 30% below May 2025 levels, bookings increased steadily between March and May, indicating a gradual resumption of connections between the Middle East and global air travel markets.
- Booking trends in other regions have been mixed. While forward bookings for summer travel to Asia Pacific, Europe, and North America remained around or above 2025 levels, growth slowed between March and May. Relative to the same month in 2025, bookings fell from an index level of 143 to 100 in Asia Pacific, from 102 to 91 in Europe, and from 107 to 99 in North America. Undoubtedly, some of the lost momentum in bookings in these three large markets is a consequence of higher fuel and ticket prices. Since late February, jet fuel prices have roughly doubled, inevitably affecting ticket prices.
- However, the evolution is also evidence of how the global air transport network responds to any local disruption. At the height of the disruptions in the Middle East, Asia Pacific expanded its bookings the most. As the Middle East is again able to satisfy more traffic, other regions are giving back some of their gains. The sharper declines in summer bookings seen in Africa and Europe in April and May, also illustrate their reliance on Middle Eastern transit hubs.
- While bookings to the Middle East remain below 2025 levels, they have recovered steadily since April. This shows the lasting appeal and importance of the region in the global air transport network. The rerouting and admirable agility of other regions, which helped compensate for the capacity lost in the Middle East because of the disruptions, is likely a temporary phenomenon and not a structural modification to the network. Barring any deterioration in the geopolitical situation in the region, we expect it will gradually recover the traffic lost.

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