# What you need to know: Airline operations: Global report September 2, 2020

As demand declines and governments around the world restrict travel, airlines are adjusting their operations, and, in some cases, suspending all services. This report summarizes what airlines around the world are doing and planning.

<u>Africa</u>	Europe	<u>Latin America</u>	
Middle East	North America	Northeast Asia	
South Asia	Southeast Asia	Southwest Pacific	

# **Africa**

## North Africa

Airline	Action and plans
EgyptAir	Operating domestic services and international flights to 32 destinations from August
Royal Air Maroc	Domestic flights resumed on June 25, with special international flights launched from July 15.
Tunisair	Maintaining limited international service to Europe and Egypt until April 4

# EgyptAir

EgyptAir operated its last international flight on March 19 as Egypt implemented a ban on international air services until March 31.1 The ban was subsequently extended until April 15.

From June 12, EgyptAir resumed limited international services, rolling out new flights to six European destinations: Amsterdam, Frankfurt, London, Munich, Paris and Vienna.<sup>2</sup> On some flights, including those to London, only Egyptian residents could book seats.

As countries gradually reopen their borders, Egyptair will operate 35 weekly departures to international destinations from August 1:3

- Africa: Addis Ababa, Dar es Salaam, Juba, Khartoum, N'Djamena (Chad), Nairobi and Tunis
- Europe: Amsterdam, Athens, Brussels, Budapest, Copenhagen, Frankfurt, Geneva, Larnaca, London, Madrid, Milan, Munich, Paris, Rome and Vienna.
- Middle East: Abu Dhabi, Baghdad, Bahrain, Beirut, Dubai, Erbiland Sharjah
- North America: New York, Toronto and Washington DC

<sup>&</sup>lt;sup>3</sup> Egypt Today, July 21, 2020





<sup>&</sup>lt;sup>1</sup> Ahram Online, March 19, 2020

<sup>&</sup>lt;sup>2</sup> Business Traveller, June 7, 2020

# Royal Air Maroc

With Morocco in a state of emergency, national airline Royal Air Maroc (RAM) suspended all domestic flights from March 21 until further notice. It had already suspended international flights from March 19.

As at June 1, all RAM flights remained suspended until further notice. <sup>5</sup> The airline resumed domestic services on June 25, initially flying from Casablanca to Laayoune, Dakhla, Oujda and Agadir. It has promised to gradually increase flight frequency and destinations. <sup>6</sup>

On July 15, RAM launched a new program of special international flights operated under certain conditions. Passengers are only eligible to fly if meeting conditions required by Moroccan authorities. They must also present a negative COVID-19 PCR test of less than 48 hours. RAM currently offers the following services from Casablanca:

- Africa Abidjan, Algiers, Dakar, Nouakchott, Tunis
- Europe Amsterdam, Barcelona, Bologna, Bordeaux, Brussels, London, Lyon, Madrid, Malaga, Marseille, Milan, Moscow, Paris, Rome
- Middle East Dubai, Istanbul, Jeddah
- North America Montreal, New York

It also operates flights to Paris from Fez, Marrakech, Oujda and Rabat

#### Tunisair

From March 14 until April 4, Tunisair cancelled all flights to Italy. 7 It also scaled back its services to a single weekly operation to Germany (Frankfurt) and the U.K. (London), while Egypt (Cairo) and Spain (Madrid) are served once every 15 days. Tunisair is maintaining three weekly flights to France (Paris).

On June 12, with the relaxation of travel restrictions, Tunisair Express resumed flights from Tunis to Naples.8

## Sub-Sahara Africa

Airline	Action and plans
Air Mauritius	All flights suspended and airline in voluntary administration
Comair	All British Airways and Kulula servicessuspendeduntil November. Airline in business rescue
Ethiopian Airlines	Steadily restartinginternational; routes, with 45 destinations served by August 1
Kenya Airways	International services resumed from August 1
RwandAir	Resuming operationsin August
South African Airways	International flights halteduntil the endof July

<sup>&</sup>lt;sup>8</sup> Arab Air Carrier's Organization, June 15, 2020





<sup>&</sup>lt;sup>4</sup> Reuters, March 21, 2020

<sup>&</sup>lt;sup>5</sup> Royal Air Maroc, June 1, 2020

<sup>&</sup>lt;sup>6</sup> Royal Air Maroc, June 24, 2020

<sup>&</sup>lt;sup>7</sup> Tunisair, March 13, 2020

## **Research and Intelligence**

#### Air Mauritius in administration

Already financially-troubled before the onset of COVID-19, the decision to suspend all flights from the start of April proved to be too much for Air Mauritius. The airline entered voluntary administration on April 22. With demand not expected to return until late 2020, Air Mauritius concluded that it would be unable to meet its financial obligations for the foreseeable future.

#### Comair

South African carrier Comair suspended all British Airways franchise flights and Kulula low-cost services from March 26. It initially planned to resume services on April 19,9 but then pushed back the resumption of services until May 3.

At the end of April, Comair announced to shareholders that it did not now expect to restart flights until October or November. <sup>10</sup> As a result of an extended period without revenue, Comair entered business rescue on May 5 to give it time to restructure its business.

As it needs a substantial cash injection, Comair does not now expect to resume operations before November, even though South African authorities allowed domestic services to restart in June.

# **Ethiopian Airlines**

Ethiopian Airlines suspended many of its international routes, continuing service to just 11 destinations. It started to rebuild its international network during June, and by August 1, it will be operating flights to the following destinations:<sup>11</sup>

- Africa Abidjan(3), Cairo(7), Cotonou (2), Dakar (3), Dar Es Salaam (7), Djibouti (4), Douala (3), Harare (5),
   Hargeisa (7), Juba (4), Khartoum (3), Kilimanjaro(5), Libreville (2), Lusaka (5), Malabo(1), Ndola (1),
   Niamey (3), Yaounde (3), Zanzibar (5)
- Americas Chicago (3), Newark(3), Sao Paulo (5), Toronto(3), Washington DC (7)
- Asia Jakarta (3), Hong Kong (4), Manila (1), Seoul (2), Shanghai (1), Tokyo Narita (2)
- Europe Athens (1), Brussels (7), Frankfurt (7), Geneva (2), London (7), Marseille (2), Milan (5), Paris (7), Rome (5), Vienna (4)
- Middle East Beirut (7), Doha (3), Dubai (4), Istanbul (3), Tel Aviv (3)

## Kenya Airways

Following a government directive banning all international passenger traffic for 30 days, from midnight on March 25, Kenya Airlines temporarily ended all international services until further notice. <sup>12</sup> The airline had previously reduced its network by 70% in response to falling demand.

Between July 6 and July 10, Kenya Airways had planned to resume service on almost all of its network, however, all international services remain suspended until August 1, with the exception of Malindi which was suspended until further notice. <sup>13</sup> Kenya Airways resumed domestic operations on July 15, flying daily from Nairobi to Kisumu and twice daily to Mombasa.

<sup>&</sup>lt;sup>13</sup> Kenya Airways



<sup>&</sup>lt;sup>9</sup> Comair, March 24, 2020

<sup>&</sup>lt;sup>10</sup> <u>Cirium</u>, April 30, 2020

<sup>&</sup>lt;sup>11</sup> Ethiopian Airlines, July 24, 2020

<sup>&</sup>lt;sup>12</sup> Kenya Airways, March 22, 2020

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Kenya Airways resumed international operations on August 1, initially flying from Nairobi to Addis Ababa, Dubai, Kigali, London and Lusaka. During the month, the airline also resumed services to Accra, Dzaoudzi (Mayotte), Freetown, Harare, Kilimanjaro, Lagos, Monrovia, Moroni (Comoros), Nampula (Mozambique) and Zanzibar. Demand will determine the resumption of service to other destinations. Kenya Airways plans to restart flights to China, Thailand and the U.S. from October 2020.<sup>14</sup>

All Kenya Airways passengers must reconfirm their booking at least 72 hours before domestic departure and seven days before international departure.

#### RwandAir

Following instructions from the country's ministry of health, RwandAir began a 30-day complete grounding from March 20.<sup>15</sup> On June 17, with Rwanda's borders remaining closed to commercial flights, RwandAir extended its grounding until restrictions are lifted.

The airline plans to resume commercial passenger services on August 1.<sup>16</sup> Flights will start on select African routes, where travel restrictions have been eased and borders have reopened. Rwandair will also resume long-haul operations with a thrice-weekly service to Dubai. It will add more countries to its network as countries lift restrictions.

# South African Airways

On March 20, South African Airways (SAA) immediately cancelled all international services until the end of May.<sup>17</sup> It ended long-haul services to New York JFK, Washington DC, London, Frankfurt, Munich, Perth and Sao Paulo. SAA also suspended regional services to Accra (Ghana), Lusaka and Livingstone (Zambia), Harare and Victoria Falls (Zimbabwe), Windhoek (Namibia), Lagos (Nigeria), Entebbe (Uganda), Blantyre and Lilongwe (Malawi), Nairobi (Kenya), Kinshasa (DR Congo), Dar Es Salaam (Tanzania) and Maputo (Mozambique).

SAA has since advised customers of an extension to the grounding of its domestic services until June 30, and its international and regional services until July 31.18

<sup>&</sup>lt;sup>18</sup> SAA



<sup>&</sup>lt;sup>14</sup> Kenya Airways, August 1, 2020

<sup>&</sup>lt;sup>15</sup> Breaking Travel News, March 20, 2020

<sup>&</sup>lt;sup>16</sup> Breaking Travel News, July 23

<sup>&</sup>lt;sup>17</sup> SAA, March 20, 2020

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# Major airline groups

Airline	Action and plans
Air France-KLM	Restoring services, with 40% of normal capacity across 80% of its pre-COVID-19 network operating by August
British Airways	Gatwick operationsgrounded; London City resuming during July. Parent IAG resumed 50% of capacity in July
Iberia	Gradually growing Madrid schedule
KLM	Daily flights to eight European destinations resumed on May 4. By August, plans to operate 95% of European network and 80% of intercontinental destinations
Lufthansa Group	Capacity across member airlines cut by 95% until May 31. Ramping up domestic and international schedule during June. Service restored to 90% of short-haul and 70% of long-haul destinations by September.

#### Air France

From March 16, Air France and KLM began implementing capacity cuts of between 70% and 90%, which the two airlines scheduled to last for two months. Air France scaled back its scheduled operations, offering flights from Paris at reduced frequencies to the following destinations:<sup>19</sup>

- Domestic Marseille, Nice, Toulouse
- Overseas Départements Cayenne, Fort-de-France, Pointe-à-Pitre, Saint-Denis de la Réunion
- Europe Amsterdam, Athens, Barcelona, Berlin, Dublin, Edinburgh, Frankfurt, Geneva, Lisbon, London, Madrid, Munich, Stockholm, Zurich
- Africa Abidjan, Cotonou, Dakar
- Asia Tokyo
- North America Los Angeles, Mexico City, Montreal, New York
- South America Rio de Janeiro, São Paulo

During June, Air France will operate 20% of its normal schedule and will gradually ramp up its flying program. By August, it aims to be operating 40% of its normal capacity across 80% of its network. The airline is prioritizing its domestic network, before resuming a large part of its long-haul services.

In July and August, Air France will resume domestic flights from Paris to 18 destinations. It will restart 10 routes to French overseas territories, including Reunion and French Polynesia, as well as to Caribbean destinations, such as Cuba and Santo Domingo.

Air France flights will also return to more than 60 European cities during July and August. It will also restart flights to three Middle Eastern destinations, including Dubai, six in Africa, five in North America, five in Central and South America, and nine cities in Asia, including Bangkok, Delhi, Singapore and Tokyo

<sup>&</sup>lt;sup>19</sup> Air France, April 30, 2020



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# **British Airways**

Since the start of the pandemic, British Airways (BA) has worked with the U.K. government's Foreign & Commonwealth Office (FCO) to continue flying where travel restrictions allow. <sup>20</sup>

With the closure of London City Airport from March 26, BA's remaining services from the facility were grounded.<sup>21</sup> Its subsidiary BA CityFlyer had been the airport's largest operator, operating 25 routes and accounting for 53% of all departures.

From the end of March, British Airways also suspended all remaining scheduled flights from London Gatwick airport, from where it had previously flown to 75 destinations. It continued to operate a limited schedule from London Heathrow.<sup>22</sup>

With the re-opening of London City on June 21, BA Cityflyer resumed flights from the airport with a Loganair-operated service to the Isle of Man.<sup>23</sup> BA Cityflyer-operated flights resumed on July 10, with services to Ibiza (Daily), Florence, Palma de Mallorca and Malaga (all three per week). From July 20, flights will resume to Dublin, Edinburgh and Glasgow. On August 1, BA will add flights to Bergerac, Faro, Mahon and Nice.<sup>24</sup>

During July, British Airways resumed mainline services to more destinations across its network, albeit with lower than pre-COVID-19 frequencies due to reduced demand and travel restrictions.<sup>25</sup>

- Domestic flights to resume from London to Belfast, Inverness, Jersey, Manchester, Newcastle and Newquay, while frequency on existing services to Edinburgh and Glasgow will increase.
- Short-haul services to resume to destinations in Austria, Bulgaria, the Czech Republic, Croatia, Denmark, France, Germany, Greece, Hungary, Iceland, Ireland, Italy, Kosovo, Morocco, Norway, Portugal, Spain, Sweden, Switzerland and Turkey.
- Long-haul existing North American destinations Boston, Chicago, Los Angeles, New York JFK, San Francisco (restarted June) and Washington DC will be joined by Bermuda, Dallas, Miami, Seattle and Toronto. In the Caribbean, BA will return to Barbados and Kingston. Resumed service to Tokyo Haneda will join existing Asian destinations Hong Kong and Singapore.

Throughout August, BA is resuming service to more destinations, albeit with low frequencies. <sup>26</sup>

- Short-haul Bari, Bastia, Bodrum, Bordeaux, Catania, Figari, Frankfurt, Genoa, Kefalonia, Lyon, Luxembourg, Malta, Paphos and Pula
- Long-haul Antigua, Islamabad and Nairobi

### **IAG**

IAG, the parent company of British Airways, Iberia, Aer Lingus, Level and Vueling, initially planned to cut capacity by at least 75% during April and May.<sup>27</sup> IAG chairman Willie Walsh believed underlying demand would probably justify a less significant reduction in capacity, but government travel restrictions mean the cuts must be this severe. It is grounding surplus aircraft and is considering accelerating older aircraft

<sup>&</sup>lt;sup>27</sup> IAG, March 16, 2020



<sup>&</sup>lt;sup>20</sup> British Airways, March 25, 2020

<sup>&</sup>lt;sup>21</sup> International Flight Network, March 26, 2020

<sup>&</sup>lt;sup>22</sup> The Guardian, March 31, 2020

<sup>&</sup>lt;sup>23</sup> Simple Flying, June 22, 2020

<sup>&</sup>lt;sup>24</sup> Breaking Travel News, July 10, 2020

<sup>&</sup>lt;sup>25</sup> Breaking Travel News, July 3, 2020

<sup>&</sup>lt;sup>26</sup> BA, August 3, 2020

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retirements, including Boeing 747-400s and Airbus A340-600s. Both aircraft sub-fleets have been fully depreciated.

With British Airways (BA) scaling back its operations, IAG raised its capacity cuts for April and May from 75% to 90%. From April 8, these cuts included BA's services to from London to Japan. The airline suspended until the end of April double-daily services to Tokyo Haneda and four-times-weekly services to Osaka, after the Japanese government banned U.K. and most European passport holders from entering the country.

IAG is planning a "meaningful" return to service in July, with passenger capacity at 50% of 2019 levels. This plan remains highly uncertain and depends on the easing of lockdowns and travel restrictions.

#### Iberia

By the start of August, Iberia Group airlines were offering regular scheduled flights to 55 destinations across Spain and Europe, with Berlin and Prague among its recently reinstated destinations. <sup>28</sup> The airline also resumed long-haul flights in July from Madrid to Costa Rica, Ecuador, the U.S. and Uruguay. During August it will operate 27% of its pre-COVID-19 schedule, up from 18% in July.

## **KLM**

From March 29 until May 3, KLM had planned to fly to 25 intercontinental and 32 European destinations, although at much reduced frequencies. It expected to operate around 10% of the normal number of flights during this period.

As travel restrictions evolved, KLM continued to scale down its European network. By May 3, KLM was also operating passenger flights to just 13 intercontinental destinations:<sup>29</sup>

- Asia: Bangkok, Osaka, Seoul, Singapore, Tokyo Narita
- Latin America: Curaçaoand São Paulo
- Americas: Atlanta, Chicago, Los Angeles, Mexico City, New York JFK, Toronto

From May 4, KLM resumed regional jet-operated daily services from Amsterdam to eight European destinations: Barcelona, Budapest, Helsinki, Madrid, Milan, Prague, Rome and Warsaw. <sup>30</sup> The airline plans to gradually reopen more routes, subject to measures being taken by authorities at the destinations, to eventually rebuild its schedule to 15% of its pre-COVID-19 level.

In July, KLM plans to operate 80% of its European network and 75% of its intercontinental destinations, albeit with fewer flights than pre-COVID-19. By August, these figures will have increased to 95% and 80% respectively.

The airline has made the wearing of face masks compulsory during boarding and on all flights across its entire network from May 11 until at least August 31, 2020. Passengers are responsible for providing their own face masks.

<sup>30</sup> KLM, May 4, 2020



<sup>&</sup>lt;sup>28</sup> Breaking Travel News, August 7, 2020

<sup>&</sup>lt;sup>29</sup> KLM, April 28, 2020

# Lufthansa Group

On March 19, Lufthansa Group announced a 95% reduction in capacity across member airlines. Air Dolomiti, Austrian Airlines and Brussels Airlines all entirely suspended their operations.

Lufthansa discontinued long-haul flying from Munich, while maintaining limited long-haul services from Frankfurt. Its basic long-haul service until May 3 comprised: three weekly services to Newark, Chicago, Montreal, Sao Paulo, Bangkok and Tokyo.<sup>31</sup> It also continued to offer approximately 50 daily connections from its Frankfurt and Munich hubs to key cities in Germany and Europe.

While Lufthansa extended its reduced schedule by two weeks to May 31, it restoredservice to more destinations. From May 18, Lufthansa doubled domestic flights from Munich. It also added Athens, Gothenburg and Porto to the list of international destinations served from Frankfurt.

Lufthansa ramped up its schedule during June.<sup>32</sup> Together with Eurowings and SWISS, Lufthansa aimed to operate 1,800 weekly frequencies to 106 German and European destinations and over 20 long-haul destinations. In the first half of June Lufthansa resumedservice to 19 short haul destinations:

- Frankfurt: Hannover, Mallorca, Sofia, Prague, Billund, Nice, Manchester, Budapest, Dublin, Riga, Krakow, Bucharest and Kiev
- Munich: Münster/Osnabrück, Sylt, Rostock, Vienna, Zurich, Brussels and Mallorca

More long-haul routes will join existing flights to Bangkok, Chicago, Newark, Sao Paulo and Tokyo:

- Frankfurt: Abuja, Bahrain, Dubai, Johannesburg, Mexico City, Mumbai, Port Harcourt, Riyadh, Tel Aviv, Toronto
- Munich: Chicago, Los Angeles, Tel Aviv

On July 27, Lufthansa resumed flights from Frankfurt to New York JFK after a four-month break. Initially operated five-times weekly, Lufthansa will ramp the service up to daily by the end of August until the end of the summer schedule (October 24). The airline has started offering on-site COVID-19 testing at Frankfurt airport for arrivals from at-risk countries like the U.S.

By September, Lufthansa plans to offer 90% of its originally planned short- and medium-haul destinations and 70% of its long-haul destinations.<sup>33</sup> It will operate 1,800 weekly short- and medium-haul connections. Lufthansa will serve 102 destinations and 88 from Munich. It will also fly 100 times a week to destinations in North America, 90 per week to Asia, more than 20 to the Middle East, and more than 25 to Africa.

<sup>33</sup> Lufthansa, June 4, 2020



<sup>&</sup>lt;sup>31</sup> Breaking Travel News, April 3, 2020

<sup>32</sup> Lufthansa, May 14, 2020

# Medium airlines

Airline	Action and plans
Aegean Airlines	Rebuilding domestic services from May 18 and international from May 31
Aer Lingus	Recommencing European flights in July
Aeroflot	Most international services suspendeduntil April 23 or 30
Air Europa	Resumed servingmany routes to Europe and the Americasduring July and August
Air Malta	Resumed services from July 1
Air Serbia	Flights from Belgrade resumed in May and June, with Nis and Kraljevo operations following in June/July
Alitalia	Planning to serve 20 domestic and 32 international destinations during August
Austrian Airlines	Mainly short-haul services resumed from June 15. Four long-haul routes restored from July 1. From mid-July, 14 routes re-suspended
AZAL	Airline groundeduntil May 31
Brussels Airlines	Resuming reducedschedule from June 15, with 59 routes operated by August
Finnair	Restarted Europeanand Asian flights from July 1. Scaled back capacity plans for September from 50% to 30% of 2019 level
Icelandair	During June and July, expanding current network of ten short-haul and a single long-haul route
LOT Polish Airlines	Restarting European and some long-haul flights in July
SAS	Resuming internationalroutes from June
Swiss	Operating minimized schedule. Resuming short- and long-haul services during June
TAP Air Portugal	Resumed limited flights from June 1, targeting 20% of normalschedule by July
Virgin Atlantic	Resuming services to three destinations from July, with more routes restored during September and October

## **Aegean Airlines**

To comply with travel restrictions imposed by its home country, the European Union and other states, Greek carrier Aegean Airlines suspended all international flights from March 26 initially until April 30, except for a small number of weekly services linking Athens with Brussels. During the suspension period Aegean continued to operate a limited service on its domestic network.

From May 18, Aegean will gradually expand domestic services, increasing capacity to Heraklion, Chania, Thessaloniki and Alexandroupolis.<sup>34</sup> From May 25, it will add flights to Rhodes, Corfu, Mytilene, Chios, Samos and other domestic destinations.

By the end of May, Aegean aims to restore international operations to some European destinations. Initial destinations served from Athens will include Star Alliance hubs Frankfurt, Munich, Zurich and Geneva, joining existing services to Brussels.

<sup>&</sup>lt;sup>34</sup> Breaking Travel News, May 15, 2020



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From June 15, Aegean Airlines restartedoperations from Thessaloniki, initially resuming flights to Munich, Frankfurt, Düsseldorf, Stuttgart, Larnaca and Tel Aviv.<sup>35</sup> During the month, Aegean also grew its domestic network to include Heraklion, Chania, Rhodes, Mytilini, Kos, Samos, Chios, Limnos and Kalamata.

During July, Aegean operated around 40% of its 2019 capacity. As it rebuilds its schedule, this will rise to 50% in August.

# Aer Lingus

Aer Lingus is operating a reduced European and North American schedule. From July 1, it recommenced some flights within Europe to destinations including Malaga, Alicante, Arecife, Faro, Palma de Mallorca and Rome.<sup>36</sup> Aer Lingus has continued to operate a reduced service to North America, maintaining flights from Dublin to New York JFK, Boston and Chicago.

#### Aeroflot

Starting March 17, Aeroflot began temporarily suspending flights from Moscow to 29 destinations.<sup>37</sup> All suspensions were in place by March 24, with most remaining until April 23. Flights to Antalya, Baku, Bucharest, Budapest, Dubai, Hanoi, Havana, Helsinki, Ho Chi Minh City, Lisbon, Los Angeles, Miami, Phuket, Tallinn, Vilnius and Washington DC are not due to resume until April 30.

Aeroflot continues to operate from Moscow to the following European destinations: Amsterdam, Berlin, Brussels, Dublin, Geneva, London, Madrid, Paris and Rome.

On August 1, Aeroflot resumed services from Moscow to both London and Istanbul after receiving clearance from the U.K. and Turkish authorities. Its low-cost carrier, Pobeda, resumed its own services from Moscow to Istanbul on the same date. From August 10, Aeroflot will expand its Turkish services with flights to Antalya.

# Air Europa

Between the end of March and June 21, Spanish airline Air Europa maintained only a single route to the mainland, flying between Palma de Mallorca and Madrid.<sup>38</sup> It also maintained limited service within the Balearic Islands, linking Palma, Ibiza and Mahon. On June 22, it restored domestic service from Palma to Alicante, Barcelona and Madrid, as well as from Madrid to Gran Canaria and Tenerife Norte in the Canary Islands.

European flights to Belgium, France, Germany, Italy, the Netherlands, Portugal, Switzerland and the U.K. resumed during July. Flights to Copenhagen will not restart until October 24.

At the end of July, Air Europa returned to Ecuador, offering a twice-weekly service from Madrid linking both Guayaquil and Quito.<sup>39</sup> Suspension of service to Peru and Uruguay should also now have ended. Flights to Argentina, Bolivia, Colombia and Paraguay remain cancelled until the end of August. Air Europa

<sup>&</sup>lt;sup>39</sup> Travel Daily News, July 27, 2020



<sup>&</sup>lt;sup>35</sup> Aegean Airlines, May 27, 2020

<sup>&</sup>lt;sup>36</sup> Aer Lingus, Flight Disruption Information

<sup>&</sup>lt;sup>37</sup> Aeroflot, March 25, 2020

<sup>&</sup>lt;sup>38</sup> Air Europa, Changes in flight operations, July 22, 2020

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was scheduled to return to Sao Paulo in mid-July, but its flights to other Brazilian destinations – Fortaleza, Recife and Salvador de Bahia remain grounded until the end of October.

In the Caribbean and Central America, Air Europa returned to Cuba and the Dominican Republic in mid-July. Services to Honduras, Mexico and Panama are due to resume during August.

Air Europa resumes flights to the U.S. from the beginning of August, operating twice-weekly services from Madrid to New York and building to twice-weekly services from Madrid to Miami.

#### Air Malta

With Malta International Airport reopening to commercial operations after a three-month closure, Air Malta resumed flights in July 1.<sup>40</sup> It's initially flying to the following destinations: Berlin, Catania, Düsseldorf, Frankfurt, Geneva, Lyon, Marseille, Munich, Prague, Rome, Vienna and Zurich. On July 15, it resumedoperations to Amsterdam, Brussels, London Heathrow, Milan, Lisbon, Madrid, Palermo and Paris Charles de Gaulle and Orly airports. Air Malta will also start a brand-new service to Madrid.

#### Air Serbia

Air Serbia initially suspended all flights from March 19 until the end of April. The airline restarted flights on May 21 offering services from Belgrade to Frankfurt, London, Vienna and Zurich. It has since launched services to Amsterdam, Banja Luka, Ljubljana, New York, Paris, Podgorica, Sarajevo, Skopje and Tivat.

On June 16, Air Serbia resumed operations from Nis, with flights to Frankfurt Hahn, Hannover, Nürnberg, Salzburg, Tivat, Vienna. Service from Kraljevo will resume on June with flights to Vienna.

#### Alitalia

From 9 March, Alitalia responded to government measures to contain COVID-19 with a reorganization of its flight schedule. From March 16, following the temporary closure of Milan Linate Airport, Alitalia's domestic flights to and from Milan have operated solely from the city's Malpensa Airport. As the Italian government also closed Malpensa's Terminal 1, Alitalia passengers must check in for flights at the airport's Terminal 2. Alitalia also suspended all international flights from Malpensa and retained Rome as the only destination served from Venice Marco Polo airport.

Alitalia started to rebuild its schedule during June, operating 36% more flights than in May. <sup>41</sup> Its schedule changes included:

- Milan Malpensa in addition to its existing schedule of eight daily flights to Rome, Alitalia resumed service to six domestic destinations: two daily flights to Bari, Catania and Palermo and four daily flights to Alghero, Cagliari and Olbia.
- Rome Fiumicino Alitalia hadalready raised frequency to Cagliari from four to six flights per day. From May 21, service to Catania and Palermoincreased from six to eight flights per day. During June, Alitalia expandedits domestic network further, adding flights to Alghero, Bologna, Bari, Genoa, Lamezia Terme, Milan, Naples, Olbia, Pisa, Turin and Venice. From June 2, it also resumedinternational services to Barcelona, Brussels, Frankfurt, Geneva, London, Madrid, Munich, Paris and Zurich.

<sup>&</sup>lt;sup>41</sup> Alitalia, May 20, 2020



<sup>&</sup>lt;sup>40</sup> Breaking Travel News, June 17, 2020

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All passenger flights are operated at half seat capacity to comply with Italian regulations on social distancing. Any further expansion of the airline's schedule will depend on demand and the relaxation of international travel restrictions.

On July 24, Alitalia will resume operations from Milan Linate airport, which has been temporarily closed. It will start with public service obligation (PSO) routes to Sardinia, but from August 1, it will transfer back some routes from Milan Malpensa.

During August, Alitalia plans to operate 1,600 flights per week on 75 routes, a 24% increase on its July schedule, and double the number of flights it operated in June. Alitalia's network will comprise 20 domestic and 32 international destinations. The airline will resume flights from Milan to New York on August 15, and from Rome to Tokyo on August 17. A number of destinations in France, Spain, the Middle East and North Africa will also rejoin its network.

### **Austrian Airlines**

At the start of March, Austrian cancelled one-fifth of its flying schedule, with further adjustments announced on March 11. As the situation deteriorated, it terminatedall regular scheduled flights until further notice from March 19. The airline then announced a series of extensions to its grounding.

Austrian Airlines resumed scheduled services to 27 mostly European cities from June 15.<sup>42</sup> By the end June it was serving a network of almost 40 destinations. Passengers must wear their own face masks onboard and will be required to social distance in the cabin where possible. The airline will not leave seats free on full flights.

From June 15, Austrian startedflying from Vienna to 25 cities: Amsterdam, Athens, Basel, Berlin, Brussels, Bucharest, Copenhagen, Dubrovnik, Düsseldorf, Frankfurt, Geneva, Hamburg, Larnaca, Munich, Paris, Pristina, Sarajevo, Skopje, Sofia, Stuttgart, Thessaloniki, Tel Aviv, Tirana, Varna and Zurich. It added nine more cities from June 22: Belgrade, Graz, Innsbruck, Kosice, Nice, Prague, Split and Warsaw.

From July 1, Austrian restored flights to 13 more destinations in Europe and the Middle East: Bologna, Cairo, Florence, Kiev, London, Milan, Moscow, Podgorica, Rome, Sibiu, Stockholm, Venice and Zagreb. Long-haul services also resumed to Bangkok, Chicago, Newark and Washington DC.

From July 16, a government ban on flights arriving from Albania, Bosnia & Herzegovina, Bulgaria, Egypt, Kosovo, Montenegro, North Macedonia, Romania and Serbia meant Austrian had to re-suspend restored services to Belgrade, Bucharest, Cairo, Podgorica, Pristina, Sarajevo, Sibiu, Skopje, Sofia, Tirana and Varna. An extension of a ban applying to flights from Sweden, the U.K. and Ukraine until July 31 also forced Austrian suspend recently-resumed services to Kiev, London and Stockholm.

From August 1, Austrian will resume services to Shanghai, initially with only a weekly service.<sup>44</sup> During September it will restart more European services to destinations including Chisinau, Dnipro, Isai, Klagenfurt, Leipzig, Lviv, Lyon, Nürnberg, Odessa and Yerevan. At the same time, it will increase frequencies on services already resumed. There will be more flights and larger aircraft to Amsterdam, Athens, Brussels, Bucharest, Copenhagen, Düsseldorf, Frankfurt and Paris.

<sup>44</sup> Breaking Travel News, July 9, 2020



<sup>&</sup>lt;sup>42</sup> Austrian Airlines

<sup>&</sup>lt;sup>43</sup> Breaking Travel News, July 15, 2020

## **Research and Intelligence**

#### **AZAL**

AZAL (Azerbaijan Airlines) and low-cost subsidiary Buta Airways initially responded to COVID-19 with a program of intense cleaning and disinfection of aircraft and passenger screening. By March 26, AZAL had scaled back its international operation to flights from Baku to London Heathrow and Moscow. 45

Other than operating repatriation flights, AZAL has been grounded since April 5. The resumption of domestic and international flights will depend on when destination countries reopen their borders to travel. <sup>46</sup> Azerbaijan is currently under a lockdown due to last until May 31. <sup>47</sup>

#### **Brussels Airlines**

Brussels Airlines shut down all services on March 21. It resumed a reduced schedule on June 15 and will build up operations in a phased approach according to market demand and travel restrictions. <sup>48</sup> From June 15, the airline launched 20 routes, with a further 40 to be added by August:<sup>49</sup>

- June 15: Alicante, Athens, Barcelona, Berlin, Budapest, Catania, Copenhagen, Faro, Lisbon, Madrid, Malaga, Marseille, Naples, Nice, Porto, Prague, Rome, Tel Aviv, Venice, Vienna
- June 22: Dubrovnik, Geneva, Heraklion, Hurghada, Ibiza, Kos, Las Palmas, London, Lyon, Milan, Palma de Mallorca, Paris, Rhodes, Tenerife
- July: Bilbao, Florence, Hamburg, Ljubljana, Manchester, Oslo, Palermo, Stockholm, Toulouse, Vilnius, Warsaw
- August: Abidjan, Accra, Banjul, Bujumbura, Cotonou, Dakar, Douala, Entebbe, Freetown, Kigali, Kinshasa, Lomé, Monrovia, New York, Yaoundé
- September/October: Basel, Birmingham, Bologna, Edinburgh, Gothenburg, Milan Linate, Warsaw

Because of the extension of travel restrictions outside Europe, the resumption of long-haul services planned for June and July has been delayed until August.<sup>50</sup>

### **Finnair**

Between April 1 and June 30, Finnair maintained a limited domestic schedule, operating flights from Helsinki to Oulu, Rovaniemi, Kuopio and Mariehamn.<sup>51</sup> It also continued European services to Amsterdam, Berlin, Brussels, Frankfurt, London, Munich, Paris, Stockholm, Tallinn and Zurich. It suspended flights to all other European and long-haul destinations.

During July, Finnair planned to operate 30% of its normal schedule, adding back frequencies and routes. In Europe, it focused on key cities, reconvening services on July 1 to Budapest, Copenhagen, Dublin, Düsseldorf, Edinburgh, Gothenburg, Geneva, Hamburg, Malaga, Manchester, Oslo, Prague, Riga, St Petersburg, Vilnius and Vienna.<sup>52</sup> It also restarteddomestic services from Helsinki to Turku and Vaasa. Flights to Ivalo and Kittila follow in August, and to Kuusamo and Tampere in September.

<sup>&</sup>lt;sup>52</sup> Finnair, May 18, 2020



<sup>&</sup>lt;sup>45</sup> <u>Azernews</u>, March 27, 2020

<sup>&</sup>lt;sup>46</sup> AZAL

<sup>&</sup>lt;sup>47</sup> Reuters, May 1, 2020

<sup>&</sup>lt;sup>48</sup> Brussels Airlines, May 14, 2020

<sup>&</sup>lt;sup>49</sup> Brussels Airlines, May 25, 2020

<sup>&</sup>lt;sup>50</sup> Brussels Airlines, June 29, 2020

<sup>&</sup>lt;sup>51</sup> Finnair

#### **Research and Intelligence**

Long-haul services also resumed in July to key Asian destinations Bangkok, Beijing, Nagoya, Osaka, Seoul, Singapore and Tokyo. Subject to government approval, Finnair also intends to restore service to Hong Kong and Shanghai.

During August, Finnair restartedflights to Barcelona, Madrid, Milan, Rome and Warsaw, as well as long-haul services to Delhi and New York.

By September, Finnair had planned to be operating 50% of its pre-pandemic schedule, up from the 25% it operated in July. However, as the introduction of COVID-19-related restrictions resulted in lower-than-expected demand, particularly passengers connecting from long-haul to short-haul flights, the airline scaled back its plans for September operations. On its domestic network it will suspend services to Turku, postpone the September launch of services to Tampere, and reduce frequencies to Vaasa and Mariehamn. It will, however, increase service to Ivalo, Kittila and Kuusamo. On its European network, it will suspend service to Nice, and while maintaining all other destinations, many will see frequencies cut. As a result of these changes, capacity will be 30% of its September 2019 level, instead of the planned 50%.<sup>53</sup>

#### Icelandair

By March 23, Icelandair was operating just 14% of its flight schedule. It is currently operating flights from Reykjavik to ten European destinations (current weekly frequencies in brackets), but it will be increasing frequencies through July 19. During June and July, it will also be adding more European destinations to its network.

- Current: Amsterdam (4), Berlin (3), Copenhagen (9), Frankfurt (3), London (2), Munich (2), Oslo (4), Paris (3), Stockholm (3), Zurich (3)
- Planned: Billund (2), Brussels (3), Dublin (2), Düsseldorf (2), Glasgow (2), Hamburg (1), Helsinki (2), Madrid
   (1)

Icelandair serves a single long-haul destination, with twice-weekly flights to Boston. By mid-July, it will have increased its long-haul network to eight cities.

- Current:Boston (2)
- Planned: Chicago(4), Denver (2), Minneapolis (3), New York JFK (5), Seattle (4), Toronto (4), Washington (4)

With Iceland officially reopening its borders on June 15, Icelandair plans to revise its flight schedule from July 1. This may include new flights to destinations in Denmark, Norway, Sweden, France, Germany, the Netherlands and Switzerland.<sup>54</sup>

#### **LOT Polish Airlines**

LOT gradually restored domestic operations from June 1, offering services from Warsaw to Krakow, Gdansk, Poznan, Rzeszow Szczecin, Wroclaw and Zielona Gora, and from Krakow to Gdansk. These were followed later in the month by Krakow-Olsztyn-Mazury and Rzeszow-Gdansk.<sup>55</sup>

<sup>&</sup>lt;sup>55</sup> LOT, Resumption of flight connections



<sup>&</sup>lt;sup>53</sup> Finnair, August 12, 2020

<sup>&</sup>lt;sup>54</sup> Breaking Travel News, June 15, 2020

## **Research and Intelligence**

From the beginning of July, the airline resumed international flights for the first time since mid-March. <sup>56</sup> It initially added back flights from Warsaw to Amsterdam, Barcelona, Berlin, Brussels, Budapest, Chania, Corfu, Dubrovnik, Düsseldorf, Kiev, Oslo, Podgorica, Prague, Split, Tbilisi, Tirana, Tivat, Varna, Vienna, Vilnius and Zadar. It also restarted long-haul services to Seoul, Tokyo Narita and Toronto.

By mid-July, LOT will have also resumed services to Copenhagen, Frankfurt, Geneva, Hamburg, Ljubljana, London Heathrow, Madrid, Milan, Odessa, Paris, Riga, Tallinn, Zagreb and Zurich. The airline is also resuming flights from Budapest to Dubrovnik and Varna, and from Poznan to Podgorica.

## SAS

With demand for international air travel "essentially non-existent," SAS suspended most of its operations and temporarily reduced its workforce by 90%. From March 16, the airline virtually grounded itself. It was able to maintain its domestic network in Norway.

As countries begin to ease their travel restrictions, SAS resumedsome suspended flights in June.<sup>57</sup> From June 15, it restartedflights from Copenhagen to ten destinations and to four from Stockholm Arlanda airport. During June, SAS served the following routes:

- Copenhagen: Athens, Brussels, Düsseldorf, Faroe Islands, Frankfurt, Gdansk, Malaga, Milan, Munich, Nice, Palanga, Reykjavik, Split, Stuttgart, Trondheim, Vilnius
- Olso-Split
- Stockholm: Athens, Palma de Mallorca, Nice, Ostersund, Thessaloniki, Visby

During July, SAS resumed service on the following routes:

- Copenhagen: Chania, Manchester, Olbia, Pisa, Pula, Thessaloniki, Venice, Warsaw
- Oslo: Dublin, Düsseldorf, Edinburgh, Frankfurt, London, Manchester, Zurich
- Stockholm: Dublin, Zurich

SAS's domestic networks in Denmark, Norway and Sweden will soon be almost fully restored, as the airline resumes flights from Stavanger to Trondheim and from Stockholm to Ronneby and Sundsvall.<sup>58</sup> SAS is also increasing European flights and adding 18 routes, including Copenhagen-Paris, Stockholm-Frankfurt and Oslo-Brussels.

At the end of September, SAS plans to restart intercontinental flights to Asia with a weekly Copenhagen-Shanghai service. It will also increase Copenhagen-New York to a daily operation, while maintaining services from Copenhagen to Chicago and San Francisco. SAS will expand its transatlantic operation with the restart of Copenhagen-Washington DC service.

## **Swiss**

Following the lead of other Lufthansa Group carriers, Swiss scaled back its operations to a "minimized" schedule. It continued to fly to selected European cities and a total of just three weekly long-haul flights to Newark from Zurich and Geneva.

Swiss aimed to maintain service on a minimum number of routes for as long as possible, so that it is well placed to resume services as soon as the situation improves.

<sup>&</sup>lt;sup>58</sup> SAS, August 27, 2020



<sup>&</sup>lt;sup>56</sup> Business Travel News, July 2, 2020

<sup>&</sup>lt;sup>57</sup> <u>SAS</u>, May 27, 2020

## **Research and Intelligence**

Swiss is planning to resume services in June to the Mediterranean and major European cities, including Paris, Brussels and Moscow. The airline also plans to reintroduce long-haul services from Zurich to Bangkok, Chicago, Hong Kong, Johannesburg, Mumbai, New York JFK and Tokyo.

# **TAP Air Portugal**

As Portugal eased its lockdown, national airline TAP Air Portugal (TAP) resumedservices.<sup>59</sup> On June 4, TAP resumedservice to North America, restarting twice-weekly flights from Lisbon to Newark. In July, it added twice-weekly service to Boston, Miami and Toronto. The airline also added three new North American routes: Ponta Delgada-Boston (July 1), Ponta-Delgada-Toronto (July 2) and Lisbon-Montreal (July 30).

In July, TAP Air Portugal planned to operate 247 weekly flights – about 20% of its pre-COVID-19 schedule. It will resume domestic services and flights across Europe to 21 destinations: Brussels, Geneva, Zurich, Frankfurt, Hamburg, Berlin, London, Dublin, Paris, Nice, Lyon, Amsterdam, Madrid, Barcelona, Seville, Malaga, Luxembourg, Stockholm, Copenhagen, Milan and Rome. 60 Long-haul destinations will include Recife and Fortaleza in Brazil and six points in Africa: Dakar, Luanda, Maputo, Praia, Sao Vicente and Sao.

The airline's planned schedule for July, August and September has been outlined in the tables below: 61

#### **Domestic**

	Weekly flights scheduled		
Route	July	August	September
Lisbon-Porto	21	28	42
Lisbon-Funchal	14	35	42
Porto-Funchal	2	7	7
Lisbon Ponta Delgada	12	17	26
Porto-Ponta Delgada	2	7	7
Lisbon-Terceira	3	7	10
Lisbon-Porto Santo	2	4	4
Lisbon-Faor	14	21	21

<sup>&</sup>lt;sup>60</sup> Travel Agent Central, May 26, 2020





<sup>&</sup>lt;sup>59</sup> Business Travel News, May 28, 2020

# **Research and Intelligence**

# Africa and the Middle East

		Weekly flights scheduled	
Route	July	August	September
Lisbon-Maputo		2	2
Lisbon-Luanda		4	4
Lisbon-Dakar		7	7
Lisbon-Praia		4	7
Lisbon-São Vicente		4	2
Lisbon-Sal			3
Lisbon-Bissau			1
Lisbon-Accra/Sao Tome		2	5
Lisbon-Casablanca		10	11
Lisbon-Marrakech		11	11
Lisbon-Tel Aviv			3

# **North America**

	Weekly flights scheduled		
Route	July	August	September
Porto-New York		1	2
Lisbon-Newark	2	3	7
Lisbon-Boston	2	3	4
Lisbon-Miami	2	3	3
Lisbon-Washington DC		2	3
Lisbon-Toronto	2	3	5
Lisbon-Montreal		3	3
Ponta Delgada-Boston	2	2	3

# **South America**

		Weekly flights scheduled	
Route	July	August	September
Lisbon-Sao Paulo	4	7	7
Lisbon-Rio de Janeiro	2	3	3
Lisbon-Recife		2	3
Lisbon-Fortaleza		2	2
Lisbon-Belo Horizonte		2	2
Lisbon-Brasilia			2
Lisbon-Salvador			2
Porto-Rio de Janeiro		1	1



#### **Europe**

During July, TAP Portugal operated flights from Lisbon to 21 European destinations and two from Porto

- Lisbon: Amsterdam, Barcelona, Berlin, Brussels, Copenhagen, Dublin, Frankfurt, Geneva, Hamburg, London, Luxembourg, Lyon, Madrid, Malaga, Milan, Nice, Paris, Rome, Seville, Stockholm, Zurich
- Porto: Luxembourg, Paris

During August, the airline restartedflights from Lisbon to Düsseldorf, Florence, Gran Canaria, Manchester, Marseille, Munich, Oslo, Prague, Tenerife, Toulouse, Valencia, Venice, Vienna and Warsaw, as well as from Porto to Amsterdam, London, Milan and Zurich.

#### Virgin Atlantic

Virgin Atlantic had been planning to resume some services in July. However, it then indicated it would not restart flights until at least August due to the U.K. government's imposition of a 14-day quarantine on international arrivals from June 8.<sup>62</sup> It then reverted to its previous plan, aiming to restore some services from July 20, with more routes added in August, September and October:

- July Hong Kong, New York JFK, Los Angeles
- August Barbados, Miami, Orlando, San Francisco, Shanghai
- September Atlanta, Boston, Delhi, Lagos, Las Vegas, Mumbai, Seattle, Tel Aviv, Washington DC
- October Antigua, Montego Bay

By the start of September, Virgin was operating daily flights to New York JFK and Los Angeles. However, it had delayed the resumption of service to Atlanta, Lagos, Tel Aviv from August until September.

Subject to approval from the U.S. Centers for Disease Control and Prevention, Virgin aimed to resume Manchester-Orlando flights on August 24, with Manchester-Barbados services resuming in October.

Even before it returns to a fully operational schedule, Virgin Atlantic is planning to expand its network, announcing plans to fly in December to Pakistan for the first time. Subject to regulatory approval, it will operate from London Heathrow to Lahore and Islamabad and from Manchester to Islamabad.

<sup>&</sup>lt;sup>62</sup> Business Travel News, May 27, 2020



# Low-cost carriers

Airline	Action and plans
easyJet	Restoring 50% of networkin July and 75% in August, but at 30% of normal capacity. Resumed some flying in June
Eurowings	Rebuilding Mediterranean flights from May
Jet2	Airline shut down until July 15
Norwegian	Resuming some short-haul routes from July 1
Pobeda	All flights suspended until the end of May
Ryanair	Most of network reopenedon July 1. Operating 60% of normal schedule in August
Volotea	Entire fleet grounded
Wizz Air	Operating at 60% of 2019 capacity, but may delay plans to increase this to 80% in the final quarter of 2020

# easyJet

Because of country lockdowns, travel restrictions and changes to travel advice across its network, easyJet grounded the majority of its fleet from March 24.<sup>63</sup> The airline had planned to operate a minimal schedule of essential services on some U.K. routes, operated at a maximum of 10% of usual capacity. By March 30, easyJet had grounded all remaining aircraft in response to the implementation of national lockdowns and travel restrictions.<sup>64</sup>

On May 21, easyJet announced plans to resume flying from June 15 primarily with domestic flights within France and the U.K, where it believes there is sufficient demand to support profitable flying.<sup>65</sup> As demand increases, it will announce more routes.

EasyJet resumed flights on June 15, operating domestic and international flights from France, Italy, Portugal, Switzerland and the U.K.<sup>66</sup> Most flights operated during June will be domestic. The airline planned to restore 50% of its 1,022 routes in July, rising to 75% in August. Capacity will be limited to around 30% of its normal schedule.<sup>67</sup>

# Eurowings

Eurowings is expanding its operations from Düsseldorf, Cologne/Bonn, Hamburg and Stuttgart, gradually adding 15 destinations from May onwards. It's focusing on the Mediterranean region with flights to Spain, Greece, Portugal and Croatia.

<sup>&</sup>lt;sup>67</sup> Business Travel News Europe, June 3, 2020



<sup>&</sup>lt;sup>63</sup> easyJet, March 20, 2020

<sup>&</sup>lt;sup>64</sup> Breaking Travel News, March 30, 2020

<sup>&</sup>lt;sup>65</sup> easyJet, May 21, 2020

<sup>&</sup>lt;sup>66</sup> Breaking Travel News, June 15, 2020

## **Research and Intelligence**

#### Jet2

U.K. low-cost and leisure carrier Jet2 initially cancelled all flying until May 1. By April 7, it had extended the grounding until June 17. In June, because of ongoing travel restrictions, Jet2 further extended its grounding until July 15.68

#### Norwegian

Norwegian initially cancelled 15% of its schedule from mid-March until mid-June. By March 16, it had announced more significant cuts effective March 21. Most of its fleet was grounded.<sup>69</sup>

Norwegian expected this hibernation phase -95% of its aircraft were grounded, with just eight used to operate 13 state-supported domestic services - to continue until summer 2021. To During 2021, it would gradually ramp up its core short-haul routes and only resume its most profitable long-haul routes once there is sufficient demand.

On June 17, Norwegian announced an earlier-than-expected resumption of service scheduled for July 1, 2020.<sup>71</sup> During July, it plans to operate 76 routes across Europe from its Scandinavian hubs. New services will include Oslo-London (seven per week), Oslo-Edinburgh (two), Copenhagen-London (six) and Copenhagen-Edinburgh (two). Norwegian will also serve destinations in Greece, Spain and key European cities, as it returns 12 aircraft to service.<sup>72</sup> During July and August, Norwegian will serve 49 destinations from Oslo.

#### Pobeda

Aeroflot low-cost unit Pobeda has suspended all flights from April 1 until the end of May. The carrier has been affected by a halt to international air travel from March 27 and the temporary suspension of mass recreational events.

#### Ryanair

Ryanair grounded most flights from March 24. It did not expect to operate any regular services until June at the earliest.

On May 12, Ryanair announced plans to reinstate flights across 90% of its network from the beginning of July, operating just 40% of its normal flying schedule. Resumption was subject to the lifting of government restrictions on inter-EU services and the introduction of public health measures at airports.

During August, Ryanair plans to operate more than 60% of its normal schedule. However, the airline reduced capacity by 20% for both September and October, following a noticeable weakening in forward bookings during August following a resurgence of COVID-19 in a number of European countries. The airline is cutting frequencies rather than routes.

<sup>&</sup>lt;sup>72</sup> Norwegian, June 17, 2020



<sup>68</sup> Breaking Travel News, June 10, 2020

<sup>&</sup>lt;sup>69</sup> Norwegian, March 24, 2020

<sup>&</sup>lt;sup>70</sup> Anna.aero, April 28, 2020

<sup>71</sup> Breaking Travel News, June 17, 2020

## **Research and Intelligence**

# Volotea

Spain's fourth-largest airline Volotea has grounded its entire 33-aircraft fleet until at least April 8. This is in response to the collapse in demand and national curfews and regulations limiting air traffic, such as the virtual prohibition of passenger flights to the Balearic Islands except for repatriation purposes.

#### Wizz Air

With around 85% of its capacity suspended, Wizz Air warned in April 2020 that the grounding of its entire fleet remained a real possibility. At the time, it was only operational in Bulgaria, Hungary and Romania.

After introducing additional hygiene measures to ensure the health and safety of customers and crew, Wizz Air reopened its London Luton base from May 1.<sup>73</sup> It initially offered departures to eight points in Romania: Cluj-Napoca, Constanta, Craiova, Isai, Suceava, Targu Mures, Satu Mare and Timisoara. Customers can also fly to Budapest, Belgrade, Bratislava, Kosice, Lisbon, Tenerife and Tel Aviv.

Wizz Air began rebuilding its schedule from July, resuming service on existing routes and launching some new routes:7475

- London Luton Corfu, Faro, Heraklion, Rhodes, Zakynthos, Marrakech (October)
- Vienna Bourgas, Charleroi, Constanta, Herkalion, Rhodes, Tallinn, Zakynthos, Marrakech (October)
- Lviv Billund, Hamburg, Lisbon, Szczecin, Tallinn
- Kharkiv-Berlin, Tallinn

Since July, Wizz Air has been one of the most aggressive carriers in its resumption of services, including the opening of new bases. Between July and September, it expects to operate 60% of 2019 capacity. During the final quarter of 2020, Wizz Air had planned to lift this to 80%, but this increase now seems unlikely, as fresh travel restrictions in Europe temper demand. Wizz Air may even reduce capacity again.

# Regional carriers

Airline	Action and plans
airBaltic	Flights slowly resuming from May 18
Air Dolomiti	All services from Italy to Germany, except one daily flight, suspended
Braathens Regional	All services suspended from April 6 until May 31. Company in administration
Luxair	Gradually resuming flights to 7 destinations, with more to follow in June

#### airBaltic

With the Latvian government suspending international travel from March 17 to all but Latvian nationals and returning residents, airBaltic suspended flights from both Estonia and Latvia until April 14, subsequently delaying its relaunch until May 12.76

<sup>&</sup>lt;sup>76</sup> airBaltic, April 30, 2020



<sup>&</sup>lt;sup>73</sup> Breaking Travel News, April 27, 2020

<sup>&</sup>lt;sup>74</sup> Anna Aero, May 1, 2020

<sup>&</sup>lt;sup>75</sup> Anna Aero, May 6, 2020

## **Research and Intelligence**

AirBaltic resumedscheduled operations on May 18 from Riga to Tallinn and Vilnius, with flights from Riga to Amsterdam restarted on May 25.<sup>77</sup> It has also rescheduled the start of services to Hamburg (June 1), Vienna (June 8) and Düsseldorf (June 9), with Helsinki, Munich and Berlin also in its relaunch pipeline.

From July 1, airBaltic resumed flights from Riga to London and launched a new Vilnius-London service, with Tallinn-London services resuming on July 4.

Expecting demand to remain depressed for some time, when it resumes operations, airBaltic will do so gradually, and will only operate 50% of its original schedule until the end of October.<sup>78</sup>

#### Air Dolomiti

Lufthansa's Italian regional subsidiary Air Dolomiti has suspended almost all flights, initially until April 19. The Verona-based carrier operates feeder flights to Lufthansa's hubs at Frankfurt and Munich from a number of Italian airports, including Bari, Bologna, Florence, Milan, Pisa, Turin, Venice and Verona.

Air Dolomiti intended to operate a single daily return flight from Milan Malpensa airport to Frankfurt in order to maintain an air bridge between northern Italy and Germany.

# **Braathens Regional**

Swedish airline Braathens Regional suspended all services from April 6 until the end of May. Following the Swedish government's call for people not to travel inland, it saw domestic demand dwindle. Having previously suspended nine domestic routes, Braathens grounded its remaining ten domestic and eight international routes.

As a result of the grounding, Braathens applied to enter reorganization proceedings, under which a court-appointed administrator would determine the company's viability.

# Luxair

On March 23, Luxair suspended all flights from Luxembourg, as many of its destination markets implemented flight bans to varying degrees. Luxair had planned to restart flights on April 20, but it subsequently delayed the resumption of services until May 30.<sup>79</sup>

Luxair began the gradual resumption of flights on May 29, restarting services to Faro, Hamburg, Lisbon, Munich, Porto and Stockholm, with Berlin following on June 1.80 The airline will announce more routes on June 3.

<sup>80</sup> Luxair, May 27, 2020



<sup>&</sup>lt;sup>77</sup> Business Travel News Europe, May 22, 2020

<sup>&</sup>lt;sup>78</sup> Breaking Travel News, April 6, 2020

<sup>&</sup>lt;sup>79</sup> Cirium, April 21, 2020

# Latin America back to top

# Full-service airlines

Airline	Action and plans
Aerolineas Argentinas	Airline may be groundeduntil September 1 according to government directive
Aeromexico	Most domestic routesresumed. Rebuilding internationalschedule
Avianca	International flights suspended. Domestic services resumedon September 1, 2020
Copa Airlines	Resumed operations from August 15; planning to operate 10% of normal capacity in September
LATAM Airlines	Capacity cut by 95% in April. Graduallyrestoring flying in June and July. Most LATAM airlines have filed for chapter 11 bankruptcyprotection, but they can continue flying. LATAMArgentina closeddown
TAME	Government owner has announced airline is to be liquidated

# Aerolineas Argentinas

From March 17, Aerolineas Argentinas cancelled long-haul flights to Madrid, Rome, Miami and New York until April 10.81 Since then it has operated a series of special flights to bring home Argentine passengers stranded abroad. The airline currently has flights to the following international destinations in its schedule: Barcelona, Madrid, Miami and Montevideo

Following a Government executive order mandating a period of isolation, Aerolineas Argentinas scaled back its domestic operation from March 20 until March 31.82 It continued to provide basic connections including daily flights from Buenos Aires to Córdoba, Iguazú, Mendoza, Neuquén, Río Gallegos, Tucumán and Ushuaia, as well as three weekly flights to Trelew and four to Comodoro Rivadavia. Since the start of April, Aerolineas Argentinas has made no further announcements about its domestic operation, although the special flights section on its website suggests Buenos Aires Aeroparque-Ushuaia may now be its sole domestic operation.

On April 27, Argentina's National Civil Aviation Administration asked airlines to stop selling tickets for all domestic and international departures until September 1.83 The agency claimed the decree is aimed at preventing airlines from ticketing flights not approved by the Argentine authorities.84

#### Aeromexico

During August, Aeromexico plans to operate the following international routes from Mexico City:85

- Asia Seoul (2 per week), Tokyo (2)
- Europe Amsterdam (3), Madrid (7), Paris (4)
- Latin America and the Caribbean Lima (3), Santo Domingo (3), São Paulo (4-5)

<sup>85</sup> Aeromexico



<sup>&</sup>lt;sup>81</sup> Aerolineas Argentinas, March 11, 2020

<sup>82</sup> Aerolineas Argentinas, March 20, 2020

<sup>83</sup> Breaking Travel News, April 28, 2020

<sup>&</sup>lt;sup>84</sup> BBC, April 28, 2020

## **Research and Intelligence**

• North America – Chicago (7), Denver (2), Houston (7), Las Vegas (2), Los Angeles (14), Miami (6), Montreal (2), New York (14), Orlando (5), San Antonio (7), San Francisco (5), Toronto (2), Vancouver (2)

Latin American flights to Bogota, Buenos Aires, Guatemala City, Managua, San Jose, San Salvador, San Pedro Sula and Santiago are all suspended until the end of August. European services to Barcelona and London Heathrow are due to resume from September 1. North American services to Dallas are suspended until the end of September.

Transborder services from Guadalajara to Salt Lake City and San Francisco, from Leon to Detroit and from Queretaro to Detroit are suspended until the beginning of September. But the airline is flying from Guadalajara to Chicago (7), Los Angeles (7), Fresno (5) and Sacramento (5).

Aeromexico is also operating a reduced domestic schedule until August:

	Operating	Suspended
Mexico City	Aguascalientes, Campeche, Cancun, Chihuahua, Ciudad del Carmen, Ciudad Juarez, Ciudad Obegon, Culiacan, Durango, Guadalajara, Hermosillo, Huatulco, La Paz, Leon, Los Cabos, Los Mochis, Manzanillo, Mazatlan, Merida, Mexicali, Minatitlan, Monterrey, Nuevo Laredo, Oaxaca, Puerto Vallarta, Queretaro, Reynosa, San Luis Potosi, Tampico, Tapachula, Tijuana, Torreon, Tuxtla Gutierrez, Veracruz, Villahermosa, Zacatecas, Zihuatanejo	Acapulco, Morelia
Monterrey	Cancun, Chihuahua, Guadalajara, Hermosillo, Leon, Mexico City, Puebla, Queretaro, San Luis Potosi, Tijuana	
Guadalajara	Mexico City, Monterrey, Tijuana	

Aeromexico is increasing its operations by 20% in August, operating an extra 1,200 flights compared with July. The August schedule sees it resume international services from Mexico City to Denver, Las Vegas, Quito and San Francisco and increase frequencies on existing services to Miami, Paris and Sao Paulo. There will also be extra services on domestic flights from Mexico City to Cancun, Chihuahua, Culiacan, Durango, Los Mochis and Merida.

#### Avianca

From March 23, Colombian airline Avianca suspended its international operations, largely in response to border closures around the world.<sup>87</sup>. It planned to resume normal service from May 1.

Avianca also planned to cut its domestic operation by 84%, with demand on these flights severely impacted by the loss of international connectivity. It intended to continue flights from Bogota to state

<sup>87</sup> Avianca, March 19, 2020



<sup>&</sup>lt;sup>86</sup> Business Travel News, July 29, 2020

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capitals across the country and some regional destinations. With the Colombian government closing the country's airspace from March 25, Avianca suspended all domestic flights at least until April 12.

With little sign of the airline resuming services, Avianca warned in an SEC filing about its ability to continue as a going concern. 88 The airline was allowed to restart domestic operations from September 1, the first stage in the gradual resumption of commercial air services. 89 Avianca has already operated services from Bogota to Medellin.

# Copa Airlines

Panamanian carrier Copa Airlines initially suspended all operations from March 23 through April 21. The suspension of all international flights by the Panama Civil Aviation Authority until May 22 forced Copa to extend its grounding.

Subject to approval from the authorities in destination countries, Copa had planned to phase in 12% of its June 2019 capacity from June 1. Its plans were frustrated, however, as Panama's government extended restrictions on international flights until June 21.

Copa will resume commercial operations gradually from September 4.90 However, on August 14 it was able to relaunch services for Panamanian nationals and transit passengers from Panama City to San Jose, Costa Rica; Santo Domingo, Dominican Republic; Quite and Guayaquil in Ecuador, and a weekly flight to New York, which will be increased to twice-weekly by the end of August.91 The airline plans to work with governments across the region to expand its network. By September, it aims to operate 10% of 2019 capacity, rising to 30-40% by the end of the year.

## **LATAM**

On March 12, LATAM Airlines cut its international flights by 30% for April and May, but it planned no change to its domestic operations. By March 16, in light of the spread of COVID-19, it decided to reduce overall capacity by 70%, comprising a 90% cut to international operations and a 40% reduction in domestic services. 92 By the beginning of April, border closures and reduced demand had convinced LATAM to cut overall capacity by 95% in April. 93

LATAM continued flights to 39 destinations in Brazil, but with reduced frequencies. These flights connect to LATAM's hubs at Sao Paulo (Guarulhos and Congonhas airports), Brasilia and Fortaleza. It also maintained limited services to 13 of its 16 Chilean destinations, with flights fully suspended to Rapa Nui, Castro and Osorno.

LATAM also operatedlimited international flights from Sao Paulo to Miami and New York, and from Santiago to Sao Paulo, Miami and Los Angeles. It suspended all European flights for April.

Government restrictions forced LATAM to ground the operations of its affiliates in Argentina, Colombia, Ecuador and Peru.

<sup>93</sup> Breaking Travel News, April 3, 2020



<sup>88</sup> Finance Colombia, April 27, 2020

<sup>89</sup> Simpleflying, August 11, 2020

<sup>&</sup>lt;sup>90</sup> Copa Airlines, Where are we flying

<sup>91</sup> Business Travel News, August 17, 2020

<sup>92</sup> LATAM Airlines, Investor Relations, March 16, 2020

## **Research and Intelligence**

LATAM Airlines will gradually increase its domestic and international operations during June and July.<sup>94</sup> As it resumes operations, LATAM will offer more flexible options, lower fares and increased sanitation measures.

During June, LATAM will operate international routes from Sao Paulo to Frankfurt, London, Madrid and Miami and from Santiago to Miami and Sao Paulo. By July, it intends to grow its international network to 13 destinations. In the second half of July, LATAM will reactivate services from Sao Paulo to Lisbon and from Santiago to Madrid.<sup>95</sup>

Within Brazil, LATAM will operate 74 domestic routes, while its Chilean operation will serve 12 domestic destinations, including La Serena, Copiapo, Temuco and Easter Island.

LATAM affiliates in Ecuador and Peru aim to resume domestic services in June, with its Colombian operation is aiming for a July restart.

On May 25, LATAM Group, including affiliates in Chile, Colombia, Ecuador and Peru (but excluding those incorporated in Argentina, Brazil and Paraguay), filed for chapter 11 bankruptcy protection in the U.S., to enable it to reorganize in the wake of the pandemic. LATAM can now resize its business to the new demand environment. The airline group can continue flying during this process.

In response to the COVID-19 situation, LATAM has decided to effectively close down LATAM Argentina, announcing the end of domestic service covering 12 destinations: Bueno Buenos Aires, Iguazú, Bariloche, Salta, Tucumán, Mendoza, Córdoba, Neuquén, Comodoro Rivadavia, Río Gallegos, El Calafate and Ushuaia.

# **TAME**

At the end of May, Ecuador's government decided to close and liquidate a number of public companies, including state-owned airline TAME, which had held a 34% share of the domestic market. The timing of the airline's liquidation is not confirmed; the airline has entered an assessment phase which may last between four and six months.

<sup>96</sup> Breaking Travel News, May 26, 2020



<sup>94</sup> Breaking Travel News, May 22, 2020

<sup>&</sup>lt;sup>95</sup> NexNews, June 16, 2020

## Low-cost carriers

Airline	Action and plans
Azul	Rebuilding domestic schedule, with 20% of normal capacity scheduled for June
GOL	International services grounded and domestic schedule cut by 92% through early May. Airline is slowly rebuilding domestic operation to one quarter of normal levels in July
Interjet	Operating just five domestic routes during April. International flights suspended from March 24
SKY Airlines	All operations suspended from March 25 until April 30
Viva Aerobus	Capacity back at 60% of normal level in August
Viva Air Colombia	Resumed limited domestic operations from September 1, 2020
Volaris	May capacity cut by 88%; June by 65% and July by 50%

#### Azul

Brazilian airline Azul cut its planned capacity by 90% through April 30. From March 25, it scaled back its operation to 70 non-stop flights per day to 25 destinations. It suspended all international flights except those departing from Viracopos International Airport near Campinas, where it operated 12 weekly flights to Lisbon and three to Porto.

Azul operated just 70 daily flights in April, rising to 115 in May. It added 53 more daily flights to its June schedule, but capacity was 80% lower year-over-year. Azul is also rebuilding its network, increasing the number of domestic destinations served from 25 in April through 38 in May to 57 in June.

During August, Azul was due to operate 407 flights per day linking a network of 88 destinations.

# GOL

On March 17, Brazilian carrier GOL cut international capacity by 90-95% and domestic by 50-60%. It typically serves 18 international and 79 domestic destinations. On March 24, GOL suspended all international services and cut domestic capacity by 92%. These changes applied through early May.

GOL typically operates 800 domestic flights per day. This fell to 50 during April and 70 in May. During June, this increased to 120, rising further to 200 flights per day during July. By August, GOL expects to resume operations across 90% of its network. Depending on how the COVID-19 situation develops, the airline believes it could be operating between 600-650 and 700-750 flights a day in December.

# Interjet

Low-cost carrier Interjet suspended all international flights from March 24. For the month of April, it scaled back its domestic operation to just five routes: Mexico City-Cancun (4 daily flights); Mexico City-Guadalajara (3 daily flights); Mexico City-Monterrey (3 daily flights); Mexico City-Tijuana (twice-weekly) and Mexico City-Merida (twice-weekly). The airline has yet to reveal its schedule for May.



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#### **SKY Airline**

Chilean carrier SKY Airline suspended all operations from March 25 until April 30 due to a significant slump in demand as governments throughout South America implemented travel restrictions. <sup>97</sup>

The airline had earlier halved international capacity and reduced domestic operations in Chile to a minimum. SKY Airline decided to suspend these remaining services after the government placed Chile into lockdown, urging citizens to stay at home and barring foreigners from entering the country.

#### Viva Aerobus

Mexican low-cost carrier Viva Aerobus operated 60% of its normal capacity in August, having reactivated almost 80 routes.

#### Viva Air Colombia

From September 1, 2020, Viva Air Colombia was allowed to resume domestic services, restarting operations in Bogota, Cali, Cucuta, Medellin, Monteria and Pereira.

#### **Volaris**

Low-cost carrier Volaris initially cut capacity by 50% from the last week of March, intending to continue the cuts through April. With the Mexican government's March 31 announcement of a month-long health emergency, Volaris raised its April capacity cuts to 80%. During May it operated just 12% of normal capacity, rising to 35% in June.

As demand increases, Volaris planned to operate 50% of normal capacity in July. This would include new routes from Mexico City to Ciudad del Carmen, Torreon and Villerhermosa, with flights to Campeche and Tampico launched in October.

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# Major carriers

Airline	Action and plans
Emirates	Progressives resumption of services will see 77 citiesservedby early September
Etihad Airways	Rebuilding network to 60 scheduled destinations by mid-September
Qatar Airways	Network rebuilt to 86 destinations by mid-August
Turkish Airlines	Domestic flights resumed June 4. Limited European flights restarted mid-June. Most international destinations restored to network during July and August

#### **Emirates**

Emirates suspendedmost passenger operations from March 25.98 Increasing travel restrictions – including the March 19 suspension of all entry visas to the United Arab Emirates (U.A.E.) – forced it to curtail its operations substantially.

<sup>98</sup> Breaking Travel News, March 22, 2020



<sup>&</sup>lt;sup>97</sup> Airline Geeks, March 24, 2020

## **Research and Intelligence**

Emirates resumedpassenger service to nine destinations from May 21: Chicago, Frankfurt, London Heathrow, Madrid, Melbourne, Milan, Paris, Sydney and Toronto. Because of existing travel restrictions, the airline carried passengers outbound and cargo inbound.

The U.A.E. Federal Government's decision to lift restrictions on transit passenger services prompted Emirates to resume service to 20 more destinations in June, but only for passengers connecting over Dubai to other Emirates destinations. Flights resumed to Karachi, Lahore and Islamabad, Manila, Amsterdam, Bahrain, Brisbane, Copenhagen, Dublin, Hong Kong, Jakarta, Kuala Lumpur, Manchester, New York JFK, Perth, Seoul, Singapore, Taipei, Vienna and Zurich. The airline reminded customers to check entry and exit requirements at either end of their connecting journeys. <sup>99</sup>

During the first half of July, Emirates restarted flights to 13 more destinations: Amman, Athens, Cairo, Glasgow, Khartoum, Larnaca, Male, Osaka, Rome, Tokyoand Tunis, bringing its network to 52 destinations. In the second half of the month, it resumed service to Geneva, Los Angeles and Tehran.

During August, Emirates planned to resume service to 18 more destinations, rebuilding its network to 70 cities: Addis Ababa (Aug. 1), Baghdad (Aug. 10), Basra (Aug. 10), Boston (Aug. 15), Cebu (Aug. 20), Dar Es Salaam (Aug. 1), Guangzhou (Aug. 8), Houston (Aug. 23), Kuwait City (Aug. 5), Lisbon (Aug. 16), Nairobi (Aug. 2), Oslo (Aug. 4), Peshawar (Aug. 16), Prague (Aug. 2), Sao Paulo (Aug. 2), Seychelles (Aug. 1), Stockholm (Aug. 1) and Toronto (Aug. 16).

On September 1, Emirates will restart passenger services to Birmingham and Bangkok, followed by Conakry in Guinea and Dakar in Senegal on September 3, bringing its network to 77 destinations.

## **Etihad Airways**

Following a U.A.E. government decision to suspend all flights to, from and via Abu Dhabi, Etihad Airways stopped all services on March 26, initially for 14 days. <sup>101</sup> To minimize any disruption to passengers following further extensions of its grounding, the airline has been only permitting bookings for flexible and refundable fares for travel between June 16 and August 31. <sup>102</sup>

Reacting to an easing of travel restrictions by the U.A.E. government, Etihad restartedflights to link 20 cities in Europe, Asia and Australia via Abu Dhabi from June 10. <sup>103</sup> The airline now serves 41 destinations, many with special flights:

- Africa: Cairo, Seychelles
- Southeast Asia: Bangkok, Jakarta, Kuala Lumpur, Manila, Singapore
- Europe: Amsterdam, Athens, Barcelona, Belgrade, Brussels, Dublin, Düsseldorf, Frankfurt, Geneva, London Heathrow, Madrid, Manchester, Milan, Munich, Paris Charles de Gaulle, Rome, Zurich
- Middle East: Bahrain, Beirut, Kuwait City
- North America: Chicago, New York, Toronto, Washington DC
- Northeast Asia: Seoul, Shanghai, Tokyo
- South Asia: Colombo, Islamabad, Karachi, Lahore, Male,
- Southwest Pacific: Melbourne (outbound only), Sydney

<sup>&</sup>lt;sup>103</sup> Breaking Travel News, June 4, 2020



<sup>&</sup>lt;sup>99</sup> Gulf News, June 4, 2020

<sup>&</sup>lt;sup>100</sup> Breaking Travel News, July 16, 2020

<sup>&</sup>lt;sup>101</sup> Etihad Airways, March 23, 2020

<sup>&</sup>lt;sup>102</sup> Arabian Business, April 29, 2020

## **Research and Intelligence**

From September, by adding new destinations and converting special flights to regular services, a further 19 destinations will be added to Etihad's scheduled network.

- Africa: Casablanca, Rabat
- Europe: Baku, Moscow
- Middle East: Amman, Dammam, Istanbul, Jeddah, Muscat, Riyadh
- South Asia: Ahmedabad, Bangalore, Chennai, Delhi, Kochi, Kolkata, Kozhikode, Mumbai, Thiruvananthapuram

From August 17, the Civil Aviation Administration of China (CAAC) suspended Etihad's services until at least the end of August, after two of the airline's flights were found to be carrying passengers infected with COVID-19.<sup>104</sup>

# **Qatar Airways**

The airline currently advises that passengers from all destinations served can still travel and transit through Doha, subject to entry restrictions at their final destination. <sup>105</sup>

As at August 20, 2020, Qatar Airways was serving the following 86 destinations/airports (weekly frequency in brackets):106

- Africa: Addis Ababa (3), Dar Es Salaam (7), Djibouti (3), Kigali (3), Kilimanjaro (4), Nairobi (14), Tunis (3), Zanzibar (4)
- Americas: Boston (4), Chicago(7), Dallas Fort Worth(7), Houston(3), Los Angeles(7), Montreal (4), New York JFK (12), Philadelphia (4), Sao Paulo(7), Washington DC (7)
- Asia Pacific: Bangkok (10), Cebu (7), Clark (5), Colombo (7), Dhaka (4), Guangzhou(1), Hong Kong (7), Ho
   Chi Minh City (4), Islamabad (14), Jakarta (11), Karachi (14), Kuala Lumpur (11), Lahore(14), Male (7),
   Manila (14), Peshawar(7), Seoul (7), Singapore (7), Tokyo Narita (7)
- Europe: Amsterdam (7), Athens (7), Barcelona (10), Belgrade (4), Berlin (4), Brussels (3), Budapest (3), Copenhagen (5), Dublin (3), Edinburgh(3), Frankfurt (14), Helsinki (3), Larnaca (2), London Gatwick (7), London Heathrow (21), Madrid (7), Manchester (14), Milan Malpensa (10), Munich (7), Oslo (7), Paris (14), Prague (3), Rome (9), Stockholm (7), Vienna (5), Zagreb (3), Zurich (7)
- Middle East: Ankara (3), Antalya (2), Baghdad (7), Basra (4), Beirut (14), Bodrum (2), Erbil (7), Isfahan (2), Kuwait City (14), Istanbul (14), Istanbul Sabiha Gokcen(11), Mashhad (4), Najaf (2), Shiraz (2), Sulaymaniyah (4), Tehran (20)
- Southwest Pacific: Adelaide (2), Auckland(3), Brisbane (3), Melbourne (7), Perth (4), Sydney (7)

#### **Turkish Airlines**

From March 27, Turkish Airlines temporarily suspendedall international flights. <sup>107</sup> It continued to operate domestic flights on a limited basis to Adana, Ankara, Diyarbakir, Erzurum, Gaziantep, Istanbul, Izmir, Kayseri, Konya, Malatya, Samsun, Trabzon and Van. All other domestic services were suspended until May 1. On April 28, Turkish Airlines suspended all flights until May 28. <sup>108</sup> This suspension was then extended to June 4 for domestic services and to June 10 for international flights.

<sup>&</sup>lt;sup>108</sup> Turkish Airlines, April 28, 2020



<sup>&</sup>lt;sup>104</sup> The National, August 26, 2020

<sup>&</sup>lt;sup>105</sup> Qatar Airways, March 23, 2020

<sup>106</sup> Qatar Airways, June 30, 2020

<sup>&</sup>lt;sup>107</sup> Turkish Airlines, April 1, 2020

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On June 4, Turkish Airlines resumed domestic operations, initially offering single daily flights from Istanbul to Ankara, Antalya, Izmir and Trabzon. <sup>109</sup> By June 13, it was flying from Istanbul to 40 domestic destinations, many with a daily service. <sup>110</sup>

Turkish Airlines resumed international services in mid-June, and from the beginning of August it will be flying to most destinations on its network, albeit with reduced frequencies.<sup>111</sup>

- Africa Abidjan(4 per week), Addis Ababa (3), Bamako (3), Borg El Arab (4), Cairo (10), Dakar (4), Dar Es Salaam (3), Djibouti (3), Douala (3), Kinshasa (2), Khartoum (5), Libreville (2). Mogadishu (3), Nairobi (3), Nouakchott (4), Yaoundé (3)
- Asia Delhi (6), Dhaka (4), Hong Kong (4), Islamabad (4), Jakarta (3), Kabul (3), Karachi(3), Kuala Lumpur
   (3), Lahore (3), Manila(4), Mumbai (6), Seoul (3), Singapore (3), Tokyo(2), Ulaanbaatar (2)
- Europe Amsterdam (21), Athens (7), Baku (7), Barcelona (7), Belgrade (7), Berlin (21), Birmingham (4), Bologna (4), Brussels (10), Basel (7), Chisinau (7), Cologne (11), Copenhagen (7), Dublin (4), Düsseldorf (14), Edinburgh (3), Frankfurt (14), Geneva (7), Gothenburg (3), Hamburg (14), Hannover (10), Helsinki (4), Kharkov (4), Kiev (11), London (28), Luxembourg (3), Lyon (10), Madrid (10), Malaga (4), Malta (6), Manchester (7), Marseille (5), Milan (10), Minsk (5), Moscow (21), Munich (14), Naples (4), Nice (4), Nicosia (28), Nürnberg (5), Odessa (10), Oslo (4), Paris (28), Rome (10), Sarajevo (7), Stockholm (7), Stuttgart (11), Toulouse (4), Valencia (4), Venice (4), Vienna (10), Zurich (14)
- Middle East Abu Dhabi (3), Almaty (5), Bahrain (5), Beirut (14), Bishkek (6), Doha (7), Dubai (9), Erbil (4), Kuwait City (10), Nur-Sultan (1), Tel Aviv (10)
- North America Chicago(3), Houston(3), Los Angeles (5), Miami (4), Montreal(3), New York (7), San Francisco (4), Toronto (5), Washington DC (5)

During August, Turkish Airlines is resuming service to the following destinations:

- Africa Abuja (3), Accra (4), Algiers (7), Casablanca (4), Conakry(1), Constantine (4), Cotonou (4),
   Freetown (1), Lagos (4), Marrakech (3), N'djamena (1), Niamey (3), Oran(4), Ouagadougou (2), Tunis (7)
- Asia Taipei (2)
- Europe Bucharest (10), Budapest (2), Cluj-Napoca (2), Kazan (3), Kherson (2), Krasnodar (3), Lisbon (5), Ljubljana (3), Lviv (2), Podgorica (5), Prague (3), Pristina (5), Riga (3), Rostov-on-Don (2), Salzburg (3), Skopje (5), Sochi (3), Sofia (5), St. Petersburg (5), Tallinn (3), Vilnius (3), Warsaw (3), Zagreb (4), Zaporizhzhia (3)
- Middle East Baghdad (3), Dammam (7), Dushanbe (2), Jeddah (7), Riyadh (7), Shiraz (4), Tabriz (4),
   Tashkent (4), Tehran (14)
- North America Atlanta (3), Boston (3)

## Other airlines

Airline	Action and plans
Air Arabia Abu Dhabi	Proceeding with launchin secondquarter of 2020
Air Astana	Resumed domestic flights from May 1, with international services following in June
El Al	All flights suspended until September 30

<sup>&</sup>lt;sup>109</sup> Turkish Airlines, June 1, 2020

<sup>&</sup>lt;sup>111</sup> Turkish Airlines, June 23, 2020



<sup>&</sup>lt;sup>110</sup> Turkish Airlines, June 2, 2020

## **Research and Intelligence**

Gulf Air	Operating flights to 13 destinations
Jazeera Airways	All flights grounded indefinitely
Kuwait Airways	Flights gradually resuming from August 1
Middle East Airlines	Resuming international operations during July
Oman Air	All passenger services from Muscat suspended from March 29 until June 30
Pegasus	Resumed limited domestic and international flights during the first half of June
Royal Jordanian	Domestic flights resumedon July 23. Most international services suspended until the end of July
Saudia	All international flights suspended. Domestic flights resumed in June
Wizz Air Abu Dhabi	Before launching later in 2020, European operation starting flights to Abu Dhabi from June

#### Air Arabia Abu Dhabi

Etihad Airways and partner Air Arabia have no plans to delay the launch of new low-cost carrier Air Arabia Abu Dhabi. The airline was originally due to launch in the second quarter of 2020. 112

# Air Astana

Kazakh airline Air Astana resumedlimited domestic services from May 1, offering three frequencies per day between Almaty and capital city Nur-Sultan (formerly Astana).<sup>113</sup>

Air Astana has been gradually resuming international flights since June. On August 18, the airline plans to restart international flights from Nur-Sultan to Frankfurt. Initially flying four-times weekly, Air Astana intends to operate daily during September.

## El Al

Israeli flag carrier El Al initially suspended all remaining flights on March 26 until April 4.<sup>114</sup> The airline has since posted a succession of extensions of its grounding to May 2, May 16, June 30, July 31, August 31, and, most recently, until September 30.<sup>115</sup>

#### **Gulf Air**

Bahraini carrier Gulf Air currently operates flights to the following destinations:<sup>116</sup>

- Africa Cairo
- Asia Karachi, Islamabad, Lahore, Manila, Peshawar
- Europe Athens, Frankfurt, London, Paris
- Middle East Abu Dhabi, Dubai, Kuwait City

### **Kuwait Airways**

Having suspended all flights from March 13, Kuwait Airways resumed limited scheduled flights to certain destinations on August 1. It will gradually increase commercial operations. The airline will initially link

<sup>116</sup> Gulf Air, August 28, 2020



<sup>&</sup>lt;sup>112</sup> Breaking Travel News, April 16, 2020

<sup>&</sup>lt;sup>113</sup> Breaking Travel News, April 28, 2020

<sup>&</sup>lt;sup>114</sup> Cirium, March 26, 2020

<sup>&</sup>lt;sup>115</sup> El Al, August 25, 2020

#### **Research and Intelligence**

Kuwait with Amman, Bahrain, Baku, Beirut, Bodrum, Cairo, Chennai, Delhi, Doha, Dubai, Geneva, Istanbul, Kochi, Lahore, London, Mumbai, Munich, Sarajevo, and Trabzon. 117 Plans to resume service to Damman and Riyadh have been delayed.

# Middle East Airlines

Lebanese carrier Middle East Airlines (MEA) resumed operations during July and currently operates the following schedule to 25 destinations:

- Africa Abidjan(1 per week), Cairo(daily), Lagos (1)
- Europe Athens (3), Brussels (3), Copenhagen (2), Geneva (2), Larnaca (3), London (daily), Madrid (1), Milan (1), Paris (daily), Rome (1), Yerevan (1)
- Middle East Abu Dhabi (5), Amman (6), Baghdad (2), Basra (2), Dammam (daily), Dubai (daily), El Najaf
   (2), Istanbul (daily), Jeddah (daily), Kuwait City (daily), Riyadh(daily)

### Oman Air

As COVID-19 spread around the world, Oman Air progressively suspended services to a number of markets. From March 23, only Omani nationals could travel to the country. Oman Air suspended all remaining passenger services from Muscat from March 29. 118 Other than operating occasional special flights, the suspension remains in place until further notice. Oman Air domestic flights to and from Musandam Governorate (the northern peninsula separated from the rest of Oman by the United Arab Emirates) continue to operate as normal.

# **Pegasus**

Turkish low-cost carrier Pegasus relaunched domestic flights on June 1 with plans to serve 39 routes linking 27 destinations. <sup>119</sup> It restored international flights on June 13, resuming services to Austria, Belgium, Denmark, France, Germany, the Netherlands, Switzerland and the U.K. It will gradually increase its schedule subject to approval from the Directorate General of Civil Aviation in Turkey.

### **Royal Jordanian**

Royal Jordanian resumed services on the domestic route linking Amman and Aqaba on July 23 with three weekly flights. <sup>120</sup> The airline has suspended international services to the following destinations until the end of July:

- Europe—Amsterdam, Athens, Barcelona, Berlin, Frankfurt, Geneva, Larnaca, London, Madrid, Moscow, Munich, Paris, Rome, Vienna
- Middle East Dammam, Jeddah, Riyadh, Tel Aviv
- North America Chicago, Detroit, Montreal, New York
- Northeast Asia Hong Kong
- Southeast Asia Bangkok, Kuala Lumpur

The airline has also cancelled its services to Copenhagen until the end of August.

<sup>120</sup> Travel Daily News, July 21, 2020



<sup>117</sup> Kuwait Airways, COVID-19 Updates

<sup>&</sup>lt;sup>118</sup> Breaking Travel News, March 25, 2020

<sup>&</sup>lt;sup>119</sup> Pegasus Airlines, June 4, 2020

#### Saudia

On March 15, Saudia (Saudi Arabian Airlines) suspended all international flights for 14 days. By March 21, the airline had also suspended all domestic flights for 14 days. <sup>121</sup> On March 29, Saudia announced an extension of the suspension of all international and domestic flights until further notice.

In mid-June, Saudia resumed domestic operations, flying to 11 of Saudi Arabia's 28 airports. <sup>122</sup> It resumed flights gradually, with two local flights added daily until all routes return to normal capacity. International operations remained suspended. On July 22, Saudi Arabia's General Civil Aviation Authority (GACA) confirmed the suspension would continue.

#### Wizz Air Abu Dhabi

Wizz air's new Abu Dhabi-based airline will commence services in October 2020, initially focusing on destinations in the eastern Mediterranean and Caucasus. Its initial six destination comprise Alexandria, Athens, Kutaisi, Larnaca, Odessa and Yerevan.

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# Canada

Airline	Action and plans
Air Canada	Q2 2020 capacity cut by 50%. International destinations cut to six during April. Flights to U.S. gradually resuming from May 22. Further suspensions mean Julycapacity will be 80% lower
Air Transat	European flights resumedin July
Harbour Air	All scheduled flights suspendeduntil May 4
Porter Airlines	All operations suspended from March 20 until October 7
WestJet	Starting to rebuild domestic and international network in July and August

## Air Canada

Air Canada reduced total capacity by 50% during the second quarter of 2020. It cut April capacity by 90% year-over-year.

The airline reduced its domestic network from 62 airports to 40 through April, but it aimedto continue serving all of the country's provinces and territories.

Air Canada gradually suspended most international flights by the end of March, while maintaining a few routes to help Canadian citizens return home. These "air bridges" operated between one or more of Air Canada's Canadian hubs and London, Paris, Frankfurt, Delhi, Tokyo and Hong Kong from April 1 until at least April 30. Its international network contracted from 101 airports to just six.

By April 1, Air Canada aimedto reduce its transborder network to the U.S. from 53 airports to 13. On April 21, following an agreement between the U.S. and Canadian governments to extend border

<sup>&</sup>lt;sup>122</sup> Arabian Business, June 15, 2020



<sup>&</sup>lt;sup>121</sup> Saudia, March 20, 2020

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restrictions already in place, Air Canada announced the suspension of all flights to the U.S. between April 26 and May 22.<sup>123</sup> It then resumed U.S. service, initially with flights to six destinations: New York LaGuardia, Washington Dulles, Los Angeles, San Francisco, Boston and Chicago. Air Canada plans to resume more U.S. services from June 22, subject to regulatory changes and demand.<sup>124</sup>

During June, Air Canada will also operate international services from Toronto to Frankfurt, London, Zurich, Tokyo and Tel Aviv; from Montreal to Frankfurt, London, Paris and Brussels; and from Vancouver to London, Hong Kong, Tokyo and Seoul. By early July, Air Canada plans to add more internationals services including Montreal to Athens, Rome and Geneva; Toronto to Munich, Lisbon, Amsterdam, Rome and Athens; Calgary to Frankfurt; and, subject to government approval, Vancouver to Shanghai.

To reduce daily cash burn amid ongoing weak demand for both business and leisure travel, and to adapt to government travel restrictions, Air Canada suspended 30 domestic routes during July. As a result, its capacity for the month will be 80% lower year-over-year. Most of the affected routes are in Newfoundland and Labrador, including the suspension of two departures each from Fredericton, Gander, Wabush and Deer Lake. Elsewhere there will be route suspensions from Baie Comeau, Gaspe and Regina.

#### Air Transat

Air Transat gradually suspendedits flights to Europe, initially until the end of April.<sup>125</sup> The airline resumed transatlantic services on July 24, operating three-times weekly services from Toronto to London Gatwick. <sup>126</sup>Within days, it also resumed services from Toronto to Manchester (twice weekly) and Glasgow (weekly).

#### Harbour Air

British Columbia-based commuter airline Harbour Air ceased all scheduled flights from March 27. It does not expect to resume services until May 4. It will continue charter flying.

# **Porter Airlines**

Toronto-based regional airline Porter Airlines suspended all flights from March 20. It had originally planned to resume operations from June 1.<sup>127</sup> The airline was still grounded at the end of June, when it announced that flights would continue to be suspended until August 31 due to government travel restrictions in Canada and the U.S.

On August 4, Porter postponed its return-to-service further until October7 amid ongoing domestic travel restrictions and the closure of the Canada-U.S. border.

## WestJet

WestJet Airlines suspendedall commercial international and transborder flights (to Mexico and the U.S.) from March 23 for 30 days. 128 It also reduced its domestic flight schedule by 50% over the same period.

<sup>&</sup>lt;sup>128</sup> CTV News, March 17, 2020



<sup>&</sup>lt;sup>123</sup> Cirium, April 21, 2020

<sup>&</sup>lt;sup>124</sup> Air Canada, May 22, 2020

<sup>&</sup>lt;sup>125</sup> Breaking Travel News, March, 19, 2020

<sup>&</sup>lt;sup>126</sup> Breaking Travel News, July 23, 2020

<sup>127</sup> Toronto CTV News, March 18, 2020

## **Research and Intelligence**

WestJet's capacity was down 91% year-over-year (YoY) in June. In July and August, WestJet will increase frequencies and rebuild its operating network to 39 destinations in Canada, five in the U.S. and one in Mexico. Capacity in July will still be down 76% YoY.

From July 5, WestJet restarted transborder services to Los Angeles from Calgary and Vancouver, to Las Vegas from Calgary, Toronto and Vancouver, and from Toronto to New York LaGuardia and Orlando. It also began a weekly Toronto-Cancun service from July 11. It is also increasing domestic services to destinations including Charlottetown, Kelowna, Saskatoon, Winnipeg and Yellowknife.

WestJet's August capacity will be 11% higher than July, but it will still be down 75% YoY. Due to continued border closures and provincial travel restrictions, the airline will reduce frequency or temporarily suspend some domestic routes, including services to Halifax from Edmonton, Vancouver and Winnipeg, although it will maintain services to the city from Calgary, Ottawa and Toronto.

While WestJet will continue transborder services to Los Angeles, Las Vegas, Orlando, Atlanta and New York LaGuardia, it will lower frequency to Los Angeles and Atlanta.

From August 20, WestJet will resume transatlantic services from Calgary to Paris and London Gatwick.

Through September 4, WestJet will serve 39 domestic and nine international destinations.

### Mexico

Airline	Action and plans
Aeromexico	Most domestic routesresumed. Rebuilding internationalschedule
Interjet	Operating just five domestic routes during April. International flights suspended from March 24
Viva Aerobus	Capacity back at 60% of normal level in August
Volaris	May capacity cut by 88%; June by 65% and July by 50%

### Aeromexico

During August, Aeromexico plans to operate the following international routes from Mexico City: 129

- Asia Seoul (2 per week), Tokyo (2)
- Europe Amsterdam (3), Madrid (7), Paris (4)
- Latin America and the Caribbean Lima (3), Santo Domingo (3), São Paulo (4-5)
- North America Chicago (7), Denver (2), Houston (7), Las Vegas (2), Los Angeles (14), Miami (6), Montreal (2), New York (14), Orlando (5), San Antonio (7), San Francisco (5), Toronto (2), Vancouver (2)

Latin American flights to Bogota, Buenos Aires, Guatemala City, Managua, San Jose, San Salvador, San Pedro Sula and Santiago are all suspended until the end of August. European services to Barcelona and London Heathrow are due to resume from September 1. North American services to Dallas are suspended until the end of September.





Transborder services from Guadalajara to Salt Lake City and San Francisco, from Leon to Detroit and from Queretaro to Detroit are suspended until the beginning of September. But the airline is flying from Guadalajara to Chicago (7), Los Angeles (7), Fresno (5) and Sacramento (5).

Aeromexico is also operating a reduced domestic schedule until August:

	Operating	Suspended
Mexico City	Aguascalientes, Campeche, Cancun, Chihuahua, Ciudad del Carmen, Ciudad Juarez, Ciudad Obegon, Culiacan, Durango, Guadalajara, Hermosillo, Huatulco, La Paz, Leon, Los Cabos, Los Mochis, Manzanillo, Mazatlan, Merida, Mexicali, Minatitlan, Monterrey, Nuevo Laredo, Oaxaca, Puerto Vallarta, Queretaro, Reynosa, San Luis Potosi, Tampico, Tapachula, Tijuana, Torreon, Tuxtla Gutierrez, Veracruz, Villahermosa, Zacatecas, Zihuatanejo	Acapulco, Morelia
Monterrey	Cancun, Chihuahua, Guadalajara, Hermosillo, Leon, Mexico City, Puebla, Queretaro, San Luis Potosi, Tijuana	
Guadalajara	Mexico City, Monterrey, Tijuana	

Aeromexico is increasing its operations by 20% in August, operating an extra 1,200 flights compared with July. <sup>130</sup> The August schedule sees it resume international services from Mexico City to Denver, Las Vegas, Quito and San Francisco and increase frequencies on existing services to Miami, Paris and Sao Paulo. There will also be extra services on domestic flights from Mexico City to Cancun, Chihuahua, Culiacan, Durango, Los Mochis and Merida.

# Interjet

Low-cost carrier Interjet suspended all international flights from March 24. For the month of April, mit scaled back its domestic operation to just five routes: Mexico City-Cancun (4 daily flights); Mexico City-Guadalajara (3 daily flights); Mexico City-Monterrey (3 daily flights); Mexico City-Tijuana (twice-weekly) and Mexico City-Merida (twice-weekly). The airline has yet to reveal its schedule for May.

# Viva Aerobus

Low-cost carrier Viva Aerobus operated 60% of its normal capacity in August, having reactivated almost 80 routes.

#### **Volaris**

Low-cost carrier Volaris initially cut capacity by 50% from the last week of March, intending to continue the cuts through April. With the Mexican government's March 31 announcement of a month-long health

<sup>&</sup>lt;sup>132</sup> Business Travel News, July 16, 2020



# **Research and Intelligence**

emergency, Volaris raised its April capacity cuts to 80%. During May it operated just 12% of normal capacity, rising to 35% in June.

As demand increases, Volaris planned to operate 50% of normal capacity in July. This would include new routes from Mexico City to Ciudad del Carmen, Torreon and Villerhermosa, with flights to Campeche and Tampico launched in October.

# U.S.

Airline	Action and plans
Alaska Airlines	80% capacity cut for April-May
Allegiant	30-35% cut in capacity in April and May. Service suspended at 10 airports until June 30
American Airlines	Planning to operate 55% of domestic and 20% of international schedule in July. Transatlantic routesresuming in June, July and October
Delta Air Lines	Domestic capacitycut by 80% and international by 90% in Q2 2020. More flights to Central America and the Caribbean resuming in the secondhalf of June
Frontier Airlines	Operating 60% of 2019 capacityin July
Hawaiian Airlines	Some interislandand U.S. mainland routes maintained. International services may resume at the end of July
JetBlue	April and May capacity cut of at least 40%. Adding back flights during June
Southwest Airlines	Capacity runningbetween 30-50% below 2019 levels
Spirit Airlines	July capacity will be only 16% lower year-over-year
United Airlines	Ramping up domestic services and resuming flights to Canada and Asia in July

### Alaska Airlines

Alaska Air Group, parent company of Alaska Airlines and Horizon Air, initially reduced its April capacity by 10%, rising to 15% in May. It promised to monitor demand and reduce capacity on a rolling 15-day basis as needed. By March 26, with demand down by more than 80%, Alaska Airlines deepened its capacity reduction to 70% for both April and May. 131 By April 6, the airline amended the figure to 80% for both months. Adjustments to the June schedule will depend on demand, but the airline expects substantial capacity cuts to continue for some months.

As it restores capacity, Alaska Airlines is already planning to launch seven new routes to develop its operations at Los Angeles, as it prepared to join the oneworld alliance in 2021. <sup>132</sup> Double daily services to Los Angeles from Fresno begin on September 1. From October 1, it will start new daily services from Medford and Eugene in Oregon. These will be followed on November 20 by daily services from Tampa and Bozeman and four weekly flights from Fort Myers. In December, the airline will fly to Los Angeles from Kona and Lihue in Hawaii.

<sup>&</sup>lt;sup>132</sup> Business Travel News, July 16, 2020



<sup>131</sup> Business Travel News, March 26, 2020

# BCD Travel Research and Intelligence

# Allegiant Air

Las Vegas-based leisure carrier Allegiant Air increased capacity cuts planned for April and May from 15% to 30-35% as travel declined. Ending 2019 with \$1.4 billion in debt and \$473 million in cash, Allegiant is considered to be under more pressure than some other airlines to reduce costs. <sup>133</sup>

The U.S. Department of Transportation (DOT) will allow Allegiant to suspend service to eight airports until the end of September: Dayton, Grand Forks, Ogdensburg, Rochester, St. Cloud, Tucson, Raleigh-Durham and Moline Quad Cities. It can also suspend service at Bellingham and McAllen-Mission until the end of June.

#### **American Airlines**

American Airlines suspended 60% of its capacity in April, increasing to up to 80% in May.<sup>134</sup> The airline initially planned for domestic capacity to be 20% lower in April and 30% lower in May. It increased these figures to 60-70% for April and 70-80% for May. The FAA's decision to grant additional flexibility in slotuse policies at U.S. airports is one factor behind the sudden sharp increase in domestic capacity cuts.

As part of its domestic cuts, American suspended all flights to Kona, Lihue and Maui in Hawaii in response to a 14-day quarantine order for travelers flying to the state. The airline continued to operate one daily flight from Los Angeles to Honolulu.

American also reduced international capacity by 80-90% in both April and May. During this time, it planned to operate a single daily flight each from Dallas and Miami to London Heathrow, as well as three flights per week from Dallas Fort Worth to Tokyo. American suspended most flights from New York JFK, Miami and Dallas to cities across South America.

American may suspend more than 60% of international capacity this summer.<sup>135</sup> This includes an 80% reduction in Pacific capacity, 65% on Transatlantic services and a 48% cut to Latin America.

Previously announced new services from Philadelphia to Casablanca, Chicago to Krakow, and Seattle to Bangalore will be delayed to 2021. The launch of new winter seasonal flights from Los Angeles to Christchurch and from Dallas Fort Worth to Auckland have been put back a year to October 2021. Start dates for other routes to Asia and Europe will also be delayed.

<sup>&</sup>lt;sup>135</sup> American Airlines, April 2, 2020



<sup>&</sup>lt;sup>133</sup> Cirium, March 19, 2020

<sup>&</sup>lt;sup>134</sup> American Airlines, March 27, 2020

American Airlines announced plans for the resumption of a number of European routes:

	CLT	ORD	DFW	JFK	MIA	PHL	BOS	LAX	PHX	RDU
Amsterdam			June 4			Oct 7				
Athens		June 4								
Barcelona		July 7		Oct 25	Oct 25					
Dublin		June 4	July 7			Oct 7				
Frankfurt	Oct 25		June 4							
London	July 7	June 4	Flying	June 4	Flying	June 4	Oct 25	June 4	Oct 7	June 4
Madrid				July 7	July 7	July 7				
Manchester						Oct 25				
Milan				Oct 25	Oct 25					
Munich	July 7									
Paris				July 7	Oct 25	Oct 25				
Rome						Oct 25				
Zurich						July 7				

American planned to expand its Latin American operation, resuming services to Brazil, Chile and Peru from August 5.

By the last week of May, American was carrying on average 110,000 passengers per day – up 71% on the 32,000 it had carried per day during April. In response to this improving demand, American is now planning to fly 55% of its domestic schedule and nearly 20% of its international schedule in July. Systemwide, this amounts to 40% of its July 2019 flying.<sup>136</sup>

Looking further into the future, American expects long-haul international capacity to be down 25% in summer 2021 compared to 2019.<sup>137</sup> The airline is planning a smaller international network in response to lower demand and to improve long-term profitability. American will exit three transatlantic routes from both Charlotte and Philadelphia, as well as five underperforming routes from Los Angeles to destinations in Asia and South America.

As American resets its international network for future growth, Dallas will become its main transpacific hub, Miami will remain its main hub for the Caribbean and Latin America, and Philadelphia will be its primary hub for service to Europe.

With the September 30 expiration of the U.S. CARES Act ending the requirement for airlines to continue serving any point served before March 1, American Airlines will remove 15 domestic destinations from its schedule. The suspensions will initially run from October 7 until November 3 and affects the following destinations: Del Rio, Texas; Dubuque, Iowa; Florence, South Carolina; Greenville, North Carolina; Huntington, West Virginia; Joplin, Missouri; Kalamzaoo/Battle Creek, Michigan; Lake Charles, Louisiana; New Haven, Connecticut; New Windsor, New York; Roswell, New Mexico; Sioux City, Iowa; Springfield, Illinois; Stillwater, Oklahoma; and Williamsport, Pennsylvania. The decision will be reviewed, should there be an extension of the Payroll Support Program

<sup>&</sup>lt;sup>137</sup> Breaking Travel News, July 1, 2020



<sup>&</sup>lt;sup>136</sup> Breaking Travel News, June 5, 2020

#### Delta Air Lines

Delta has cut its second quarter schedule by 85% year-over-year (80% domestic, 90% international). While it sharply curtailed international flying, it has resumed some services, with more following in the second half of June.<sup>138</sup>

- Delta now operates transatlantic services from Atlanta to Amsterdam, Frankfurt, London Heathrow and Paris Charles de Gaulle. It also flies from Detroit to Amsterdam and London, and from New York JFK to Amsterdam, Paris and Tel Aviv.
- Subject to foreign government approval, Delta plans to restore links to Africa with the resumption of services from Atlanta to Lagos, Nigeria.
- In Asia Pacific, Delta flies from Detroit and Seattle to Seoul, and it plans to add a Shanghai leg to both routes in the second half of June. Delta also operates less than daily services between Seattle and Tokyo Haneda. The resumption of Shanghai services is subject to government approval, and flights may be limited to one per week.
- Delta's Caribbean operationcurrentlycomprises flights from Atlanta to San Juan, St. Croix and St. Thomas, and from New York JFK to San Juan. In the secondhalf of June, Delta will restart services from Atlanta to Aruba, Bonaire, Kingston, Montego Bay, Providenciales and St. Maarten.
- Transborder operations to Mexico comprise daily services to Mexico City from Atlanta and less than daily service from Detroit and Salt Lake City. Lowfrequency service from Atlanta to Cancunand from Los Angeles to Los Cabos and Puerto Vallarta restarts in the second half of June.
- Delta had planned to return to Central America in the second half of May, but it has now delayed the start of low frequency services from Atlanta to Panama City, San Pedro Sula and San Salvador until the second half of June.
- Flights to Canada operate under a reduced schedule of daily services from Detroit to Montreal and
  Toronto, from Minneapolis to Calgary and Winnipeg, between New York and Toronto and Seattle and
  Vancouver. Delta also operates lower frequency services from Detroit to Ottawa and from Minneapolis to
  Edmonton.

Delta continued to provide domestic flights to all U.S. hubs and top markets, but with significantly reduced frequency. Per the requirements of the U.S. government's COVID-19 relief stimulus package, airlines must keep minimum service levels to be eligible for grants. <sup>139</sup> Delta had sought permission to suspend service from none smaller airports: Lansing, Grand Rapids and Flint, Mich.; Worcester, Mass.; Hilton Head, S.C.; Pocatello, Idaho; Brunswick, Ga.; and Melbourne, Fla.

On May 13, Delta suspendedservice at 10 U.S. airports, as it consolidated operations in major markets until the end of September. <sup>140</sup> The suspended airports comprised:

- Chicago Midway Chicagooperations consolidated to O'Hare
- Oakland service consolidated to San Francisco
- Hollywood Burbank and Long Beach airports service consolidated to Los Angeles
- T.F. Green and Manchester Boston Regional service consolidated to Boston Logan
- Westchester Country service consolidated to New York LaGuardia airport
- Stewart service consolidated to New York JFK airport
- Akron-Canton service consolidated to Cleveland

<sup>&</sup>lt;sup>140</sup> Business Travel News, May 8, 2020



<sup>&</sup>lt;sup>138</sup> Delta, May 29, 2020

<sup>139</sup> Business Travel News, April 29, 2020

Newport News/Williamsburg – service consolidated to Norfolk

During June, Delta will add more flights to its domestic schedule, primarily in Atlanta and New York, and between hubs. It will add back more capacity during July, but domestic capacity will still be 65% below last year's level, while international capacity will be 75% lower. Additional domestic flying will focus on Delta's hubs in Atlanta, Detroit, Minneapolis and Salt Lake City.

Capacity to Latin America and the Caribbean will be increased from 10% to 25% of usual capacity. This will include the restart of service between Atlanta and Sao Paulo. Subject to the lifting of travel restrictions, Delta plans to resume a number of transatlantic services, including New York to Athens, Lisbon and Accra, Detroit-Paris, from Boston and Seattle to Amsterdam, and between Atlanta and Lagos.

While its transpacific service will remain significantly reduced in July, Delta will resume flights from Atlanta to Seoul and from Los Angeles to Sydney. The airline will also return to China on June 25, when it starts a twice weekly Seattle-Seoul-Shanghai service. In July, frequency will drop to once-weekly, allowing Delta to add a weekly Detroit-Seoul-Shanghai service.

#### **Frontier Airlines**

During May, Frontier reduced its capacity by 80% year-over-year.

Under the terms of the Coronavirus Aid, Relief and Economic Security (CARES) Act, the U.S. Department of Transportation (DOT) rejected a request from the airline to suspend service to 33 destinations, including Sioux Falls, Cedar Rapids, El Paso, Grand Rapids and Syracuse. Because the cities were served by multiple airlines, the DOT did allow Frontier to stop operating routes to Charlotte, Detroit and Boston/Providence through June 10.

During July and August, Frontier resumed non-stop flights from Cincinnati (CVG) to Sarasota, Atlanta, Dallas and Miami. It had suspended the four routes in April. It also added frequencies on flights from CVG to Denver, Fort Myers, Las Vegas, Orlando and Tampa in anticipation of increased leisure traffic. There were also new routes from Newark to Palm Beach, Fort Myers and Myrtle Beach.

Capacity in July was still 40% lower year-over-year.

#### **Hawaiian Airlines**

Hawaiian Airlines cut 40% of its flights in April, including international routes and those to the rest of the U.S. The airline had already suspended flights to Auckland, Brisbane and Sydney because of travel restrictions imposed in New Zealand and Australia. Flights to Tahiti, French Polynesia, ceasedfrom March 21, for similar reasons.

After the state of Hawaii imposed a 14-day quarantine on arrivals, Hawaiian Airlines made further adjustments to its international schedule, suspending all routes. <sup>142</sup> Flights to Japan are suspended until July 25, when service to Sapporo may resume, followed by Tokyo Haneda and Narita, Osaka and Fukuoka on July 27. <sup>143</sup> Services to South Korea (Seoul) and French Polynesia (Papeete) are also suspended until July 27, while the suspension of flights American Samoa (Pago Pago), Australia (Brisbane and Sydney) and New Zealand (Auckland) continue until July 31.

<sup>&</sup>lt;sup>143</sup> Hawaiian Airlines, June 24, 2020



<sup>&</sup>lt;sup>141</sup> Business Travel News, June 15, 2020

<sup>&</sup>lt;sup>142</sup> Hawaiian Airlines, April 2, 2020

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Hawaiian has continued to operate a number of inter-island services, offering daily flights from Honolulu to Hilo, Kona, Lihu'e, Kahului, Moloka'l and Lana'i. Daily services between Kahului and Lihu'e, Hilo and Kona resume on July 15. All other routes are suspended through July 27.

Hawaiian has maintained daily flights to three points on the U.S. mainland: Los Angeles, San Francisco and Seattle. From July 1, it will resume service to Portland, followed by Sacramento and San Diego on July 15.

# JetBlue Airways

After a very tough few weeks of falling demand, JetBlue initially cut capacity by 40% in April and May. 144 The airline subsequently deepened these cuts to 80% for April. JetBlue's June capacity was down 79% year-over-year.

JetBlue's April schedule adjustment included big cuts to daily departures and consolidated operations at key hubs from April 15 until June 10:

- Boston daily departures reduced from 180 to 28; flights consolidated at Boston Logan International, with all services from Providence T.F. Green International airport suspended.
- San Francisco daily flights cut from 19 to two; flights operate only from San Francisco International with service from San Jose suspended.
- Washington area daily flights reduced from 34 to five, operating only from Reagan National, with service from Baltimore/Washington suspended
- New York daily flights cut from 215 to 30; flights only from JFK and NewarkLiberty, with service suspended from LaGuardia, Westchester County and Stewart International airports.
- Los Angelesarea flights cut from 44 to five per daily, operated only from Los Angeles International, after flights suspended from Long Beach, Hollywood Burbank and Ontario airports.

JetBlue also planned to file with the U.S. Department of Transportation to suspend flying at airports where it operatedonly a handful of daily flights and where demand did not support JetBlue service. At the end of April it submitted a request to suspend service at 16 airports, including Atlanta, Chicago, Dallas, Detroit, Houston, Las Vegas, Philadelphia and Seattle. 146

During July JetBlue resumedservice to nine destinations previously suspended from its schedule: Ponce and Aguadilla in Puerto Rico, Chicago O'Hare, Dallas Fort Worth, Houston Intercontinental, Martha's Vineyard, Minneapolis St. Paul. Nantucket, Philadelphia, Portland International and Providence TF Green International.

JetBlue also added services from Newark to Los Angeles, San Francisco, Charleston, Jacksonville, Austin, San Diego, Las Vegas, Phoenix and Sarasota. It also introduced new flights from New York to Dallas, Detroit, Minneapolis, Fort Myers, Tampa and St. Thomas in the U.S. Virgin Islands.

# **Southwest Airlines**

With a mostly domestic network, Southwest's business has been less affected than its competitors. But with cancellations outpacing bookings, it initially decided to lower capacity by 20% between April 14 and

<sup>&</sup>lt;sup>146</sup> Business Travel News, April 29, 2020



<sup>&</sup>lt;sup>144</sup> <u>JetBlue</u>, March 18, 2020

<sup>&</sup>lt;sup>145</sup> Jet<u>Blue</u>, April 8, 2020

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June 5. Most cuts will be in markets where Southwest has four or more non-stop flights. It also decided to suspend all international services until May 4.

On March 24, Southwest brought forward its capacity reductions, cancelling 1,500 of its 4,000 daily flights running from March 27 until April 14, when the next round of capacity cuts are set to begin. 147

Southwest subsequently decided to deepen its capacity cuts to more than 40% from May 3 through June 5, and by 50% during June. 148 It then deepened these figures to 60-70% and 45-55% respectively. By May 18, improving demand meant bookings were once again exceeding cancellations.

Southwest intends to continue flying to all domestic destinations, maintaining nearly every city pair in its domestic schedule prior to the pandemic. Some journeys that had been non-stop may now require a technical stop or a connection. The airline continues to evaluate further reductions.

Southwest will continue its policy of keeping middle seats free at least until September 30, effectively reducing available capacity by one-third. People traveling together who wish to use the middle seat are still allowed to do so.

Amid weaker-than-expecteddemand growth, Southwest scaled back its capacity plans. For July, capacity was 30% lower year-over-year (YoY); it had also planned for August to be 20% lower, <sup>150</sup> but the airline subsequently revised this down to 27%. Capacity in September is expected to be 40% lower YoY, with October in the 40-50% range.

# **Spirit Airlines**

Ultra-low-cost carrier Spirit Airlines operated just 50 daily flights in May, rising to 150 in June. The airline is now planning to operate 80% of its 2019 capacity in July, as it reintroduces flights. It aims to serve 63 of its 75 destinations, operating 550 daily flights.

Capacity was down 80% year-over-year in June; in July this will be reduced to 16%.

During June, Spirit resumed international services to Cancun and to Ecuador.

# **United Airlines**

United Airlines had aimed to cut its April schedule by 68%, including a 52% reduction in domestic services. By April 8, it had deepened the cuts to 78% and 67% respectively.

In the domestic segment it suspended all flights between the mainland and Hawaii except a daily San Francisco-Honolulu operation. <sup>151</sup> United also suspended mainland domestic routes from its hubs at Chicago O'Hare, Denver, Newark, Washington Dulles, Houston, Los Angeles, San Francisco, but it cut all service to just two Californian markets: Mammoth Lakes and Stockton. The airline is monitoring demand and changes in curfews and restrictions and will adjust its schedule accordingly.

United cut its international schedule by 90% in April, continuing daily operations on just six routes:152

• Newark to Frankfurt, London and Tel Aviv

<sup>&</sup>lt;sup>152</sup> United Airlines, March 25, 2020



<sup>&</sup>lt;sup>147</sup> Business Travel News, March 24, 2020

<sup>&</sup>lt;sup>148</sup> Southwest Airlines, March 31, 2020

<sup>&</sup>lt;sup>149</sup> Business Travel News, June 17, 2020

<sup>&</sup>lt;sup>150</sup> Southwest Airlines, Q2 2020 results

<sup>&</sup>lt;sup>151</sup> United Airlines, April 2, 2020

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- Houston to Sao Paolo
- San Francisco to Tokyo Narita and Sydney

In the transborder market, United suspended all flying to Canada from April 1, but it maintained a small number of flights to Mexican destinations.

United also cut its scheduled capacity for May and June by 90% compared to its pre-pandemic plans. However, with cancellation and no-show rates lower than in April, and North American demand showing a modest improvement, United lowered its July capacity cut to 75%.

United plans to restore 150 flights to its domestic schedule in July. Services will target leisure destinations in states that have been faster to reopen and ease lockdowns. United will operate more flights to leisure destinations in Florida, Las Vegas, Charleston, Portland (Maine), Aspen and Jackson Hole. It will also increase flights to New York, Boston, Seattle and Philadelphia and resume cross-border services to Calgary, Montreal, Toronto and Vancouver.

During July, United will begin rebuilding its Asia Pacific schedule. From July 8, it will resume service between San Francisco and Shanghai with twice-weekly flights. During the month United will also start Chicago-Tokyo Haneda flights and resume service from the U.S. to Seoul, Hong Kong and Singapore (via Hong Kong). In September, the airline will resume Chicago-Hong Kong and Los Angeles-Sydney services. <sup>153</sup>

During August, United will operate 48% of its domestic schedule, compared to 30% in July, and 25% of its international schedule, compared to 16% previously. Domestic growth will focus largely on United's hubs in Chicago, Houston and Denver. United will also double its flights from Newark compared to July, with extra flights to leisure destinations including Aspen, Bangor, Bozeman and Jackson Hole. The airline will also add more flights to Hawaii, the Caribbean and Mexico, while its transatlantic schedule will include the restoration of services from Chicago to Brussels and Frankfurt, from San Francisco to London, and from Newark to Brussels, Munich and Zurich.

By September, United plans to be operating 30% of its pre-COVID019 international schedule. This will include the restart of destinations in the Caribbean and Latin America, including Cabo San Lucas, Puerto Vallarta, San Jose and Liberia. It will also add 40 daily flights to 48 domestic routes and will resume service to Hawaii with flights to Hilo and Kauai from the mainland.

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# Chinese airlines

To ensure international flights continue to operate without promoting the spread of COVID-19, the Civil Aviation Authority of China (CAAC) is limiting each airline to one route per country. At the moment, Chinese airlines may operate only one weekly return service per route, with a maximum passenger load factor of 75%.

<sup>&</sup>lt;sup>154</sup> Business Travel News, July 1, 2020



<sup>153</sup> Business Travel News, July 7, 2020

#### Air China

Until April 30, Air China operated the following schedule of international flights:

- Asia: Beijing-Delhi, Islamabad, Karachi, Phnom Penh, Seoul and Yangon; Shanghai-Bangkok, Singapore and Tokyo; and Chengdu-Kathmandu
- Europe: Beijing-Athens, Copenhagen, Madrid, Minsk, Moscow, Paris, Stockholm, Vienna and Warsaw; Shanghai-Frankfurt and London
- Middle East: Beijing-Dubai
- North America: Beijing-Los Angeles and Vancouver

#### China Eastern

China Eastern expects to restore most (94%) of its domestic network by the end of July. Daily domestic flights have increased from 200 in February to 2,000 in mid-July.

During August, China Eastern and its Shanghai Airlines subsidiary plan to operate 22 international flights per week, with 18 destinations served weekly from Shanghai:

- Europe Amsterdam, Frankfurt, London, Paris
- North America New York JFK, Toronto
- Northeast Asia Seoul, Tokyo
- South Asia Colombo, Delhi
- Southeast Asia Bangkok, Kuala Lumpur, Manila, Phnom Penh, Singapore, Yangon
- Southwest Pacific Auckland, Sydney

The remaining flights comprise weekly services from Hangzhou to Sydney and from Xi'an to Tokyo Narita, and twice-weekly flights between Kunming and Vientiane in Laos.

# Other major airlines

Airline	Action and plans
ANA	Continues to scale back domestic and international services, but maintaining service in many markets
Asiana	International services suspendedor reduced for April and May. Flights to 11 Chinese destinations, Southeast Asia and U.S. resuming in May
Cathay Pacific	Capacity cut by 97% in April and May. During June/July, rebuilding networkto 28 destinations, but still operating less than 10% of capacity
Japan Air Lines	Most international services suspended. Rebuilding international and domestic services during June and July
Korean Air	Most international services groundeduntil May 31. Service being restored to a number of international markets during June

# **ANA**

Over the period from March 29 until April 24, All Nippon Airways (ANA) made changes to its international schedule affecting 3,943 flights across 71 different routes ranging from service suspensions to frequency



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reductions.<sup>155</sup> The airline maintained daily services to many international destinations, but it continued to adjust its schedule.

By July, ANA had scaled back its international network to just 16 destinations.

- Asia/Oceania Tokyo-Hanoi(2 per week), Hong Kong (1), Jakarta (4), Kuala Lumpur (6), Manila (3), Shanghai (1), Singapore (6), Sydney (6). Tokyo-Qingdao launching August 1
- **Europe** Frankfurt (5), London (3)
- North America Chicago (7), Los Angeles (7), Mexico City (10), New York (4), San Francisco(3), Vancouver
   (3). Tokyo-San Jose launching August 1

#### **Domestic**

ANA also continued to adjust its domestic schedules. It announced frequency reductions on its services from Tokyo Narita to Osaka Itami, Nagoya, Sapporo, Fukuoka and Sendai and from Sapporo to Aomori and Hiroshima. Most reductions remained in place until the end of June.

#### Asiana Airlines

After the European Union decided to block the entry of foreign travelers for 30 days, Asiana suspended most European routes during April. Its Seoul-Frankfurt service was suspended for a shorter period, running from April 1 until April 16. This service resumed on April 17, operating during May at three flights per week.

For the July-August period, Asiana will serve the following destinations: 157

Region	<u>Destinations served</u>
Central Asia	Almaty, Tashkent
Southeast Asia	Bangkok, Hanoi, Ho Chi Minh City, Jakarta, Manila, Phnom Penh, Singapore
Oceania	Saipan, Sydney
Northeast Asia	Changchun, Hong Kong, Nanjing, Osaka, Taipei, Tokyo
Europe	Frankfurt, Istanbul, London, Paris
U.S.	Los Angeles, New York JFK, San Francisco, Seattle

# **Cathay Pacific**

Cathay Pacific and Cathay Dragon reducedcapacity by 97% across their passenger networks in April and May because of the severe drop in demand. This was mainly in response to the impact of multiple government travel restrictions imposed around the world.

While capacity remains substantially reduced, Cathay Pacific slowly reinstatedits schedule during June and July. After operating just 3% of normal capacity in May, this increased to 4% in June. During July, Cathay Pacific and Cathay Dragon planned to operate 9% of capacity. 158

By the end of July, the two airlines had rebuilt their networks to include the following destinations:

- China Beijing, Chengdu, Shanghai, Xiamen
- Asia Bangkok, Ho Chi Minh City, Jakarta, Kuala Lumpur, Manila, Singapore, Taipei, Tokyo

<sup>&</sup>lt;sup>158</sup> Cathay Pacific, June 12, 2020



<sup>&</sup>lt;sup>155</sup> ANA, March 31, 2020

<sup>&</sup>lt;sup>156</sup> Korea Herald, March 20, 2020

<sup>&</sup>lt;sup>157</sup> Asiana, 10 June, 2020

#### **Research and Intelligence**

- Southwest Pacific Melbourne, Sydney
- Europe Amsterdam, Frankfurt, London
- Americas Los Angeles, New York (JFK), San Francisco, Toronto, Vancouver

#### **JAL**

Japan Airlines (JAL) has suspended most international services. During July, the airline will operate flights to the following destinations:<sup>159</sup>

- North America Boston, Chicago, Dallas, Los Angeles, New York, San Diego, San Francisco, Seattle, Vancouver
- Europe Frankfurt, Helsinki, London, Paris
- Southeast and South Asia Bangkok, Hanoi, Ho Chi Minh City, Jakarta, Kuala Lumpur, Manila
- East Asia Dalian, Hong Kong, Kaohsiung, Taipei
- Pacific Melbourne, Sydney

JAL has also made adjustments to its domestic schedule. It reduced flying by at least 72% until June 14. For the second half of June, JAL operated slightly under half of its usual domestic network, reducing the number of daily flights it has suspended from 613 to 461. With demand expected to recover to 50% of its pre-pandemic levels during July, for the second half of the month JAL will operate 66% of its normal domestic schedule.

#### Korean Air

More than 90% of Korean Air's aircraft are now grounded. The airline has scaled back its domestic operation, flying a reduced schedule on six routes only: Seoul Gimpo to Busan, Jeju and Ulsan, and from Jeju to Busan, Cheongju, Daegu and Gwangju. Most other domestic routes are suspended until May 17, while flights from Seoul Incheon to Busan and Daegu are grounded until the end of May. <sup>161</sup>

Korean Air also suspended most international routes until April 30. In mid-April, it extended these suspensions until May 31, and added North American destinations Honolulu, Vancouver and Washington D.C. to the list of suspended routes.

Korean Air delayed plans for the May resumption of some flights to China: Beijing (4 per week), Guangzhou (4 pw), Mudanjiang (3 pw), Qingdao (4 pw), Shanghai (4 pw) and Yanji (4 pw). It also intended to increase frequency on its single ongoing Chinese route to Shenyang from weekly to four times weekly.

Region	Suspended until May 31	Operating
Americas	Dallas, Honolulu, Las Vegas, Toronto, Vancouver, Washington D.C.	Atlanta (4 per week), Chicago (3 pw), Los Angeles (daily), New York JFK (daily), San Francisco (3 pw)
Europe	Amsterdam, Barcelona, Budapest, Frankfurt, Madrid, Milan, Prague, Rome, Vienna, Zagreb, Zurich	London (2 pw), Paris (2 pw)
Middle East	Dubai, Istanbul, Tel Aviv	
Northeast Asia	Aomori, Changsha, Dalian, Fukuoka, Hangzhou, Hefei, Hong Kong, Jinan, Kagoshima, Komatsu, Kunming, Nanjing, Nagoya, Niigata, Okayama, Okinawa, Osaka, Tianjin,	Beijing (4 pw), Guangzhou (4 pw), Mudanjiang, Qingdao, Shanghai (4 pw), Shenyang (4 pw), Tokyo (daily), Ulanbaatar, Yanji

<sup>&</sup>lt;sup>159</sup> JAL, June 10, 2020

<sup>&</sup>lt;sup>161</sup> Korean Air, April 14, 2020



<sup>&</sup>lt;sup>160</sup> Business Travel News, June 10, 2020

# **Research and Intelligence**

Sapporo, Shenzhen, Taipei, Weihai, Wuhan, Xi'an, Xiamen,

Zhangjiajie, Zhengzhou

Russia and CIS Irkutsk, Moscow, St. Petersburg, Tashkent, Vladivostok

South Asia Delhi, Colombo, Kathmandu, Male, Mumbai

Southeast Asia Cebu, Chiang Mai, Clark, Da Lat, Da Nang, Denpasar, Hanoi, Bangko

Ho Chi Minh City, Jakarta, Kuala Lumpur <sup>a</sup>, Nha Trang,

Phuket, Singapore, Yangon <sup>a</sup>,

Southwest Pacific Auckland, Brisbane, Guam, Sydney

Bangkok (daily), Manila (daily), Phnom

Penh (2 pw)

During June, Korean Air will expand international operations to 146 flights per week across 32 routes, compared to 55 flights per week on 13 routes in May. 162

Korean Air will increase existing service to Shenyang and restore services to Beijing, Shanghai, Guangzhou, Mudanjiang, Qingdao, and Yanji in China, as well as to Taipei and Ulaanbaatar. In Southeast Asia, it will restore some service to Kuala Lumpur, Yangon, Hanoi, Ho Chi Minh City and Singapore, as well as increasing service to Phnom Penh.

Korean Air will also increase weekly frequencies to London and Paris and restore some services to Amsterdam and Frankfurt.

In North America, Korean will restart flights to Washington D.C., Seattle, Vancouver and Toronto, while increasing flights to Atlanta and Chicago. It will maintain seven weekly flights each to Los Angeles and New York.

Service to the Oceania region will remain suspended during June.

### Low-cost carriers

Airline	Action and plans
AirAsia Japan	All operations suspended until June 30
HK Express	Resumption of service delayed to August 2
Jetstar Japan	Now operating 23 domestic routes, but international flying suspendeduntil August
Peach	All domestic routes reopenedon June 19

# AirAsia Japan suspends operations until end of June

AirAsia Japan halted all flights on April 9. On May 19, the airline announced plans to extend the suspension of all operations from May 31 until June 30. It has not responded to the government's subsequent lifting of the state of emergency on May 25.

# HK Express delays flight resumption

Cathay Pacific-owned low-cost carrier HK Express has delayed the resumption of flights from July 11 until August 2. The Hong Kong-based airline attributed its decision to continued travel restrictions around Asia Pacific. HK Express has suspended all flights since March 23.

<sup>&</sup>lt;sup>162</sup> Business Travel News, May 13, 2020



# Jetstar Japan restarts domestic flights

During July, Jetstar Japan will operate 23 domestic routes: 163

- Tokyo Narita Kagoshima, Kochi, Kumamoto, Miyazaki, Nagasaki, Naha (Okinawa), Oita, Osaka Kansai, Shimojishima Kuko, Shonai, Takamatsu
- Osaka Kansai Fukuoka, Kumamoto, Naha, Sapporo, Shimojishima Kuko, Tokyo Narita
- Nagoya Fukuoka, Kagoshima, Naha, Sapporo

Jetstar's limited international operation remains suspended until the beginning of August, when it plans to reinstate flights to Manila from Tokyo Narita, Osaka Kansai and Nagoya, and from Tokyo to Shanghai and Taipei. Service from Tokyo to Hong Kong will resume on September  $1.^{164}$ 

#### Peach resumes domestic service

ANA-owned low-cost carrier Peach resumedlimited domestic flying on June 1. By June 19, it had resumed service on all 22 domestic routes. <sup>165</sup> It intends to fully restore its schedule by July 22, and it may increase flights on some routes after August 1.

# South Asia back to top

# Major airlines

Airline	Action and plans
Air India	All flights suspended until May 31
Biman Bangladesh	Domestic flights resumed June 1. International flights banned until June 15
PIA	International operations grounded until May 31. Domestic flights resumed on May 16
SriLankan Airlines	Limited international operations resumed May 28

#### Air India

As India entered an initial 21-day lockdown period, Air India suspended all scheduled domestic and international flights from March 24 until midnight on April 14. <sup>166</sup> With the national lockdown progressively extended until May 3, then until May 17, and most recently until the end of May, Air India had not planned to resume domestic or international flights until May 31. Air India has yet to respond to government plans to allow the restart of domestic flying earlier than planned on May 25.

#### Biman Bangladesh

Biman Bangladesh initially stopped flights on 15 of its 17 international routes for varying time periods, depending on the length of travel restrictions imposed by individual countries. Service on its two remaining routes to London and Manchester ended on March 30.

<sup>&</sup>lt;sup>166</sup> CNBC, March 26, 2020



<sup>&</sup>lt;sup>163</sup> <u>Jetstar Japan</u>, June 29, 2020

<sup>&</sup>lt;sup>164</sup> Jetstar Japan, July 2, 2020

<sup>&</sup>lt;sup>165</sup> Peach, June 19, 2020

#### **Research and Intelligence**

Biman Bangladeshthenceased all flights. While international flights are suspended until at least June 15, the Bangladeshi flag carrier restarted domestic services on June 1. From capital city Dhaka, Biman Bangladesh is planning to offer flights to Chittagong, Sylhet and Saidpur.

# PIA

In accordance with instructions from the Government of Pakistan and the Civil Aviation Authority of Pakistan, Pakistan International Airlines (PIA) initially suspended all international flights until April 4.<sup>167</sup> On April 6, PIA extended the suspension until April 11 and grounded its remaining domestic services.

On April 18, the Pakistan Civil Aviation Authority extended the flight ban until April 30, <sup>168</sup> with the Aviation Division of Pakistan then further extending the ban on international flights until May 31.

From May 16, Pakistani authorities allowed the country's airlines to resume domestic services from five major airports: Islamabad, Karachi, Lahore, Peshawar and Quetta. PIA has already resumed service between Karachi and Lahore. 169

#### SriLankan Airlines

SriLankan Airlines scaled back all international operations from March 19, when the Civil Aviation Authority of Sri Lanka banned passenger arrivals from overseas. <sup>170</sup> During the ban, which was originally due to end at midnight on April 7, SriLankan continued to operate some flights from Colombo to London, Melbourne and Tokyo (Narita). Passengers couldcontinue to depart from or transit through Colombo airport.

SriLankan suspended all operations for two weeks from April 8 until April 21 due to travel restrictions introduced at the remaining destinations it was serving. On April 25, SriLankan extended the suspension of all passenger flights until May 15.<sup>171</sup>

With some travel restrictions being relaxed, SriLankan Airlines has, since May 28, offered flights from Colombo to Hong Kong, London Heathrow, Tokyo Narita and Melbourne. This schedule remains in place until June 15. Returning flights from London, Melbourne and Tokyo may only carry passengers transiting via Colombo within 12 hours.

#### Low-cost carriers

Airline	Action and plans
AirAsia India	All flights suspended from March 25 until May 31
GoAir	All flights suspended from March 25 until May 31
IndiGo	Resuming some domestic flights from May 25
SpiceJet	All flights suspended from March 25 until May 31

<sup>&</sup>lt;sup>167</sup> PIA, March 29, 2020

<sup>&</sup>lt;sup>172</sup> SriLankan Airlines, May 29, 2020



<sup>&</sup>lt;sup>168</sup> ARY News, April 18, 2020

<sup>&</sup>lt;sup>169</sup> Economic Times, May 16, 2020

<sup>&</sup>lt;sup>170</sup> SriLankan Airlines, March 29, 2020

<sup>&</sup>lt;sup>171</sup> SriLankan Airlines, April 25, 2020

#### AirAsia India

In line with India's nationwide lockdown, AirAsia India suspended all flights, initially for three weeks, from midnight on March 24. It must now wait until May 25 before being allowed to resume operations.

#### GoAir

Indian low-cost carrier GoAir initially suspended all international operations from March 17 until April 15. Effective from midnight on March 24, the airline added all domestic services to the suspension.

By April 8, the airline was accepting bookings for domestic flights from April 15, followed by international services from May 1. This proved to be a premature move, with India suspending all flights until May 31. Although the date for the resumption of domestic flights has been brought forward to May 25, GoAir's website still shows the airline grounded until May 25.

#### IndiGo

India's largest airline IndiGo cancelled its Delhi-Istanbul and Chennai-Kuala Lumpur flights from March 18 until the end of the month. From March 25, IndiGo followed other Indian carriers in suspending all operations until midnight on April 14.

IndiGo will resume some domestic services from May 25, six days earlier than previously announced. It has yet to announce its schedule.

# SpiceJet

Low-cost carrier SpiceJet suspended the majority of its international flights from India between March 21 and April 30. It then suspended all remaining international operations and its entire domestic schedule from midnight on March 24, with flights set to resume on April 15. SpiceJet had not intended to resume service until May 31, but it brought this forward to May 25.

# Other airlines

Airline	Action and plans
Nepal Airlines	All international flights cancelleduntil April 15
Vistara	Domestic operationresumedduring May. Limited internationalservice restarting in September

#### **Nepal Airlines**

Nepal Airlines cancelled its Indian services from Kathmandu to Bangalore, Delhi and Mumbai until April 15. The airline also suspended its international services to Bangkok, Guangzhou, Doha, Dubai, Hong Kong, Kuala Lumpur and Tokyo Narita until the same date.

#### Vistara

Indian full-service airline Vistara suspended all international operations from March 22 until April 15. Domestic services were suspended from March 25, also until April 25. Vistara resumed domestic operations on May 25, but international services are generally suspended.



# **Research and Intelligence**

At the end of August, Vistara launched a brand-new thrice weekly service between Delhi and London Heathrow, operated until September 30 under a bilateral "transport bubble" arrangement. The airline is in discussions to launch long-haul services to other European countries. Vistara is planning special flights to Frankfurt and Paris.

# Southeast Asia back to top

# Major airlines

Airline	Action and plans
Garuda Indonesia	40 domestic routes operated from Jakarta and low frequency service to 11 international destinations
Malaysia Airlines	13 domestic and 23 international destinationsservedwith low frequency
Philippine Airlines	Operating 21 domestic routes from Manila. Serving 27 international airports by the end of August
Singapore Airlines	Singapore Airlinesand SilkAir operating 6-7% of pre-COVID-19 capacity in July and August

#### Garuda Indonesia

From February 5, Garuda suspended all flights to mainland China, covering services from Jakarta to Guangzhou and Shanghai, and from Denpasar to Beijing, Guangzhou, Shanghai, Xi'an and Zhengzhou. 174

Up to the end of July, Garuda operated around 40 domestic routes from Jakarta. The schedule included daily services to 18 destinations including Balikpapan, Banda Aceh, Banjarmasin, Batam, Denpasar, Medan, Padang and Pekanabaru.<sup>175</sup> As at August 8, Garuda has yet to update this information.

Until the end of August, Garuda also operates flights from Jakarta to 11 international destinations:

- Europe Amsterdam(1)
- Northeast Asia Hong Kong (3), Osaka (1), Seoul (2), Tokyo Haneda (2)
- Southeast Asia Bangkok (1), Kuala Lumpur (3), Singapore (5)
- Southwest Pacific Melbourne (1 per 14 days), Perth (1 per 14 days), Sydney (1 per 14 days)

From September, Garuda will steadily increase service to Amsterdam, rising to 5 per week during October. It will also increase Singapore to a double daily service and launch new twice-weekly services to Singapore from Denpasar and Surabaya.

All other international routes remain suspended until further notice.

<sup>&</sup>lt;sup>175</sup> Garuda Indonesia, July 15, 2020



<sup>&</sup>lt;sup>173</sup> Cirium, August 28, 2020

<sup>&</sup>lt;sup>174</sup> Garuda Indonesia, March 20, 2020

# Malaysia Airlines

From March 22 until June 30, Malaysia Airlines reduced services across its network. Cancellations ranged from specific flights to entire routes and changed over time. During July, it operated the following: 176

- Domestic from Kuala Lumpur
  - Alor Setar, Johor Bahru, Kota Bharu, Langkawi, Terengganu, Labuan, Miri, Sandakan, Tawau (all twice weekly)
  - Bintulu, Kuantan and Sibu (all weekly)
  - Kuching (5 times weekly)
- International from Kuala Lumpur
  - Europe: London (2)
  - Northeast Asia: Guangzhou (1), Osaka (2), Seoul (2), Taipei (1), Tokyo(2)
  - South Asia: Bangalore (1 per week), Chennai (1), Colombo(1), Delhi (1), Dhaka (2), Kathmandu
     (2), Kochi (1), Mumbai (1)
  - O Southeast Asia: Bangkok (4), Jakarta (4), Manila (3), Singapore (5), Surabaya (1)
  - Southwest Pacific: Adelaide (1), Brisbane (1), Melbourne (1), Sydney (1)

During September, Malaysia Airlines will increase the frequency of flights operated from Kuala Lumpur to three destinations in Sabah: Kota Kinabalu, Sandakan and Tawau.

# **Philippine Airlines**

Philippines Airlines (PAL) grounded all domestic flights from March 17. It also scaled back its international operations, maintaining flights only to Jakarta, Los Angeles, New York JFK, San Francisco and Tokyo. These remaining flights were suspended from March 26, initially until April 14.<sup>177</sup>

On June 1, PAL resumed operating scheduled flights on selected domestic and international routes, progressively adding new routes and increasing frequencies during the month. <sup>178</sup> As at August 7, it linked Manila to 25 international airports, but service to at least 19 points remained suspended:

- Europe London Heathrow (1 per week)
- Northeast Asia Fukuoka (1), Hong Kong(1), Nagoya (2), Osaka Kansai(3), Taipei (1), Tokyo Haneda (3), Tokyo Narita (3)
- Southeast Asia Bangkok (1 per 14 days), Ho Chi Minh City (1), Jakarta (1 per 14 days), Kuala Lumpur (1),
   Singapore (3-4)
- Middle East Dammam (2), Doha (1), Dubai (2), Riyadh (2)
- North America Guam (1), Honolulu (1), Los Angeles (4), New York (1), San Francisco (2), Toronto (1), Vancouver (2)
- Southwest Pacific Sydney (single flight operated during July)
- Still suspended Auckland, Beijing, Brisbane, Busan, Denpasar, Guangzhou, Hanoi, Macau, Melbourne, Phnom Penh, Perth, Port Moresby, Quanzhou, San Francisco, Sapporo, Seoul Incheon, Shanghai and Xiamen

By the end of August, PAL plans to resume service to Port Moresby and Seoul. The airline is also operating international services linking Cebu and Tokyo, with one flight operated every two weeks.

<sup>&</sup>lt;sup>178</sup> PAL, May 31, 2020



<sup>&</sup>lt;sup>176</sup> Malaysia Airlines, June 8, 2020

<sup>&</sup>lt;sup>177</sup> Philippine Airlines, March 24, 2020

# **Research and Intelligence**

From June 3, PAL also restarted domestic flying. During August, it operated flights from Manila to Bacolod, Basco, Butuan, Cagayan de Oro, Catarman, Cebu, Cotabato, Davao, Dipolog, Dumaguete, General Santos, Iloilo, Kalibo, Laoag, Legazpi, Ozamiz, Pagadian, Puerto Princesa, Roxas, Tacloban and Zamboanga. PAL has also relaunched flights from Cebu to Cagayan de Oro, Davao, Dumaguete, Tacloban and Zamboanga, and from Clark to Davao.

# **Singapore Airlines**

On March 18, Singapore Airlines (SIA) announced a 50% cut in capacity until the end of April. But as border controls around the world tightened further, it decided to cut 96% of scheduled capacity, resulting in the grounding of 138 of the 147 aircraft operated by SIA and regional carrier SilkAir. Low-cost division Scoot also suspendedmost of its network and grounded all but two of its 49 aircraft.

Together, SIA and SilkAir will operate 6% of pre-COVID-19 passenger capacity in July, rising slightly to 7% in August. <sup>179</sup> During August, service was restored to XX destinations: Istanbul, Milan, Perth, Phnom Penh, Surabaya and Taipei. Between August and November, the two airlines will operate the following schedule to 34 destinations:

- Europe Amsterdam (3 per week), Barcelona (1), Copenhagen (1), Frankfurt (5), London (13), Milan (1),
   Paris (3), Zurich (3)
- Middle East Istanbul (1)
- North America Los Angeles (3)
- Northeast Asia Chongqing (1), Hong Kong (7), Osaka (3), Seoul (6), Shanghai (1), Taipei (3), Tokyo(3)
- Southeast Asia Bangkok (3), Cebu (2), Hanoi (1), Ho Chi Minh City (2), Jakarta (10), Kuala Lumpur (7),
   Manila (2), Medan (2), Phnom Penh(2), Surabaya (2)
- Southwest Pacific Adelaide (2), Auckland (5), Brisbane (4), Christchurch (3), Melbourne (5), Perth (3), Sydney (6)

#### Thai Airways

With Thailand implementing a state of emergency on March 26, Thai Airways grounded all international flights by April 1. From March 25, it had transferred its domestic services to Chiang Mai, Krabi and Phuket to subsidiary Thai Smile. Since June 1, Thai has offered bookings on Thai Smile domestic services from Bangkok to Chiang Mai, Chiang Rai, Phuket, Krabi, Surat Thani, Narathiwat, Hat Yai, Ubon Ratchathani, Udon Thani and Khon Kaen.

On July 31, Thai Airways announced an extension to the temporary suspension of its international operations until the end of September 2020. 180 It had previously grounded flights until the end of August. The airline does operate special international flights to a number of destinations, including Copenhagen and London.

<sup>&</sup>lt;sup>180</sup>Thai Airways, Temporary Suspension of International Flights



<sup>&</sup>lt;sup>179</sup> Singapore Airlines, July 17, 2020

# Low-cost carriers

Airline	Action and plans
AirAsia	Short-haul operations suspended from March 28 until April 21; long-haul flights grounded until May 31. Domestic flights resuming on April 29
Cebu Pacific	Domestic operations grounded until the beginning of June. International services suspended until July
Indonesia AirAsia	All flights suspended. Domestic flights may resume June 8, and international flights on June 19
Jetstar Asia	Operating low-frequency servicesto eight destinations during August
Jetstar Pacific	Resuming domestic services from May
Lion Air	Indonesia-Malaysia flights suspended until March 31
Nok Air	International services suspendeduntil May 31
NokScoot	All flights suspended. Carrier is being liquidated
Philippines AirAsia	Domestic flights resuming during June, with international flights restarting from July 1
Scoot	Low frequency services to nine destinations operatedduring July
Thai AirAsia	International flights suspended from March 22 until April 25. Domestic flights resumed on May 1
Thai Lion Air	All operations suspended between March 25 and April 15. Domestic flights from Bangkok restarted on May 1
Thai VietJet	Resumed some domestic flights from May 1
VietJet	Flights across Southeast Asia suspended from March 20. Flights on three domestic routes resuming soon

#### AirAsia

Malaysian short-haul carrier AirAsia suspendedall operations from March 28 due to growing border restrictions imposed by countries across Asia. The airline was grounded until April 21. Long-haul sister airline, AirAsia X, also suspended operations, but will remain grounded until May 31.

AirAsia is planning to resume domestic operations from April 29. <sup>181</sup> It will initially operate low-frequency services from Kuala Lumpur to Kota Bharu, Kota Kinabalu, Kuching, Miri, Penang, Sandakan, Sibu and Tawau. There will be 40 weekly frequencies across these eight routes, compared to 487 in the same week of 2019.

### Cebu Pacific

In line with the national and Cebu provincial government directives on community quarantines to contain the spread of COVID-19, Filipino carrier Cebu Pacific cancelled all domestic flights from its Manila and Cebu hubs from March 17. <sup>182</sup> On March 20, all remaining domestic flights operated by Cebu Pacific and regional subsidiary Cebgo were cancelled.

Cebu Pacific continued to operate some international services, but eventually suspended all operations.

<sup>&</sup>lt;sup>182</sup> Cebu Pacific Air, March 17, 2020



<sup>&</sup>lt;sup>181</sup> <u>Anna.Aero</u>, April 22, 2020

# **Research and Intelligence**

All international flights remain cancelled until August 30, 2020, with the exception of twice-weekly services from Manila to Dubai and Singapore, and weekly services to Seoul.

Because of the imposition of Modified Enhanced Community Quarantine (MECQ) over Metro Manila, all Cebu Pacific and Cebgo domestic flights from Manila are cancelled until August 18. The airline continues to operate weekly flights from Cebu to Clark and Davao.

#### Indonesia AirAsia

From March 30, Indonesia AirAsia initially suspended domestic flights until April 21 and international services until May 17. It since delayed the resumption of domestic flights until May 7. Indonesia AirAsia now aims to restart domestic services on June 8, initially operating a limited schedule.

Indonesia Asia had planned to reopen its first two international routes – from Surabaya to Kuala Lumpur and Johor Bahru in Malaysia – on May 18.<sup>183</sup> However, due to operational reasons and extended periods of social restrictions in some markets, it delayed the start of the two services to June 19 and July 1 respectively.

All passengers must wear face masks from check-in through to baggage collection at their destination. Passengers must also bring a spare mask, hand sanitizer and avoid carrying too much luggage.

#### Jetstar Asia

Singapore-based Jetstar Asia suspended all services from March 23 until April 15. It then extended the flight suspension until May 31, after the Singapore Government decided to maintain "circuit breaker" border restrictions until June  $1.^{184}$ 

With border restrictions remaining in place across Asia, in mid-June, Jetstar Asia extended the suspension of all flights until July 31. It also delayed the launch of a new Singapore-Colombo service from July 1 until October 26, 2020. The airline subsequently extended the suspension of most services until August 31, with services to Darwin and Shantou suspended until October 24 and 25 respectively.

As at August 7, Jetstar Asia was operating low-frequency services to Bangkok, Kuala Lumpur and Manila. On August 10, it reintroduced weekly services to Ho Chi Minh City, Jakarta and Penang, with weekly services to Clark and Medan following on August 17.

#### **Jetstar Pacific**

From May, Vietnam Airlines-backed low-cost carrier Jetstar Pacific is resuming domestic services. It will restart daily flights from Hanoi to Da Lat, Nha Trang and Phu Quoc, and from Ho Chi Minh to Hai Phong, Thanh Hoa, Vinh, Hue, Da Lat, Nha Trang and Phu Quoc. 185 It will also three-times daily service from Hanoi to Can Tho, Tuy Hoa, Quy Nhon, Buon Ma Thuot, Pleiku, Hue, Vinh and Chu Lai, and from Ho Chi Minh City to Quy Nhon, Buon Ma Thuot, Pleiku, Dong Hoi and Chu Lai.

#### Lion Air

Indonesia's largest domestic carrier appears so far to have only suspended international flights to and from Malaysia between March 18 and March 31 after that country went into lockdown. These flights are

<sup>&</sup>lt;sup>185</sup> Breaking Travel News, April 28, 2020



<sup>&</sup>lt;sup>183</sup> Jakarta Post, May 4, 2020

<sup>&</sup>lt;sup>184</sup> CNA, May 1, 2020

#### **Research and Intelligence**

mainly operated by Lion Air Group airlines Malindo Air, Batik Air and Wings Air. The suspension affects 10 routes: Aceh-Penang, Medan-Penang, Jakarta-Penang, Pekanbaru-Malaka, Pekanbaru-Subang, Jakarta-Kuala Lumpur, Bandung-Kuala Lumpur and Denpasar-Kuala Lumpur. 186

#### Nok Air

Thai short-haul low-cost airline Nok Air has halted the three international routes it operates from Bangkok to Hiroshima, Yangon and Ho Chi Minh City until the end of May. It will maintain domestic flights according to demand.

# NokScoot

Having suspended all operations since March, NokScoot's two main shareholders, Scoot and Nok Air, entered discussions in June over the carrier's future. On June 26, seeing no path to recovery, the airline's board voted to liquidate the company.

# Philippines AirAsia

Following the imposition of travel restrictions on the country's main Luzon island group, Philippines AirAsia halted all flying from March 20. It plans to resume four domestic routes from Manila and Clark on June 5. Five other routes will restart from June 8, with international flying resuming on July 1.

#### Scoot

Singapore Airlines' low-cost division Scoot operatedscheduled services to nine destinations during July: 187

- Northeast Asia Guangzhou(1 per week), Hong Kong (3), Nanjing (1), Taipei (1)
- Southeast Asia Ipoh (1), Kuching(1), Penang (1), Surabaya (1)
- Southwest Pacific Perth (3)

#### Thai AirAsia

Thai AirAsia suspended international flights on March 22 and had planned to resume them on April 25. Flights to China, Cambodia, Singapore and Vietnam were hardest hit by the suspension.

Thai AirAsia continued to operate domestic flights, but it suspended these also during April. The airline resumed domestic flying from May 1 with services from Bangkok Don Mueang International, Chiang Mai, Chiang Rai and Hat Yai airports.<sup>188</sup>

Long-haul sister airline Thai AirAsia X suspended flights to Japan and South Korea on March 17 for up to three months. It will also permanently end its Bangkok-Brisbane service from April 7.

#### Thai Lion Air

The Thai division of Indonesian low-cost carrier Lion Air suspendedall operations from March 25 initially until April 15. China, Japan, Indonesia and Singapore are its biggest international markets.

Thai Lion Air resumed domestic services from Bangkok's Don Mueang International Airport on May 1,189

<sup>&</sup>lt;sup>189</sup> Pattaya Mail, May 4, 2020



<sup>&</sup>lt;sup>186</sup> The Jakarta Post, March 19, 2020

<sup>&</sup>lt;sup>187</sup> Scoot, July 17, 2020

<sup>&</sup>lt;sup>188</sup> Pattaya Mail, May 4, 2020

#### Thai VietJet

From May 1, Thai VietJet resumed domestic flights from Chiang Mai and Chiang Rai. 190

#### VietJet

VietJet suspended its Southeast Asian services from March 20, ceasing flights to Cambodia, Indonesia, Malaysia, Myanmar, Singapore and Thailand. It had previously suspended its flights to South Korea.

On April 16, VietJet was approved to resume daily services to Da Nang from Hanoi and Ho Chi Minh City, and between Hanoi and Ho Chi Minh City. It currently operates six daily flights on the Hanoi-Ho Chi Minh City route.

# Other airlines

Airline	Action and plans
Bangkok Airways	All international and most domestic flights suspended until October. Service on Bangkok-Samui resumed May 15
Royal Brunei Airlines	Network scaled back to six routes until October 31
Thai Smile	All international flights suspended from March 23
Vietnam Airlines	Most international flights suspended. Comprehensive domestic operation offered during July and August. Da Nang service temporarily suspended

# Bangkok Airways

Full-service regional airline Bangkok Airways suspended all international passenger flights from March 29 until October 24. The airline has also suspended all domestic flights from April 7 until further notice. 191

From May 15, Bangkok Airways will resume domestic flights, starting with a twice-daily service from Bangkok Suvarnabhumi International Airport to Samui. 192 All other domestic services remain suspended until October 24, but some may resume earlier as conditions allow.

# Royal Brunei Airlines

Royal Brunei Airlines has been operating on a limited basis since March 23. Until October 31, the airline will conduct flights only to Kuala Lumpur, Singapore, Melbourne, Hangzhou, Hong Kong and Manila. It is operating these flights to retain vital connectivity and for essential passenger travel.

RB Link flights operated in partnership by Malindo Air to destinations in Borneo are suspended until November 30, 2020.

# Thai Smile

Since March 23, Thai Smile, the domestic and regional subsidiary of Thai Airways, has suspended its international operation, ending flights to Cambodia, Hong Kong, India, Laos, Malaysia and Taiwan.

<sup>&</sup>lt;sup>192</sup> Bangkok Airways, April 28, 2020



<sup>&</sup>lt;sup>190</sup> Pattaya Mail, May 4, 2020

<sup>&</sup>lt;sup>191</sup> Bangkok Airways, March 31, 2020

#### Vietnam Airlines

By March 24, Vietnam Airlines had suspendedall international flights. Until October 24, Vietnam Airlines will operate weekly flights on just three international routes: 193

- Hanoi-Seoul
- Ho Chi Minh City-Seoul
- Hanoi-Frankfurt

Having suspended them from March 30, Vietnam Airlines began to resume its domestic operation during May, offering 11 flights a day between Hanoi and Ho Chi Minh City and five daily services to Da Nang from both Hanoi and Ho Chi Minh City. 194

At the end of August, Vietnam Airlines offered a comprehensive domestic network comprising 12 routes from Hanoi, 11 from Ho Chi Minh City, three from Vinh, two from Hai Phong, two from Thanh Hoa, two from Hue and a single route from Da Lat. 195 Vietnam Airlines' domestic schedule includes high frequency services on some routes, with 16 flights per day offered from Hanoi to Ho Chi Minh City.

Because of a localized COVID-19 outbreak, Vietnam Airlines was forced to suspend all flights from Da Nang from July 29 until August 31. It also suspended a number of domestic routes to destinations including Tuy Hoa, Van Don, Ca Mau and Rach Gia.

To ensure the mandatory COVID-19 testing of all arrivals at Ho Chi Minh City's Tan Son Nhat International airport operates effectively, Vietnam Airlines has been restricted to carrying 180 passengers on the aircraft it's operating to the airport (Boeing 787-9 281 seats; Boeing 787-10 367 seats; Airbus A350-900 305 seats). 196

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# Australia

Airline	Action and plans
FlyPelican	Operating limitedservice on eight routes
Jetstar	All international flights cancelleduntil October 25
Qantas	All scheduled international flights suspended until at least the end of October 2020; possibly until July 2021. Domestic flying resumed during June
Regional Express	80% reduction in flights with most routes maintained. Revisedschedule from April 1
Tigerair Australia	Grounded from March 25
Virgin Australia	All international services and most domestic suspended untilmid-June. Airline has filed for administration. Building domestic schedule to 320 weekly flights by early July

<sup>&</sup>lt;sup>193</sup> Vietnam Airlines, June 26, 2020

<sup>&</sup>lt;sup>196</sup> Cirium, April 6, 2020



<sup>194</sup> Breaking Travel News, April 27, 2020

<sup>&</sup>lt;sup>195</sup> Vietnam Airlines, August 10, 2020

# **FlyPelican**

Newcastle-based regional airline FlyPelican suspended 90% of its flying until the end of May.

Up to July 19 (airline has yet to update its schedule beyond this date), FlyPelican was operating the following services:

- Newcastle-Ballina (3), Canberra (5 per week), Dubbo (4), Sydney (5)
- Sydney-Cobar (3), Mudgee (4), Taree (2)
- Canberra-Ballina (3)

# Jetstar

Due to ongoing border closures as a result of COVID-19, Jetstar has cancelled all international flights until October 25, 2020, including services between Australia and New Zealand. <sup>197</sup> As the situation is constantly and rapidly changing, the airline has yet to decide on its international services beyond this date.

#### **Qantas**

Once Australia's federal government recommended against all overseas travel, Qantas Group suspended all Qantas and Jetstar international flights from late March until at least the end of May. The group also cut domestic capacity by 60%. Both airlines further adjusted their schedules after the Australian government's March 22 announcement of a tightening of restrictions on domestic travel.

As social distancing measures and travel restrictions ease, Qantas and Jetstar increaseddomestic and regional flying in June and July, lifting capacity by 5-15% by the end of June. By the end of July, Qantas hoped to be operating 40% of its pre-COVID-19 capacity. There will be more flights between Melbourne and Sydney and from Canberra. Qantas also plans to restart eight other domestic routes and increase intra-state flights in Western Australia, Queensland, New South Wales and South Australia. The airline will gradually rebuild its domestic schedule until October 2020.<sup>198</sup>

Following an announcement by the Australian government that its borders will remain closed until 2021, Qantas suspended all scheduled international flights, including those between Australia and New Zealand, until at least the end of October 2020.<sup>199</sup> In August 2020, Qantas CEO Alan Joyce suggested that the airline might not resume international services until July 2021.<sup>200</sup>

#### **Regional Express**

Thanks to a regional airline financial assistance package unveiled by the Australian government, Regional Express (Rex), the country's largest independent regional carrier, pledged to maintain routes and jobs. It had been planning to shut down, but continued operations in almost its entire network of 59 destinations.<sup>201</sup> While it maintained its network, the airline still cut flights by around 80%.

As it rebuilds its operation, Regional Express has had to respond to increased services from QantasLink on competing routes, increasing its own services on five routes from Sydney (Albury, Ballina, Dubbo, Orange and Wagga Wagga), three from Adelaide (Kangaroo Island, Port Lincoln and Whyalla) and one

<sup>&</sup>lt;sup>201</sup> Cirium, March 30, 2020



<sup>&</sup>lt;sup>197</sup> <u>Jetstar</u>, August 13, 2020

<sup>&</sup>lt;sup>198</sup> Qantas, Australian domestic network changes

<sup>&</sup>lt;sup>199</sup> Qantas, International Network Changes, July 21, 2020

<sup>&</sup>lt;sup>200</sup> Business Travel News, August 20, 2020

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from Melbourne (Mildura) from July  $6.^{202}$  On the same date, Rex expanded its operations in Western Australia, doubling weekly return services from Perth to Albany and Esperance to eight, and increasing flights from Perth to Carnarvon and Money Mia from 3 to 5 per week.  $^{203}$ 

# Tigerair Australia

Tigerair Australia suspended all operations from March 25, as part of deeper capacity cuts by parent company Virgin Australia. The low-cost carrier attributed the decision to expanded travel restrictions imposed by federal and state governments and territories. The grounding affects key trunk routes including Melbourne to Brisbane, Gold Coast and Sydney, and Sydney to Brisbane and Gold Coast.

# Virgin Australia

The airline had planned to suspend all international flying and cut domestic capacity by 50%; both from March 30 until June 14. Following the escalation of state border controls within Australia, Virgin Australia was forced to suspend almost its entire domestic flying schedule from March 27. Timing for the resumption of both domestic and international services remains mid-June.

Virgin maintained service to 17 Australian destinations for essential services, critical freight and logistics.

The future of Virgin Australia is now uncertain after the carrier entered voluntary administration on April 21, having failed to secure a A\$1.4 billion (US\$890 million) bailout from the Australian government. The airline's biggest shareholder with a 25% stake, Etihad Airways, was unable to provide further funding while dealing with COVID-19's impact on its own business. Etihad, however, remains "open for constructive discussions on a potential relaunch of [Virgin Australia]."

As travel restrictions begin to ease, Virgin Australia will double its domestic capacity by early July, operating 320 flights per week.<sup>204</sup> There will be more connections and frequencies between Sydney, Brisbane, Melbourne and Perth. Virgin Australia will also resume services from Brisbane to Adelaide, Canberra and Perth, and from Perth to Sydney. It will also offer more flights on intrastate Queensland and Western Australia routes.

# **New Zealand**

Airline	Action and plans
Air New Zealand	Minimal international operations until August 31. Operating 70% of pre-pandemic domestic capacity
Jetstar	Operating 90% of domestic networkbetween August and October

# Air New Zealand

Air New Zealand's domestic routes are safeguarded by the New Zealand government, but the airline cut capacity by 30% in April and May. It continued service on just five domestic routes: Auckland-Christchurch, Auckland-Wellington, Wellington-Christchurch, Wellington-Nelson and Christchurch-

<sup>&</sup>lt;sup>204</sup> Virgin Australia, June 15, 2020



<sup>&</sup>lt;sup>202</sup> Regional Express, June 5, 2020

<sup>&</sup>lt;sup>203</sup> Regional Express, June 30, 2020

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Dunedin.<sup>205</sup> By June, Air New Zealand had ramped up its domestic network, offering flights from Auckland to 14 destinations, from Wellington to nine and from Christchurch to nine. <sup>206</sup> During July/August, it will serve 16 domestic destinations from Auckland, 12 from Wellington, and 12 from Christchurch. Under Alert Level 1, Air New Zealand is currently operating a reduced domestic schedule. <sup>207</sup> It had planned to operate 55% of scheduled domestic capacity in July and August, with more than 880 weekly return flights from Auckland, Christchurch and Wellington.

It subsequently increased its planned capacity for August to 70% of its pre-pandemic level. Top cope with increased demand, it is operating an extra 408 one-way flights from Auckland, Christchurch and Wellington to other domestic points.

On March 16, Air New Zealand announced an 85% cut in its long-haul network from March 30 until June 30. Route suspensions included Auckland to Chicago, San Francisco, Houston, Buenos Aires, Vancouver, Tokyo Narita, Honolulu, Denpasar and Taipei, as well as London-Los Angeles.

From Auckland, the airline will until October 24, 2020, operate flights to just six long-haul destinations: Hong Kong (3 per week), Los Angeles (7 pw), San Francisco (3 pw), Seoul (1 flight per 3 weeks), Shanghai (1 pw) and Tokyo Narita (1 pw).<sup>208</sup> It also operates one-way transit services linking Auckland and Christchurch with Singapore.

As it believed demand would be slow to recover, Air New Zealand permanently ended its Auckland-Buenos Aires and Los Angeles-London routes. It has also postponed the start of Auckland-New York services due on October 29, 2020, until late 2021.

Air New Zealand cut trans-Tasman capacity to Australia by 80% until the end of June. Through October 24, it plans to maintain flights from Auckland to Sydney (9 return services pw), Brisbane (4 pw) and Melbourne (7 one-way services per week). At the end of July, the airline suspended bookings to Australia until August 28, going beyond local government restrictions on travel in place until August 8. <sup>209</sup> Air New Zealand had previously decided to suspend its Auckland-Melbourne services for the first half of July, after the Australian government banned international arrivals.

Until the end of October, Air New Zealand will also maintain weekly flights from Auckland five Pacific Island destinations: Apia, Nadi, Niue, Rarotonga and Tonga. It will also operate two weekly services to Norfolk Island from both Brisbane and Sydney.

At present, the airline does not expect a return to long haul flying of any note until 2021. <sup>210</sup> Following a request from the New Zealand Government, Air New Zealand extended a block on new bookings for international flights into New Zealand until August 9.<sup>211</sup>

#### **Jetstar**

Qantas-owned low-cost carrier will resume about 90% of its domestic schedule from August through October. It will operate more than 100 return flights weekly across six domestic routes, flying from

<sup>&</sup>lt;sup>211</sup> Air New Zealand, International travel options, July 28, 2020



<sup>&</sup>lt;sup>205</sup> Air New Zealand, April 2, 2020

<sup>&</sup>lt;sup>206</sup> Air New Zealand, June 10, 2020

<sup>&</sup>lt;sup>207</sup> Air New Zealand</sup>, July 24, 2020

<sup>&</sup>lt;sup>208</sup> Air New Zealand, August 8, 2020

<sup>&</sup>lt;sup>209</sup> Cirium, July 29, 2020

<sup>&</sup>lt;sup>210</sup> Cirium, June 8, 2020

# **Research and Intelligence**

Auckland to Christchurch, Dunedin, Queenstown and Wellington, and from Wellington to Christchurch and Queenstown.

# Note

The COVID-19 situation is rapidly evolving, and the situation is changing on almost an hourly basis. The information presented in this report represents the latest view as at September 2, 2020. We have carefully researched and checked the information contained. However, we do not guarantee or warrant the correctness, completeness or topicality of this article and do not accept any liability for any damage or loss as a result of the use of the information contained within this article.

Do you have questions or comments regarding this report? Please email <a href="mike.eggleton@bcdtravel.co.uk">mike.eggleton@bcdtravel.co.uk</a> to share your thoughts.

