OCTOBER 2020

OAG

OAG FREQUENCY & CAPACITY STATISTICS

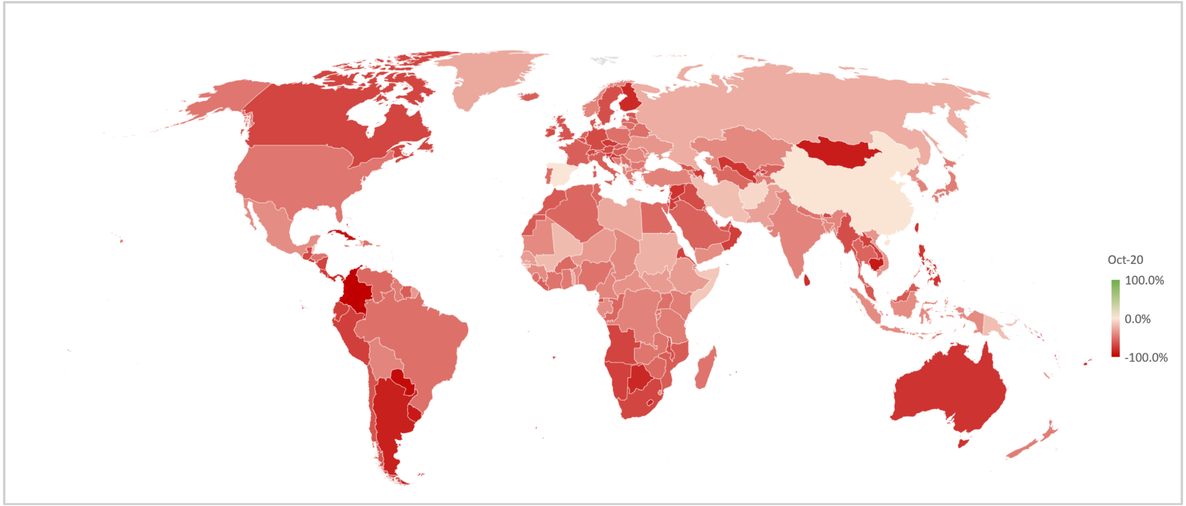
MAKE SMARTER MOVES

SEATS BY REGION

Region	Oct-20	Change v Oct-19	% Change	Change v Sep-20	% Change
Africa : Central/Western Africa	1,534,675	-44.3%		13.8%	
Africa : Eastern Africa	1,907,840	-43.4%		24.5%	
Africa : North Africa	2,127,142	-54.1%		-3.7%	
Africa : Southern Africa	1,118,650	-68.0%		61.9%	
Asia : Central Asia	801,705	-52.3%		-2.7%	
Asia : North East Asia	89,669,150	-16.6%		6.2%	
Asia : South Asia	12,790,394	-42.9%		31.5%	
Asia : South East Asia	19,996,097	-54.9%		12.6%	
Europe : Eastern/Central Europe	11,383,474	-40.9%		-11.7%	
Europe : Western Europe	43,142,643	-59.8%		-8.9%	
Latin America : Caribbean	1,664,725	-50.0%		20.5%	
Latin America : Central America	5,497,191	-45.0%		11.2%	
Latin America : Lower South America	6,762,741	-58.0%		27.2%	
Latin America : Upper South America	2,269,123	-69.8%		58.3%	
Middle East	7,210,645	-62.6%		0.0%	
North America	53,142,286	-50.0%		11.0%	
Southwest Pacific	3,832,074	-69.8%		19.6%	
Global	264,850,555	-46.2%		5.9%	

Source: Schedules Analyser

Seat Capacity October 2020 v 2019



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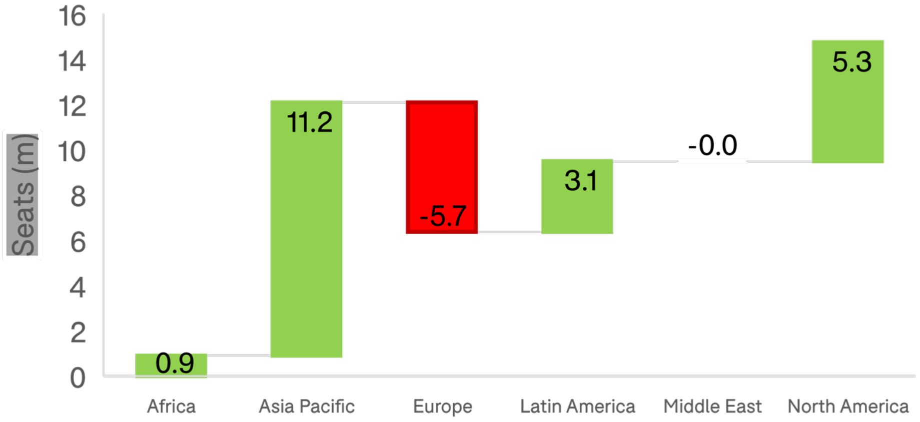
Seats (m) added/removed in each region in the last month



KEY POINTS

- Global capacity is slowly returning with the number of available seats in October now ‘only’ 46% below where they were in October 2019, which is an improvement of 5.9% on the position last month.
- Most regions have seen improvements from last month with the exception of North Africa, Central Asia and both Eastern/Central Europe and Western Europe. In Europe continued travel restrictions associated with a second spike in covid-19 cases is leading to lower demand for air travel.
- North East Asia, which includes China as well as Japan and South Korea, continue to lead the way in recovery: Capacity is now just 17% below where it was a year ago and 6.2% better than last month.
- At the other end of the spectrum, Southwest Pacific still only has slightly over 30% of the capacity operating that was available this time last year, and Southern Africa is not far behind, with only 32% of last years’ capacity.
- North America, the world’s second largest schedule aviation market after North East Asia, is currently operating 50% of the capacity of a year ago, although this is 11% more than a month ago.

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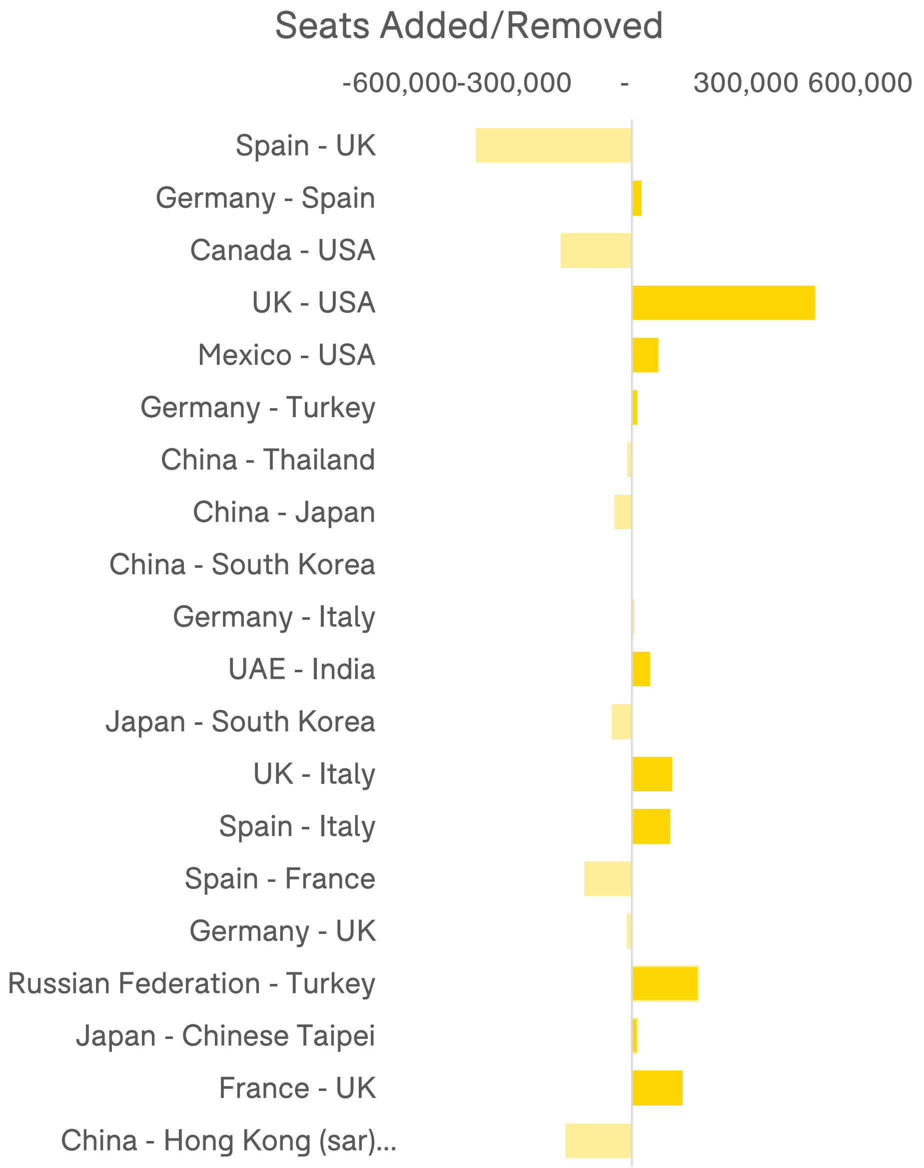
TOP TWENTY COUNTRY PAIRS

Country Pairs	Oct-20	Change v Oct-19	% Change	Change v Sep-20	% Change
Spain - UK	1,495,110	-67.3%		-21.5%	
Canada - USA	214,790	-93.4%		13.4%	
Germany - Spain	995,689	-69.1%		-15.8%	
Mexico - USA	1,867,011	-28.2%		34.7%	
UK - USA	434,324	-80.9%		19.1%	
China - Japan	230,517	-89.6%		6.9%	
Germany - Turkey	879,686	-60.0%		-1.4%	
China - Thailand	144,050	-93.4%		-24.6%	
China - South Korea	303,596	-85.4%		-0.7%	
Germany - Italy	566,520	-70.2%		1.3%	
UAE - India	569,412	-69.6%		9.2%	
UK - Italy	656,754	-60.0%		-7.5%	
Germany - UK	519,478	-67.7%		25.8%	
Japan - South Korea	439,720	-72.0%		29.7%	
Spain - Italy	396,051	-74.5%		-24.0%	
Spain - France	499,867	-67.1%		-2.6%	
Japan - Chinese Taipei	243,553	-83.5%		252.1%	
China - Hong Kong (sar) China	179,214	-87.3%		8.9%	
UK - Ireland	442,484	-68.7%		43.0%	
Russian Federation - Turkey	883,886	-33.7%		-16.4%	

Source: Schedules Analyser



KEY POINTS

- Of the Top 20 country pairs in October 2019, the largest was Spain-UK, but this market is still very affected by travel restrictions and only around a third of the number of seats that were available this time last year are now operating.
- The impact of international travel restrictions at one end of a route, or both, is clear with half the Top 20 Country pairs operating at less than 30% of seats they had a year ago.
- The two country pairs which appear to have recovered best in terms of capacity are Mexico-US and Russian Federation-Turkey, which are only around a third below where they were. Mexico-US has seen the number of seats available grow by 35% this month, compared to September 2020.
- Despite China's Golden Week national holiday taking place this month, there appears to be no positive effect on international travel flows to key markets with continuing restrictions on flight volumes to and from China.

TOP TWENTY AIRLINES

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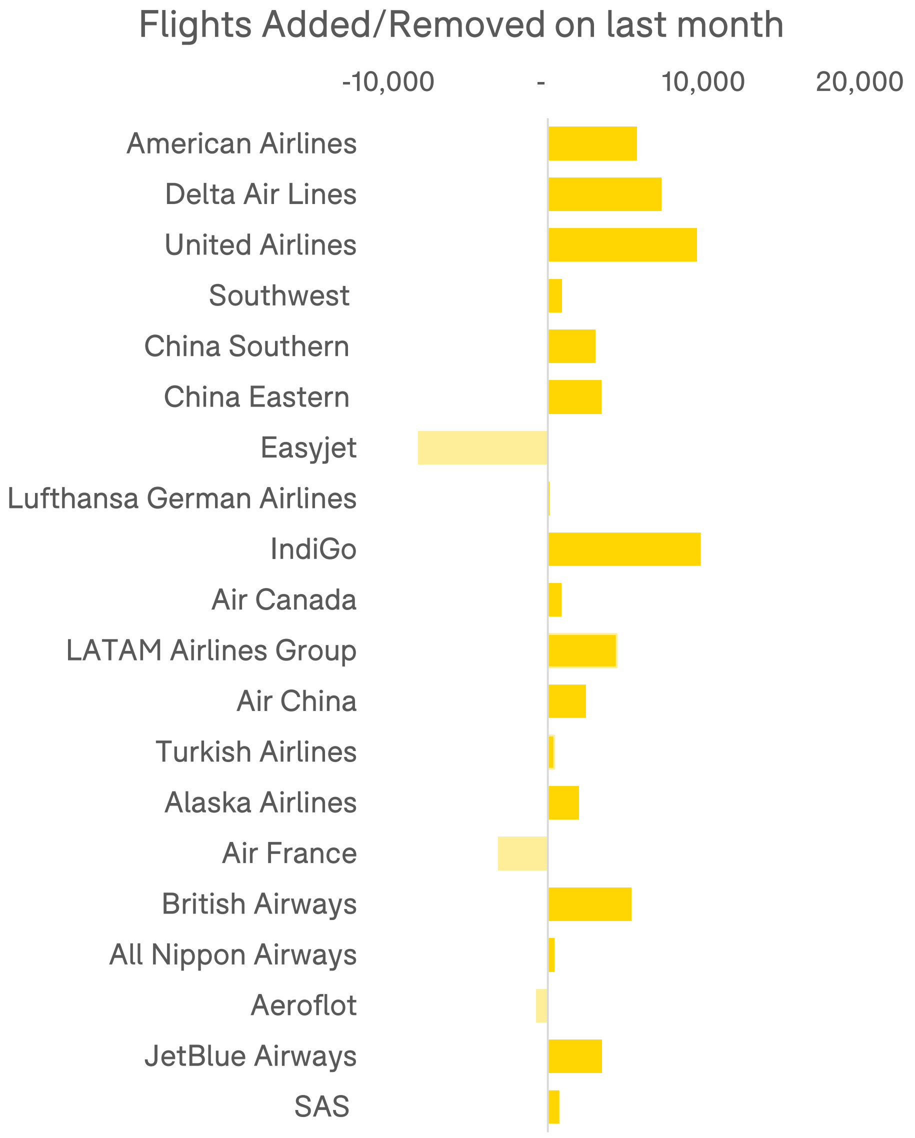
Airlines	Oct-20	Change v Oct-19	% Change	Change v Sep-20	% Change
American Airlines	100,036	-50.0%		6.0%	
Delta Air Lines	93,241	-43.9%		8.5%	
United Airlines	74,665	-51.7%		14.7%	
Southwest	64,951	-45.3%		1.4%	
China Southern	66,352	-3.1%		4.8%	
China Eastern	64,818	-5.2%		5.6%	
Easyjet	13,455	-75.6%		-38.2%	
Lufthansa German Airlines	15,337	-67.8%		0.7%	
IndiGo	31,010	-33.2%		46.3%	
Air Canada	11,361	-75.4%		8.2%	
LATAM Airlines Group	15,332	-65.1%		40.5%	
Air China	40,386	-3.0%		6.4%	
Turkish Airlines	19,489	-53.1%		2.2%	
Alaska Airlines	24,922	-37.3%		8.7%	
Air France	16,486	-51.7%		-16.2%	
British Airways	12,333	-61.3%		77.0%	
All Nippon Airways	25,279	-19.1%		1.8%	
Aeroflot	14,287	-53.4%		-5.0%	
JetBlue Airways	12,030	-60.4%		40.6%	
SAS	13,330	-51.8%		6.0%	

Source: Schedules Analyser

KEY POINTS

- Among the Top 20 airlines in October 2019, easyJet is noticeable for the reduction in capacity this month compared to last month. The airline announced in September it would be reducing its programme of flights for the next few months due to weaker than expected demand and a need to focus on 'profitable flying'.
- Although not as severe, Air France has also reduced capacity this month.
- Outside of China and, to a lesser extent, Japan, airlines continue to operate a fraction of the capacity that they did a year ago although capacity for most is slightly above last months' levels, in part due to October having 31 days, 1 day more than September.
- British Airways, IndiGo, LATAM Group and JetBlue have each added significantly more capacity this month than would be accounted for by the extra day. British Airways capacity rebound stands in contrast to easyJet's despite the overlap in market area; IndiGo benefits from the scale of the large domestic market and the relatively low death rate due to of covid-19; at LATAM despite borders beginning to open new capacity is mostly domestic.

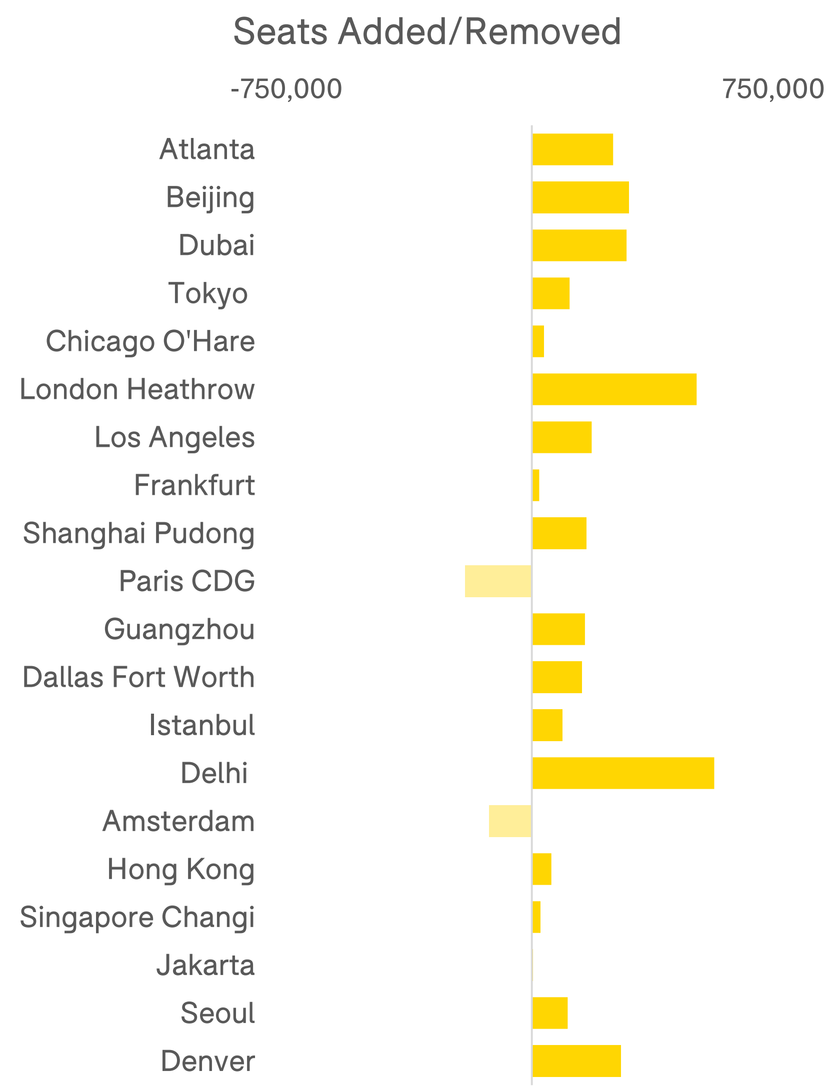


*Due to issues with the volatility of data, Ryanair has been excluded from the Top 20 this month

TOP TWENTY AIRPORTS

Airports	Oct-20	Change v Oct-19	% Change	Change v Sep-20	% Change
Atlanta	3,249,750	-40.1%		8.4%	
Beijing	3,125,799	-40.9%		10.7%	
Dubai	1,574,976	-66.3%		23.0%	
Tokyo	2,721,845	-41.4%		4.5%	
Chicago O'Hare	1,915,585	-56.7%		2.1%	
London Heathrow	1,862,741	-56.7%		37.8%	
Los Angeles	1,779,136	-58.4%		11.7%	
Frankfurt	1,306,723	-67.7%		1.8%	
Shanghai Pudong	2,825,864	-29.5%		6.4%	
Paris CDG	1,328,204	-66.0%		-13.4%	
Guangzhou	3,500,671	-8.9%		5.0%	
Dallas Fort Worth	2,444,839	-34.8%		6.8%	
Istanbul	1,514,632	-59.3%		6.8%	
Delhi	2,101,689	-43.2%		36.8%	
Amsterdam	1,590,838	-56.9%		-7.6%	
Hong Kong	499,370	-86.4%		14.0%	
Singapore Changi	314,084	-91.2%		9.4%	
Jakarta	2,002,962	-43.5%		0.2%	
Seoul	861,355	-75.7%		14.9%	
Denver	2,504,648	-29.2%		12.4%	

Source: Schedules Analyser

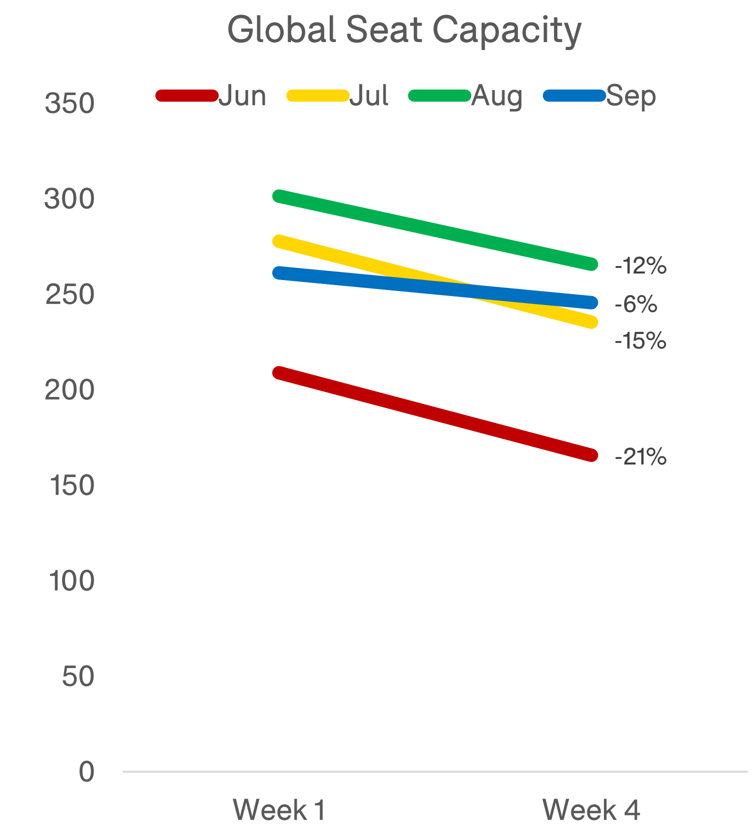


KEY POINTS

- Many of the airports which were among the Top 20 in the world a year ago would drop out of that list now. Hong Kong and Singapore continue to have very low levels of operations, while Dubai, which depended on international air travel, continues to operate well below last years' capacity.
- In China, which has seen significant recovery in capacity, two of the three major airports, and Beijing in particular, continue to be adversely affected, pointing towards recovery occurring predominantly at smaller airports.
- With many of the major airports dependent on the decisions of specific airlines, the month-over-month improvement in capacity at airports such as London Heathrow and Delhi may be attributed to British Airways and IndiGo.

COVID19 IMPACTS

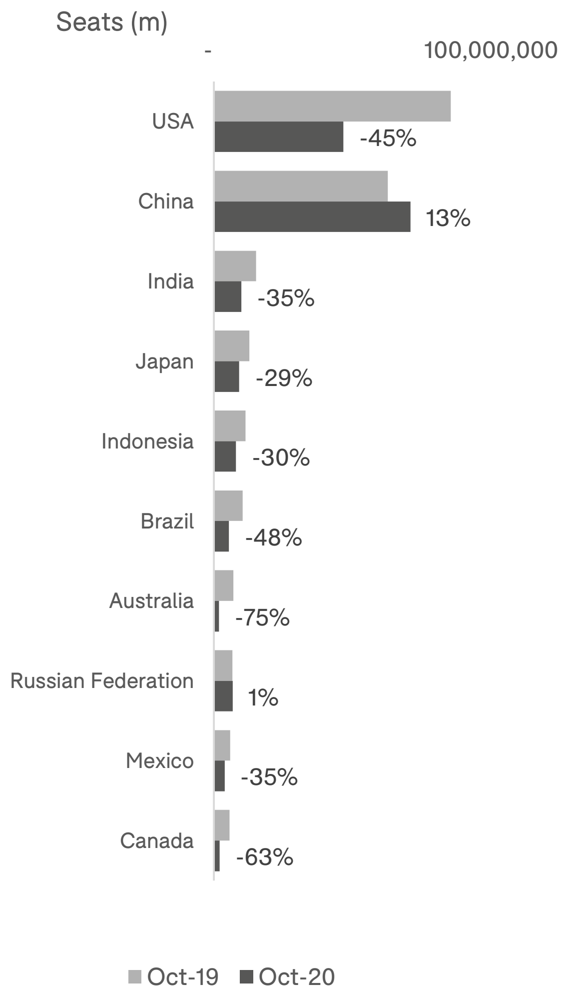
Each week in the month, capacity for the full month has been revised downwards as carriers adjusted capacity throughout the month.



Source: Schedules Analyser

KEY POINTS

- Looking at OAG's historical snapshot data for capacity over the last 4 months from what was filed at the beginning of the month v's the last week of the month highlights the continued variability in schedules data throughout the month as airlines continue to attempt to match capacity to demand in these uncertain times.
- This may be starting to level off however with September capacity shifting by 'only' -6% from week one to week 4, compared to August where the difference was -12%.
- The biggest domestic market in the world, the USA, has seen a slight shift this month from 48% behind last year last month to 45% below.
- China meanwhile, boosted by domestic tourism resulting from Golden Week, expects capacity to be 13% ahead of last year's level for this October.
- India has seen capacity added back this October in the domestic market, with the position moving from 50% below last year in September to 35% below this month.
- Brazil too has seen a move towards some recovery, going from -57% in September to -48% this month.
- There is little change for Australia, Canada and Japan.



FREQUENCY & CAPACITY STATISTICS DECODED

- All data is sourced from OAG Schedules and is for the current month and previous months. Change in capacity and frequency is then calculated in each category against the same month in the previous year. Data is unadjusted for the leap year effect.   We have removed our comparison for the rolling 12 months temporarily.

- There are four categories as defined below:
  1. **Seats by Region** is seat capacity for the current month to, from and within each global sub region.
  2. **Top 20 Country Pairs** are those international country pairs with most seat capacity based on the equivalent month last year.
  3. **Top 20 Airlines** are the 20 largest global airlines by flights based on the equivalent month last year.
  4. **Top 20 Airports** are the 20 largest airports by capacity based on the equivalent month last year.
  5. This month we include comparison in each of the above categories against the previous month, to highlight where frequency and capacity may be starting to recover.
  6. Data for October 2020 is based on OAG Schedules data as of 5th October 2020

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