NOVEMBER 2020

OAG FREQUENCY & CAPACITY STATISTICS

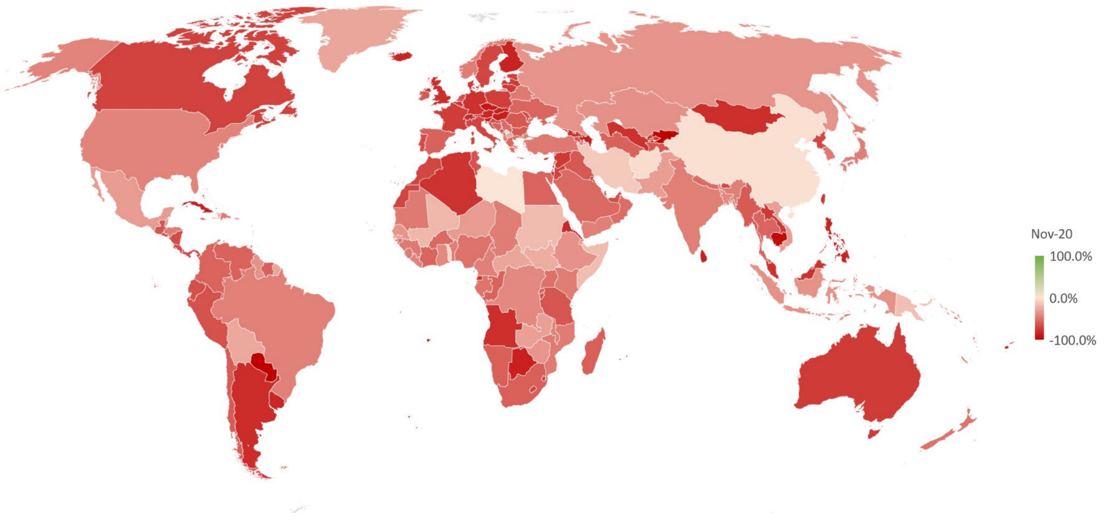
MAKE SMARTER MOVES

SEATS BY REGION

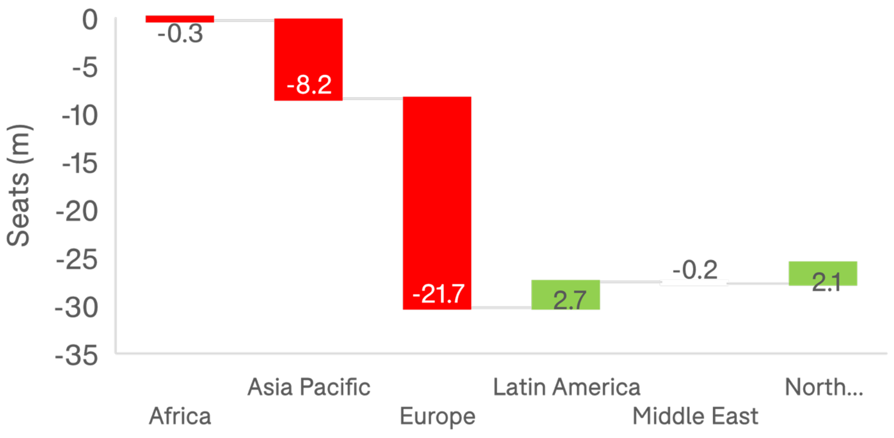
Region	Nov-20	Change v Nov-19	% Change	Change v Oct-20	% Change
Africa : Central/Western Africa	1,485,560	-47.3%		-3.2%	
Africa : Eastern Africa	1,777,881	-45.5%		-6.8%	
Africa : North Africa	1,674,088	-61.6%		-21.3%	
Africa : Southern Africa	1,444,693	-57.1%		29.1%	
Asia : Central Asia	738,776	-52.0%		-7.8%	
Asia : North East Asia	82,747,226	-19.0%		-7.7%	
Asia : South Asia	12,252,196	-44.9%		-4.2%	
Asia : South East Asia	19,244,991	-56.6%		-3.8%	
Europe : Eastern/Central Europe	7,481,173	-54.6%		-34.3%	
Europe : Western Europe	25,299,547	-70.4%		-41.4%	
Latin America : Caribbean	1,855,458	-50.0%		11.5%	
Latin America : Central America	6,299,433	-38.2%		14.6%	
Latin America : Lower South America	7,579,361	-51.5%		12.1%	
Latin America : Upper South America	3,132,606	-56.7%		38.1%	
Middle East	7,046,976	-62.1%		-2.3%	
North America	55,220,152	-44.8%		3.9%	
Southwest Pacific	3,943,896	-67.5%		2.9%	
Global	239,224,013	-47.3%		-9.7%	

Source: Schedules Analyser

Seat Capacity November 2020 v 2019



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



KEY POINTS

- As much of Western Europe moves into a second lockdown, the impact on capacity is evident. A significant reduction in capacity has seen carriers taking 17.8m seats out between October and November 2020. This has had the effect of reducing Western European capacity back down to 70% below last November. Eastern Europe has also seen capacity fall month on month, with 4m fewer seats this month.
- Across Asia Pacific, 8.2m seats have been taken out between October and November, reflecting partly the shorter planning horizons airlines are working to and lagging demand. The bulk of these reductions are in North East Asia, where reductions in capacity in China's domestic market account for 5m seats. South East Asia has also seen 0.75m seats taken out between this month and last month as restrictions on international travel continue.
- A different story is taking place in the Americas, most likely reflecting the different lifecycle of the spread of the virus. Across Latin America countries are starting to cautiously reopen to travel with the greatest increases taking place in Upper South America – Colombia, Peru, Ecuador.
- North America too is more optimistic this month, with carriers increasing capacity overall by 3.9%, perhaps as travellers prepare for Thanksgiving reunions later this month.

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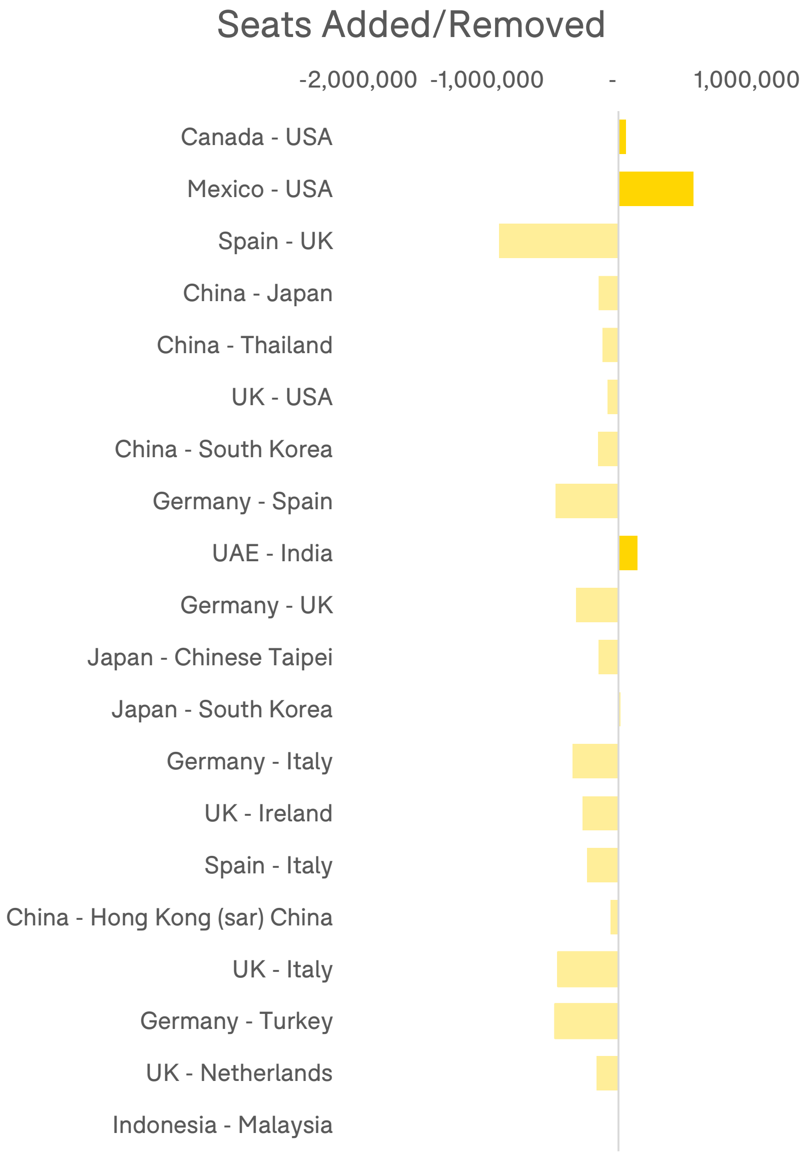
TOP TWENTY COUNTRY PAIRS

Country Pairs	Nov-20	Change v Nov-19	% Change	Change v Oct-20	% Change
Canada - USA	271,210	-91.2%		26.3%	
Mexico - USA	2,448,735	-15.5%		31.2%	
Spain - UK	566,598	-79.3%		-62.1%	
China - Japan	75,880	-96.9%		-67.1%	
China - Thailand	19,743	-99.1%		-86.3%	
UK - USA	351,264	-82.0%		-19.1%	
China - South Korea	143,650	-92.6%		-52.7%	
Germany - Spain	508,607	-72.4%		-48.9%	
UAE - India	716,191	-60.6%		25.8%	
Germany - UK	189,722	-86.6%		-63.5%	
Japan - Chinese Taipei	90,104	-93.6%		-63.0%	
Japan - South Korea	450,398	-67.3%		2.4%	
Germany - Italy	210,128	-84.1%		-62.9%	
UK - Ireland	162,670	-87.4%		-63.2%	
Spain - Italy	155,338	-87.9%		-60.8%	
China - Hong Kong (sar) China	117,362	-90.5%		-34.5%	
UK - Italy	185,233	-84.1%		-71.8%	
Germany - Turkey	385,689	-66.5%		-56.2%	
UK - Netherlands	158,095	-85.9%		-51.9%	
Indonesia - Malaysia	67,711	-93.9%		-5.1%	

Source: Schedules Analyser



KEY POINTS

- The impact of the European travel restrictions is particularly evident here, with markets to and from the UK showing considerable reductions as no international travel other than for essential reasons is permitted until December. Spain-UK capacity is down by 62% between October and November 2020, or just under 1m seats, whilst capacity between the UK and Germany and Italy is down by 0.3m and 0.5m seats, respectively.
- Again, in North America there is some optimism with capacity increases between the USA and it's closest neighbours. Although in percentage terms the change v's October is similar, the volumes are very different. Canada-USA is still pretty small, with 56,000 seats added and the overall market still just 9% of last year's levels, whilst Mexico-USA has seen nearly 600,000 seats added as the need for winter sun sets in across North America.
- The only other change of note is between the UAE-India where carriers have added 150,000 seats this month, perhaps in anticipation of migrant workers returning.

TOP TWENTY AIRLINES

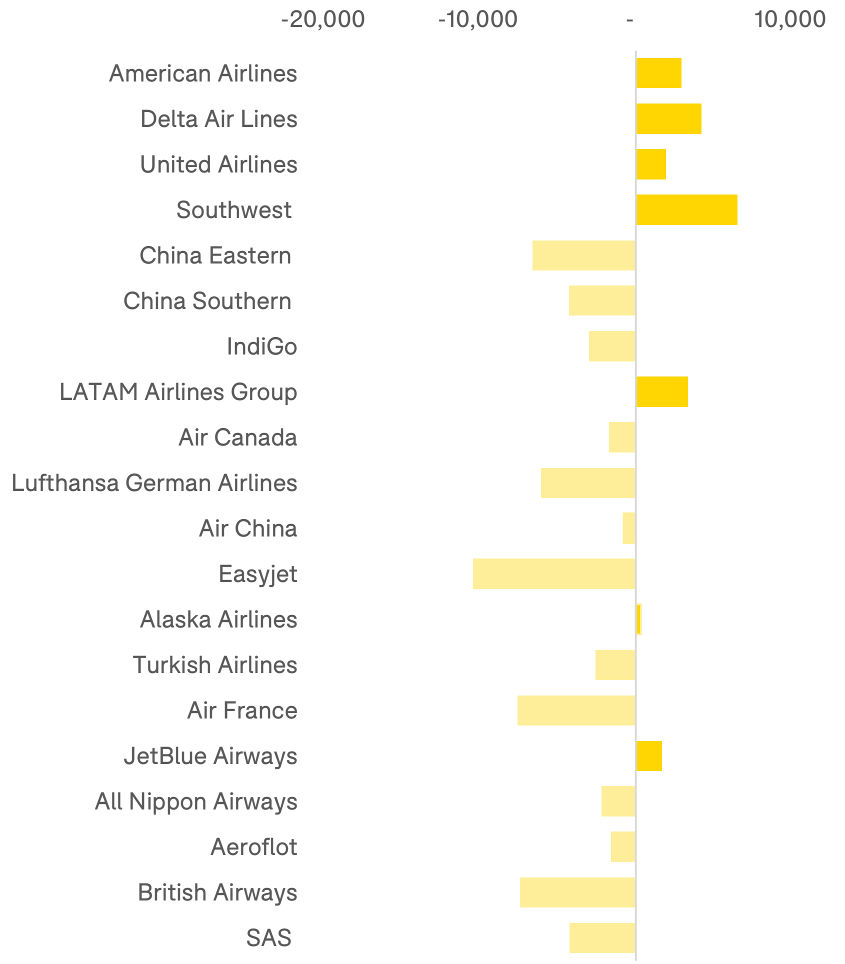
Airlines	Nov-20	Change v Nov-19	% Change	Change v Oct-20	% Change
American Airlines	102,996	-45.6%		3.0%	
Delta Air Lines	97,473	-36.2%		4.5%	
United Airlines	76,610	-47.8%		2.6%	
Southwest	71,534	-36.3%		10.1%	
China Eastern	58,178	-12.7%		-10.2%	
China Southern	62,046	-6.8%		-6.5%	
IndiGo	27,994	-39.0%		-9.7%	
LATAM Airlines Group	18,679	-57.3%		21.8%	
Air Canada	9,638	-77.3%		-15.2%	
Lufthansa German Airlines	9,236	-78.2%		-39.8%	
Air China	39,609	-3.8%		-1.9%	
Easyjet	2,977	-92.4%		-77.9%	
Alaska Airlines	25,253	-33.8%		1.3%	
Turkish Airlines	16,897	-54.5%		-13.3%	
Air France	8,871	-71.8%		-46.2%	
JetBlue Airways	13,718	-54.7%		14.0%	
All Nippon Airways	23,075	-23.3%		-8.7%	
Aeroflot	12,680	-55.3%		-11.2%	
British Airways	4,892	-82.7%		-60.3%	
SAS	9,064	-63.3%		-32.0%	

Source: Schedules Analyser

KEY POINTS

- The biggest reductions this month come from European carriers: easyJet is now back down to just 8% of November 2019 capacity levels; British Airways is down to less than 20% of last year's levels; and Lufthansa is down to just 22% of last year's capacity. Air France has taken capacity back to just under 30% of last November. Each of these carriers has made significant reductions in the last month, totalling 32,000 fewer flights this month than were scheduled for last month. The ripple effect of this on airline staff, airport operators and associated companies in their respective supply chains is substantial.
- As seen in previous slides looking at where growth is occurring, it's not a surprise to see the LATAM Group reporting frequency will increase this month on last month, taking the year-on-year position up to 57%, whilst the US big carriers all record frequency growth this month. Delta is faring best in terms of year on year comparisons, with November flights just 36% below last November.

Flights Added/Removed on last month

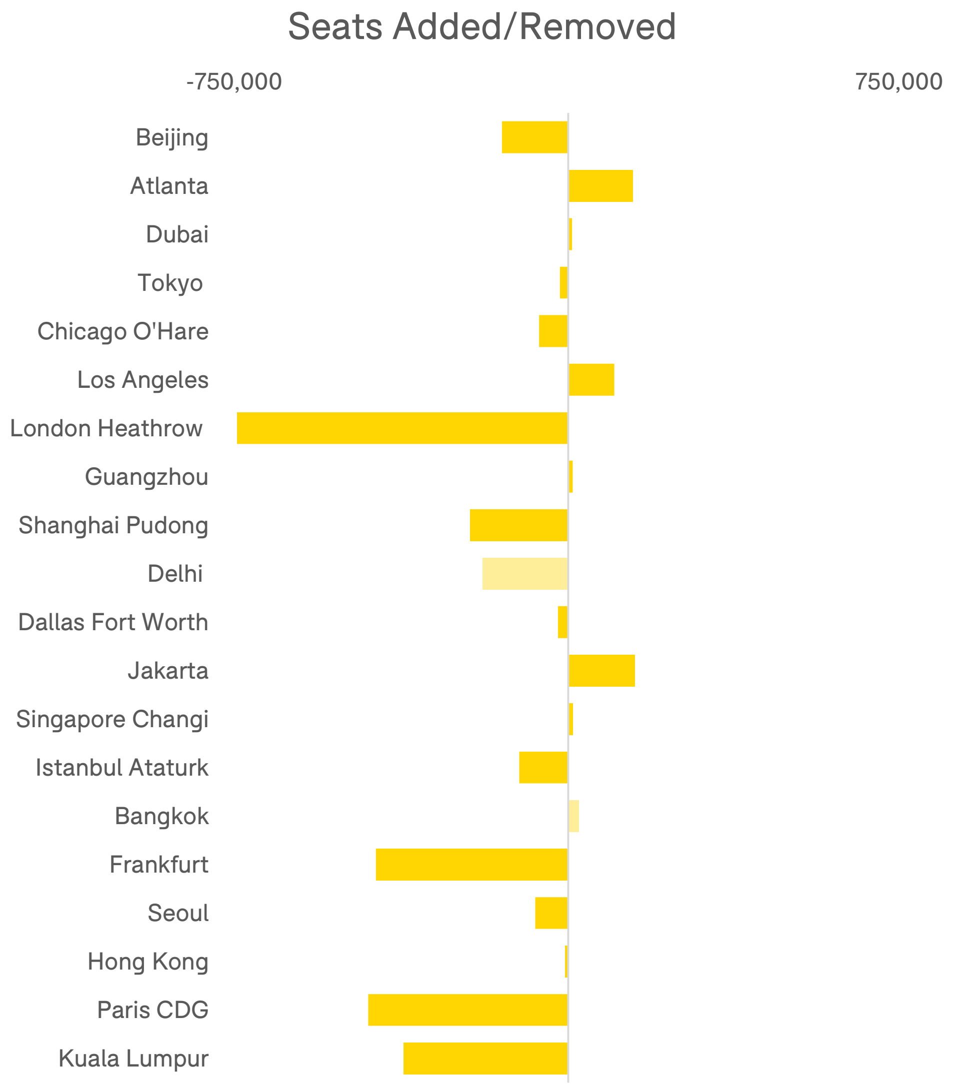


*Due to issues with the volatility of data, Ryanair has been excluded from the Top 20 this month

TOP TWENTY AIRPORTS

Airports	Nov-20	Change v Nov-19	% Change	Change v Oct-20	% Change
Beijing	2,975,430	-42.0%		-4.8%	
Atlanta	3,395,628	-32.6%		4.5%	
Dubai	1,583,387	-65.1%		0.5%	
Tokyo	2,702,593	-40.2%		-0.7%	
Chicago O'Hare	1,849,465	-54.2%		-3.5%	
Los Angeles	1,883,228	-53.2%		5.9%	
London Heathrow	1,095,087	-72.6%		-41.2%	
Guangzhou	3,510,270	-8.0%		0.3%	
Shanghai Pudong	2,602,885	-30.6%		-7.9%	
Delhi	1,908,323	-47.7%		-9.2%	
Dallas Fort Worth	2,421,465	-31.9%		-1.0%	
Jakarta	2,153,499	-39.2%		7.5%	
Singapore Changi	324,535	-90.8%		3.3%	
Istanbul Ataturk	1,403,529	-59.1%		-7.3%	
Bangkok	979,860	-71.4%		2.4%	
Frankfurt	871,131	-74.5%		-33.3%	
Seoul	786,676	-76.9%		-8.7%	
Hong Kong	492,053	-85.5%		-1.5%	
Paris CDG	874,899	-74.2%		-34.1%	
Kuala Lumpur	472,070	-85.7%		-44.2%	

Source: Schedules Analyser

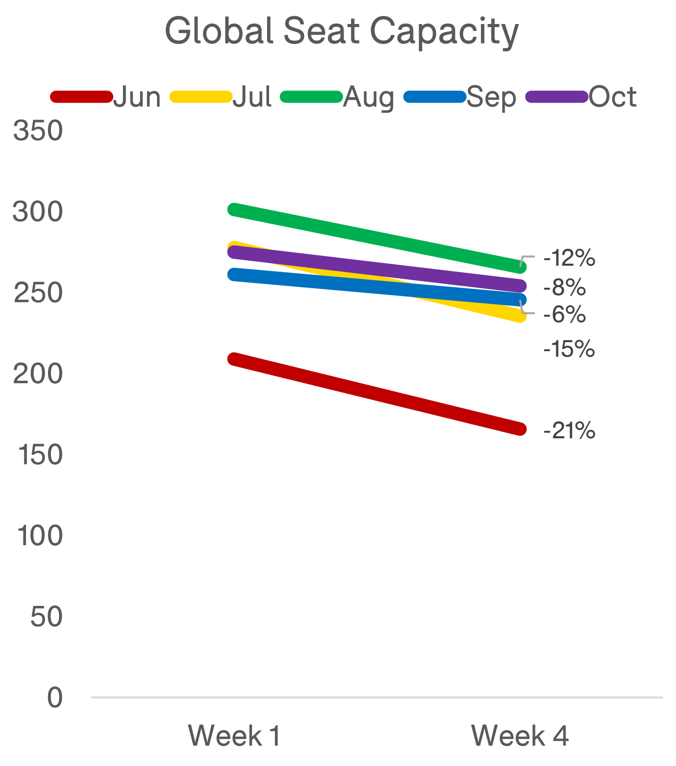


KEY POINTS

- The largest hub in November 2019 was Beijing PEK, which is currently sitting at 42% below last November's capacity level. It is not the biggest this November, however, as Guangzhou has overtaken it, with 3.5m seats. Guangzhou has recovered faster as it has a much higher proportion of domestic capacity than Beijing.
- Consistent with our earlier slides, the impact of the European lockdowns is evident across the big European hubs with London Heathrow down 41% compared to last month, Frankfurt by 33% and Paris CDG by 34%.
- Heathrow has seen nearly 768,000 seats removed between October and November, taking the hub back down to 73% below November 2019 levels.
- The only hub airports reporting any capacity increase this month are Atlanta, Los Angeles, Jakarta, Singapore and Bangkok.

COVID19 IMPACTS

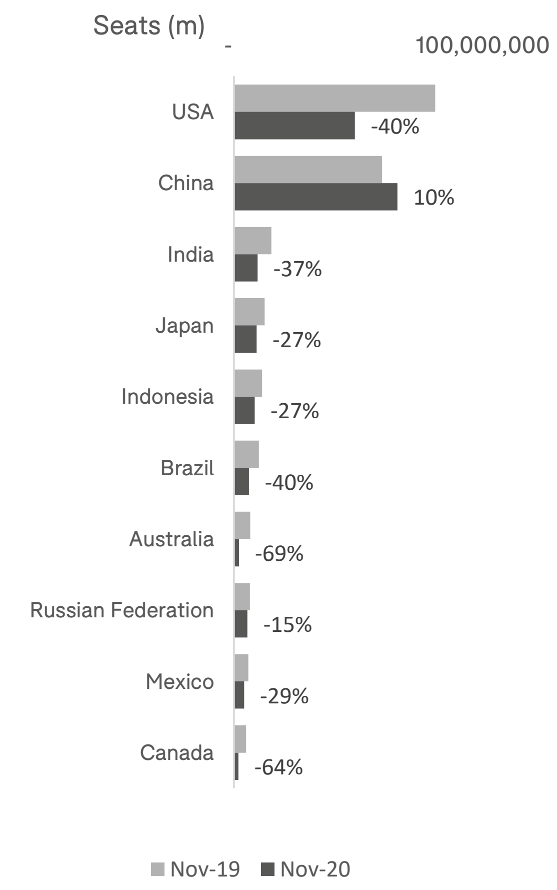
Each week in the month, capacity for the full month has been revised downwards as carriers adjusted capacity throughout the month.



Source: Schedules Analyser

KEY POINTS

- We continue to track capacity each month during the month using OAG's historical snapshot capability. Whilst last month it appeared that schedule variability from the beginning of the month was starting to slow down – just 6% variation from week 1 in September to week 4 for September, in October this worsened again to -8%, reflecting the ongoing challenges for airlines trying to match capacity to demand.
- We expect the November position to be similar.
- The biggest domestic market in the world, the USA, continues its positive trend, moving to 40% behind last year this month, from 48% below in September, and 45% below in October.
- Brazil sees a similar shift this month, from -48% last month to -40% this month versus last November.
- China has seen its domestic market recover, but November is down on October. In October capacity was 13% higher than last year, this month it's 10%
- No other domestic markets have recovered to 2019 levels.



FREQUENCY & CAPACITY STATISTICS DECODED

OAG

- 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 November 2020 is based on OAG Schedules data as of 9th November 2020

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