

DECEMBER 2020

OAG®

# OAG FREQUENCY & CAPACITY STATISTICS

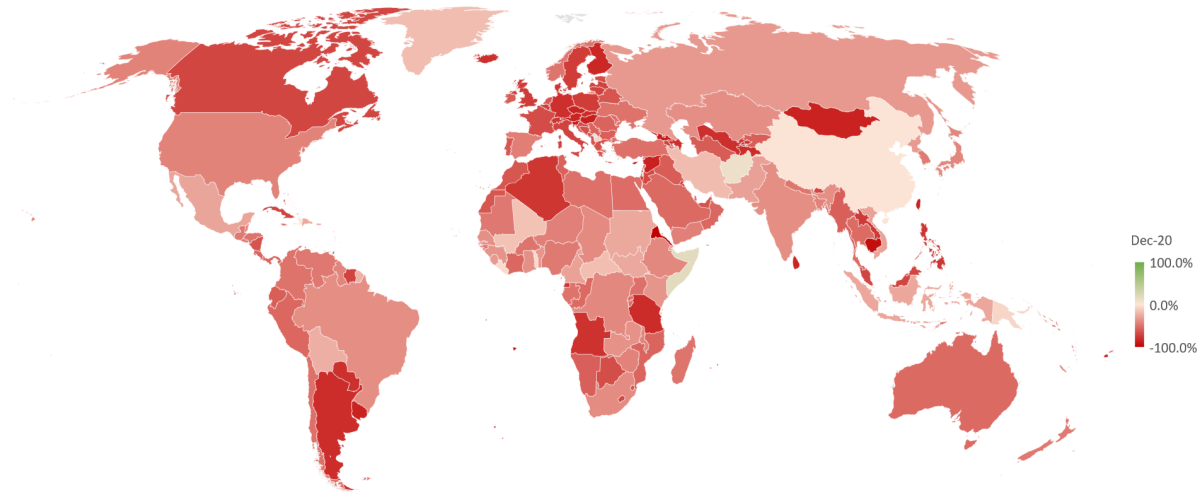
MAKE SMARTER MOVES

# SEATS BY REGION

Region	Dec-20	Change v Dec-19	% Change	Change v Nov-20	% Change
Africa : Central/Western Africa	1,729,885	-43.7%		16.4%	
Africa : Eastern Africa	2,033,949	-40.9%		14.4%	
Africa : North Africa	1,938,577	-58.8%		15.8%	
Africa : Southern Africa	2,031,070	-42.9%		40.6%	
Asia : Central Asia	726,558	-55.1%		-1.7%	
Asia : North East Asia	87,294,432	-17.6%		5.5%	
Asia : South Asia	13,927,507	-39.7%		13.7%	
Asia : South East Asia	23,155,914	-50.8%		20.3%	
Europe : Eastern/Central Europe	8,078,894	-52.9%		8.0%	
Europe : Western Europe	26,738,219	-69.2%		5.7%	
Latin America : Caribbean	2,547,655	-41.7%		37.3%	
Latin America : Central America	7,350,722	-33.3%		16.7%	
Latin America : Lower South America	9,084,790	-46.2%		19.9%	
Latin America : Upper South America	3,896,625	-49.8%		24.4%	
Middle East	7,826,029	-60.6%		11.1%	
North America	57,466,501	-45.0%		4.1%	
Southwest Pacific	6,150,338	-52.1%		55.9%	
Global	261,977,665	-44.7%		9.5%	

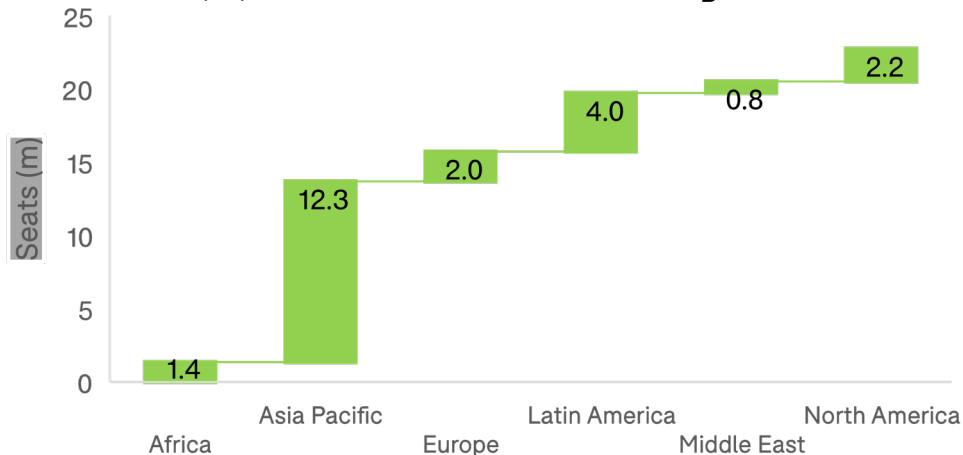
Source: Schedules Analyser

Seat Capacity December 2020 v 2019



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



## KEY POINTS

- Globally, schedules data for December points to capacity being 44.7% down in December, compared to 2019. Compared to last month, capacity is expected to improve by 9.5%.
- Based on this week's schedule for the full month of December, every region will see seats added this month. We know however that schedule changes continue to take place throughout the month (see page 4), and last month the variance between week 1 of November and week 4 of November for total month capacity was -5%. Consequently we can expect this number to reduce throughout the month.
- Pockets of strong month on month growth are currently the Southwest Pacific region, Southern Africa and the Caribbean. This is being driven by capacity increases in the domestic markets in Australia, which has seen 2m seats added this month as restrictions on internal travel are lifted. Domestic capacity within Australia is scheduled to be 4m in December, which is still below the 6.7m operated in December 2019. South Africa too is anticipating some recovery in the domestic market, with carriers increasing capacity by 80% this month compared to last month.

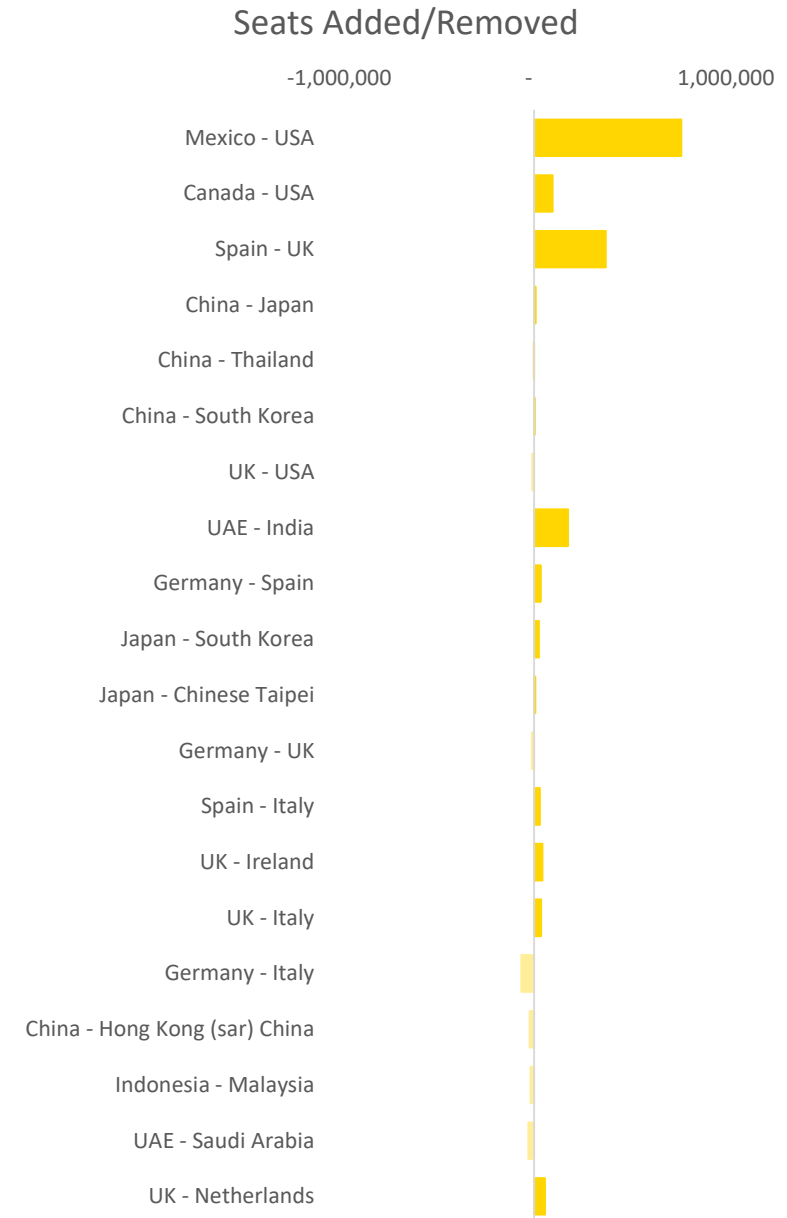
# TOP TWENTY COUNTRY PAIRS

Country Pairs	Dec-20	Change v Dec-19	% Change	Change v Nov-20	% Change
Mexico - USA	3,215,177	-7.6%		31.3%	
Canada - USA	368,238	-88.7%		35.8%	
Spain - UK	940,901	-66.1%		66.1%	
China - Japan	83,513	-96.8%		10.1%	
China - Thailand	18,915	-99.1%		-4.2%	
China - South Korea	146,904	-92.7%		2.3%	
UK - USA	341,379	-82.8%		-2.8%	
UAE - India	893,776	-54.0%		24.8%	
Germany - Spain	543,608	-69.5%		6.9%	
Japan - South Korea	474,731	-69.3%		5.4%	
Japan - Chinese Taipei	97,356	-93.4%		8.0%	
Germany - UK	178,103	-87.8%		-6.1%	
Spain - Italy	185,604	-86.4%		19.5%	
UK - Ireland	206,490	-84.4%		26.9%	
UK - Italy	222,040	-82.6%		19.9%	
Germany - Italy	143,646	-88.6%		-31.6%	
China - Hong Kong (sar) China	94,314	-92.4%		-19.6%	
Indonesia - Malaysia	50,230	-95.7%		-25.8%	
UAE - Saudi Arabia	143,334	-87.5%		-16.9%	
UK - Netherlands	214,636	-81.0%		35.8%	

## KEY POINTS

- With the ending of a national lockdown in England, key UK markets such as Spain, Ireland, Italy and the Netherlands will see capacity boosted this month. Capacity in these country pairs is still a long way below 2019 levels however, meaning recovery still has a considerable way to go.
- Scheduled capacity between Mexico-USA, currently the largest country pair, is moving closer to recovery however, with seats for December just 7.6% below last year. Carriers have increased capacity by just under one third since November, in anticipation of December vacation travellers. The spread of a second wave of COVID throughout the USA may yet impact this, with much of the state of California implementing a stay at home order through Christmas.
- There is a small increase in capacity planned for China-Japan as both countries gear up for re-opening to business travellers between the two countries.
- The UAE-India is also seeing some capacity growth this month with carriers increasing seats by almost 25% on last month, continuing the transport of migrant workers back to the UAE.

Source: Schedules Analyser



# TOP TWENTY AIRLINES

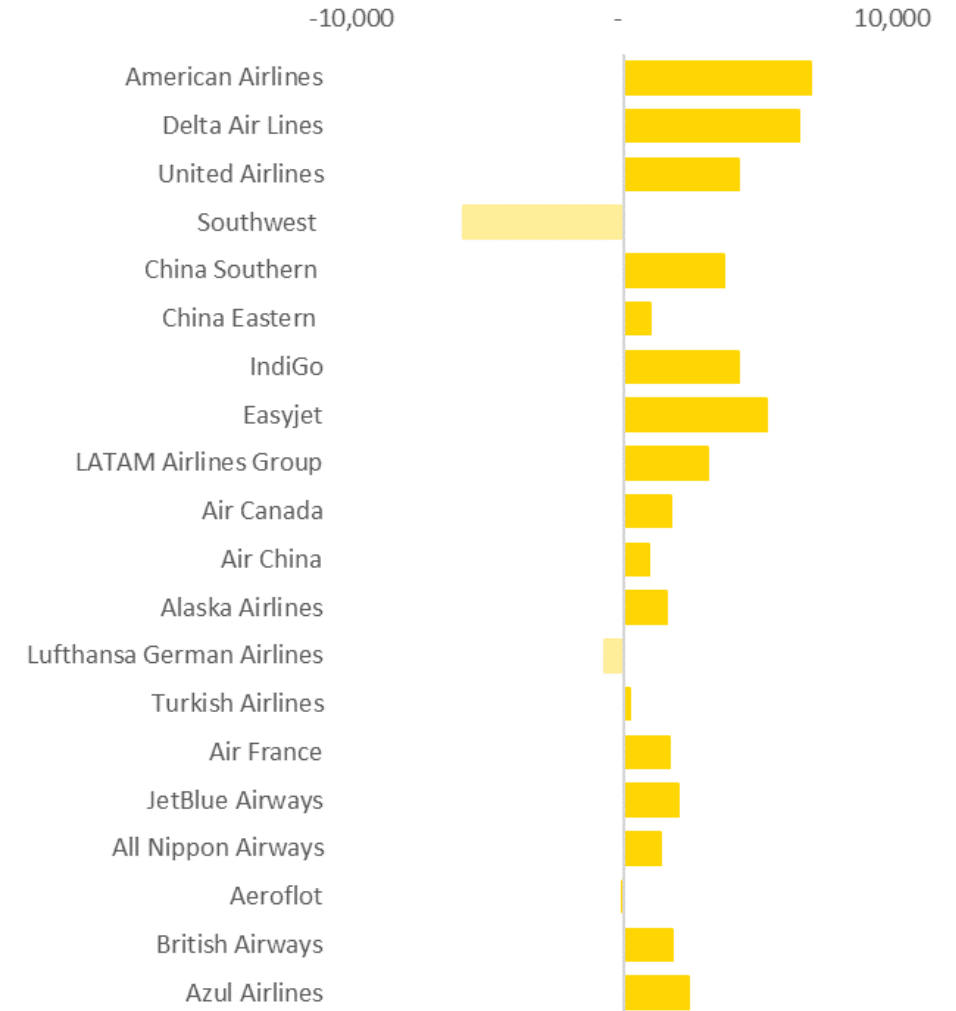
Airlines	Dec-20	Change v Dec-19	% Change	Change v Nov-20	% Change
American Airlines	109,936	-44.3%		6.7%	
Delta Air Lines	103,986	-34.9%		6.7%	
United Airlines	80,904	-47.1%		5.6%	
Southwest	65,584	-44.3%		-8.3%	
China Southern	65,742	-3.9%		6.0%	
China Eastern	59,166	-11.8%		1.7%	
IndiGo	32,282	-32.4%		15.3%	
Easyjet	8,277	-82.1%		178.0%	
LATAM Airlines Group	21,789	-52.1%		16.6%	
Air Canada	11,384	-74.7%		18.1%	
Air China	40,560	-5.0%		2.4%	
Alaska Airlines	26,826	-33.2%		6.2%	
Lufthansa German Airlines	8,549	-77.9%		-7.4%	
Turkish Airlines	17,105	-53.8%		1.2%	
Air France	10,595	-66.8%		19.4%	
JetBlue Airways	15,719	-50.2%		14.6%	
All Nippon Airways	24,456	-18.9%		6.0%	
Aeroflot	12,661	-56.9%		-0.1%	
British Airways	6,678	-76.5%		36.5%	
Azul Airlines	19,393	-24.2%		14.1%	

## KEY POINTS

Source: Schedules Analyser

- The world's biggest airlines report little change this month compared to last month, with one or two exceptions. Both easyJet and British Airways are adding frequency – easyJet a significant amount – in a bid to recover some of the losses incurred after another month of UK and Europe wide lockdowns. Western Europe's biggest carriers range from flights being between 65-82% below last year's levels.
- Two of China's big three carriers are almost back at 2019 flight levels, sitting just 3.9% (China Southern) and 5% below last December's frequency. China Eastern is not far behind, with flights at 11.8% below December 2019.
- In North America, the US majors will add some flights this month, but less than 10% apiece, with Southwest pulling back by 8.3% after a perhaps overly ambitious November.
- The LATAM Airlines Group and Azul anticipate some frequency growth this month, reflecting the relaxation of strict border controls across some parts of Latin America.

## Flights Added/Removed on last month



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

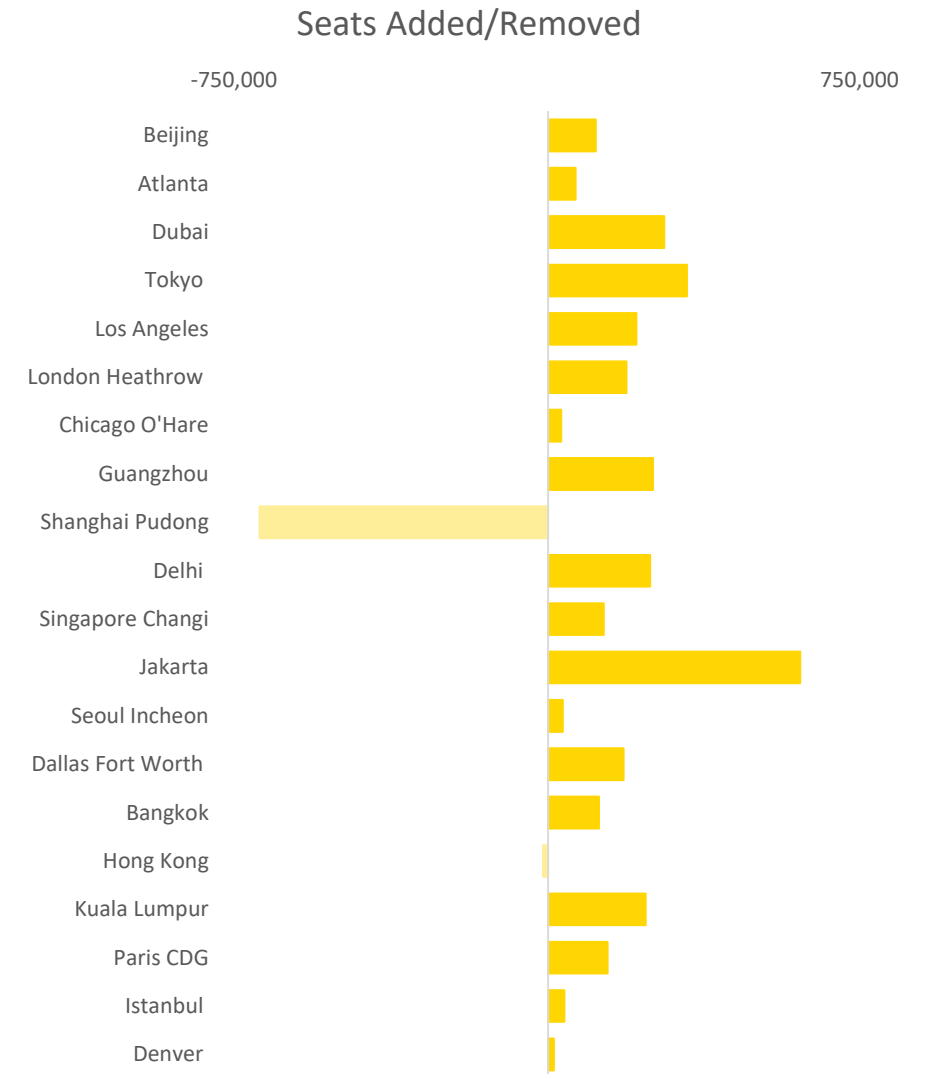
# TOP TWENTY AIRPORTS

Airports	Dec-20	Change v Dec-19	% Change	Change v Nov-20	% Change
Beijing	3,090,706	-41.0%		3.9%	
Atlanta	3,462,159	-32.3%		2.0%	
Dubai	1,863,247	-60.9%		17.7%	
Tokyo	3,037,333	-34.6%		12.4%	
Los Angeles	2,095,893	-51.2%		11.3%	
London Heathrow	1,284,290	-68.7%		17.3%	
Chicago O'Hare	1,881,397	-53.5%		1.7%	
Guangzhou	3,763,035	-4.8%		7.2%	
Shanghai Pudong	1,908,249	-50.8%		-26.7%	
Delhi	2,154,087	-42.8%		12.9%	
Singapore Changi	458,967	-87.8%		41.4%	
Jakarta	2,760,645	-26.3%		28.2%	
Seoul Incheon	822,071	-77.8%		4.5%	
Dallas Fort Worth	2,603,720	-28.3%		7.5%	
Bangkok	1,102,524	-69.6%		12.5%	
Hong Kong	480,163	-86.7%		-2.4%	
Kuala Lumpur	707,450	-80.1%		49.9%	
Paris CDG	1,018,697	-71.2%		16.4%	
Istanbul	1,443,305	-57.4%		2.8%	
Denver	2,512,250	-23.5%		0.6%	

Source: Schedules Analyser

## KEY POINTS

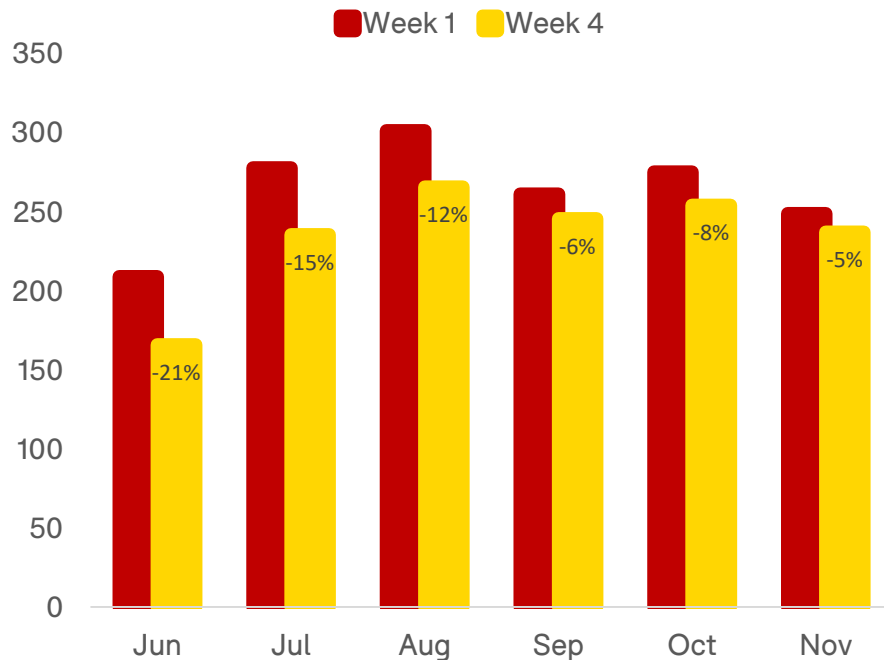
- Guangzhou is currently the largest airport in the world in capacity terms with 3.7m scheduled seats in December 2020, just 4.8% below December 2019. Atlanta, formerly the largest airport in the world, sits second with 3.5m seats, although this is still almost one third below December 2019 capacity levels. Tokyo's Haneda airport is also a third smaller than last December but will see capacity grow by 12.4% this month compared to last month.
- Optimism abounds in both Singapore and Kuala Lumpur with both airports recording over 40% more seats this month v's last month, but this seems likely to be revised downwards as the month progresses as both airports are still impacted by stringent limits on international travel.
- Shanghai Pudong has seen capacity fall back this month, perhaps after a small outbreak of COVID cases at the airport last month.



# COVID19 IMPACTS

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

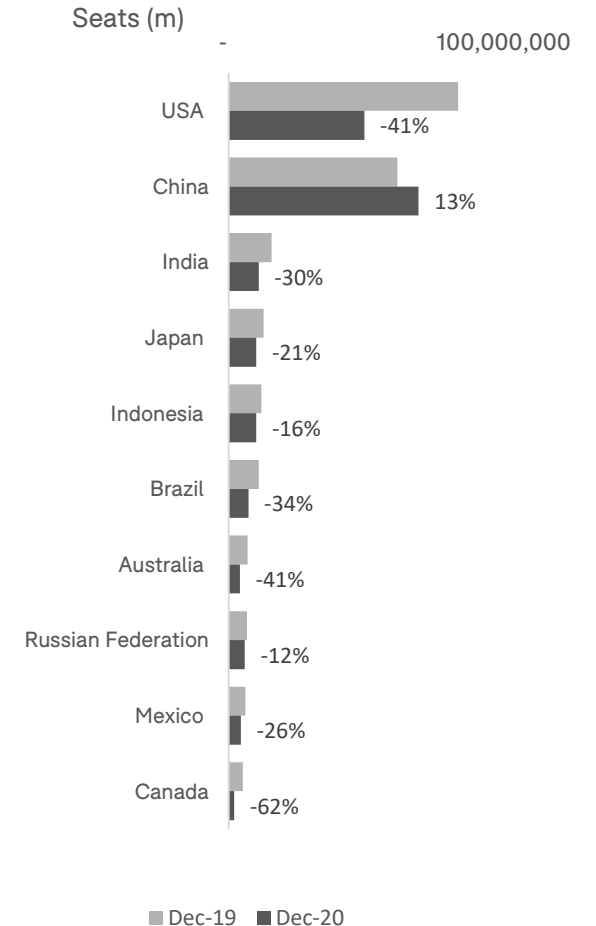
Global Seat Capacity by Month



## KEY POINTS

- The trend of capacity reductions through the weeks of each month continues, although has slowed with November seeing capacity fall by 5% between week 1 and week 4 of the month. Through the month of December, scheduled capacity is currently expected to grow from 55m seats in week 1 to 66m seats by week 4, which seems unlikely, making a full month global capacity level of 262m also unlikely.
- Domestic markets continue to prove more resilient with Chinese capacity anticipating growth of 13% in December 2020 above December 2019 levels.
- The only other large domestic market near to recovery is the Russian Federation which is 12% below last year.
- Just outside the Top 10 biggest domestic markets is Vietnam, which was 12<sup>th</sup> largest in 2019, is sitting at 1% above last December. Similarly, South Korea's domestic market has moved into growth, reporting 4% more seats this December.
- India is also showing signs of recovery, moving from 37% below last year in November, to 30% fewer seats this month.

Top 10 Biggest Domestic Markets  
Seats December 2020 v 2019



# 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 December 2020 is based on OAG Schedules data as of 7<sup>th</sup> December 2020

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