

CANSO ATM Traffic Analysis Report

6 November 2020

Increasing travel restrictions coupled with seasonal impact drive declines in global air traffic volumes in October

- There were 2.28 million flights operating globally in October 2020, a decline of 35% from the 3.52 million that flew in October 2019. Average daily flight levels trended slightly downward during the month, with an average of 71,000 flights operating daily at the end of October.
- October 2020 saw 4.75 million flight hours operated globally, down 30% from the 6.77 million flight hours flown in October 2019. Average daily flight hours at the end of October were 150,000 hours daily, down 31.5% from 219,000 hours daily at the same point in 2019.

Recovery seems to have stalled

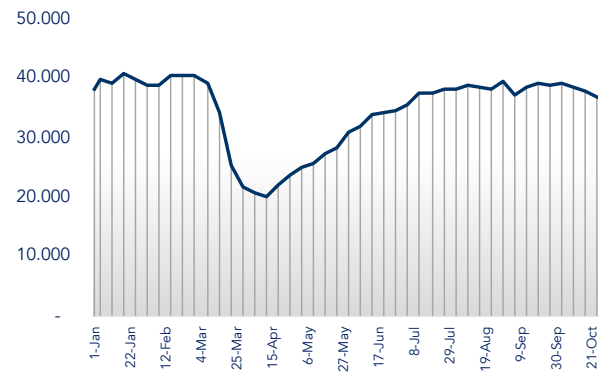
Having not witnessed the normal peak travel season in August and with the industry still in recovery, it is somewhat surprising to see October global traffic showing a normal seasonal decline in volumes, suggesting that the recovery most hoped would continue, has stalled.

Increasing COVID-19 infection rates have resulted in new and evolving traffic restrictions introduced in October, including in the important European market.

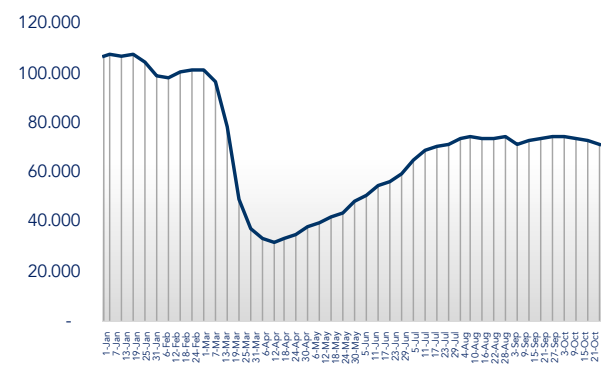
At the end of October an average of 37,700 unique aircraft were operating daily. That is only 7% lower than the number that were operating just prior to pandemic-related travel restrictions being imposed at the beginning of the year.

Since the pandemic low point for global traffic that was experienced in mid-April, the number of global flights has grown by 130%. That represents a decline of 5% on the numbers operating in late August. Global flight hours have grown by 115% since mid-April, down from growth of 120% in late August.

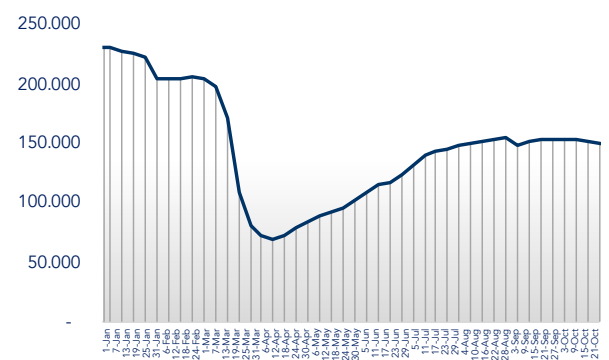
Average unique aircraft



Average global flights

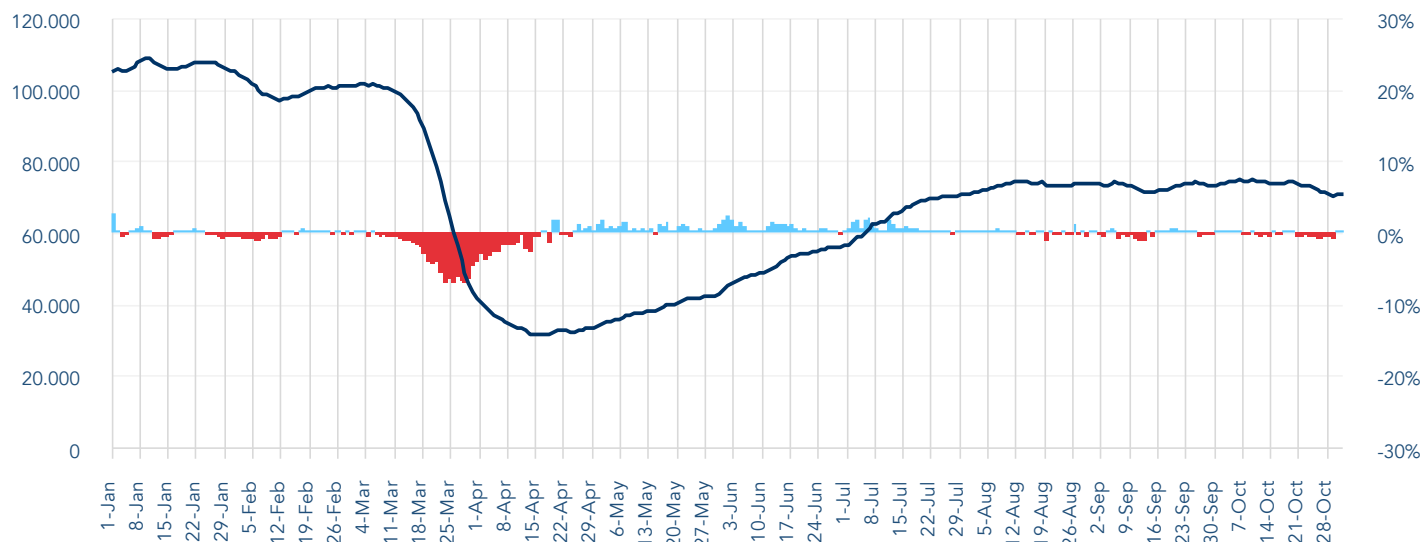


Average global flight hours



Global daily flights variation

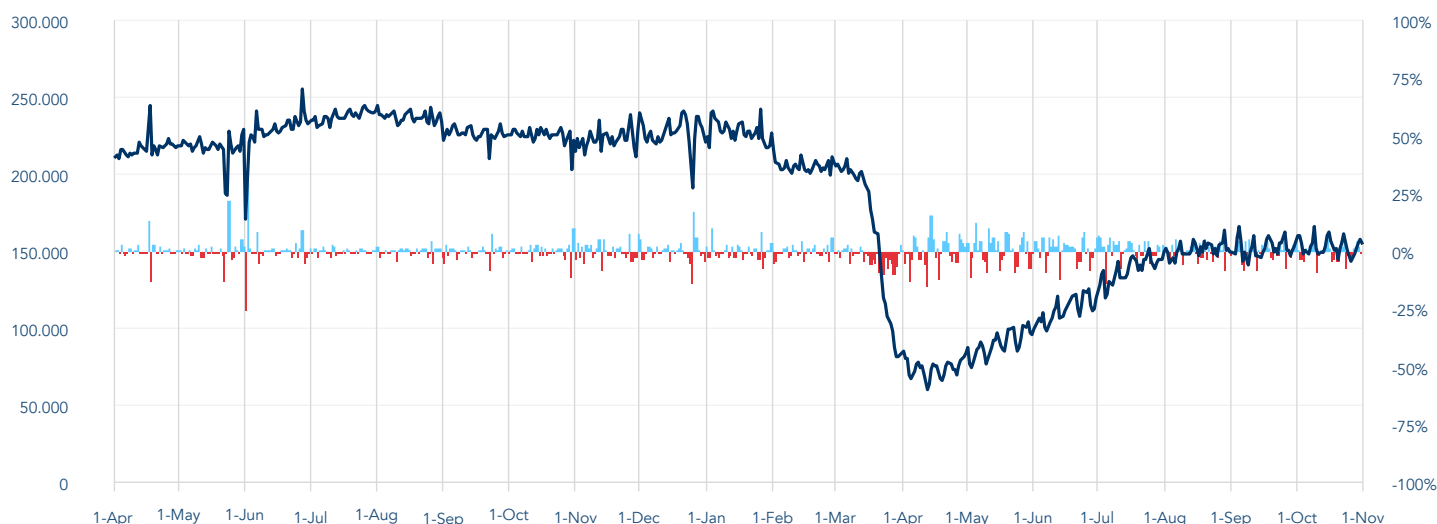
Rolling 7-day average of daily flights



The rolling 7 day average of global daily flight volumes shows a distinct decline in the latter half of October, ending the month at 70,800 flights daily, down 4000 flights daily from numbers seen at the beginning of the month. With much recovery achieved, a distinct slowing of the growth rate in average daily flight volumes that began in mid-July became a flattening of growth in mid-August and is starting to show concerning signs of contraction as pandemic-related travel restrictions are reintroduced in many jurisdictions.

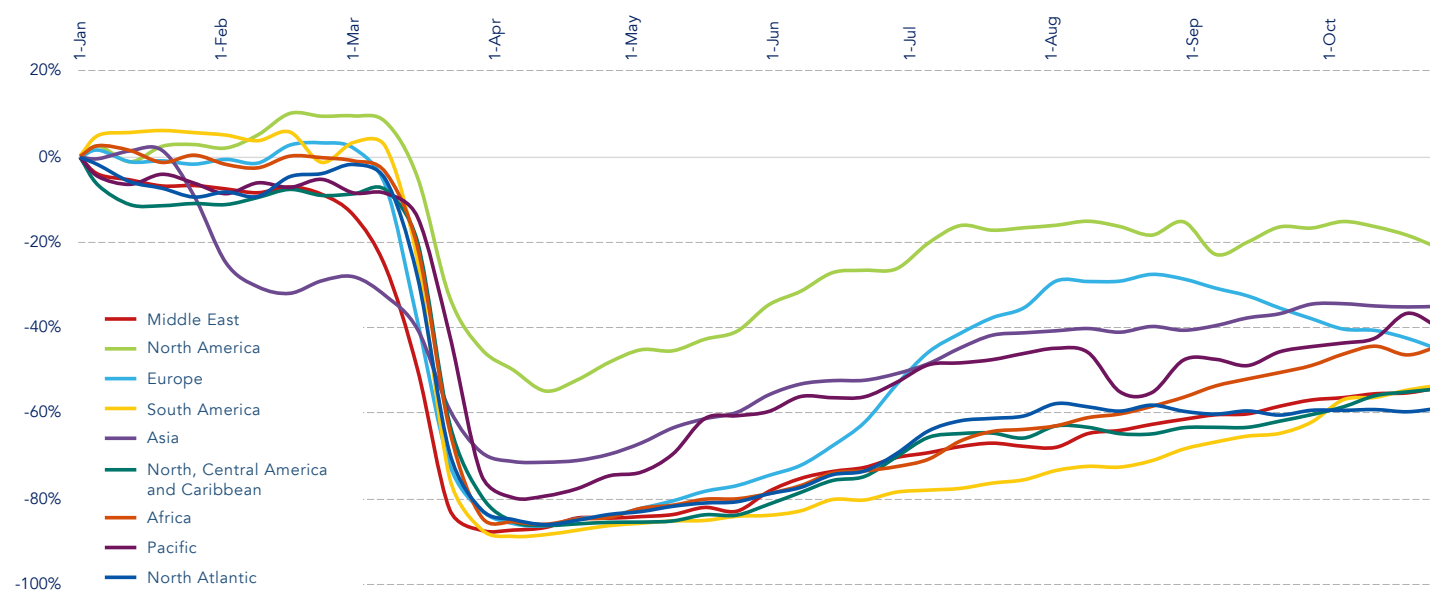
Daily flight hours

Flight hours since April 2019 with percentage of day-to-day variability



Daily flight hours, an important metric of ATM workload, exceeded 166,000 hours globally on 4 September, and again on 9 October 2020. Those two days represent the highest level of daily flight hours since March 20th, 32 weeks ago.

Percent change in movements by region



While South America, Central America and the Caribbean, the Middle East and Africa continued to show signs of small but steady traffic growth in both September and October, recovery in other regions remained level, with some showing marked declines. Europe showed the most significant contraction in absolute traffic levels, falling from an average of almost 18,000 flights per day in August to 13,000 flights per day at the end of October. Asia and the Pacific Region continued to show some strength based on domestic traffic and bilateral corridors. While strength in United States domestic traffic continues to blunt the impact of the pandemic on North American traffic, the strategically important North Atlantic traffic is now the most significantly off of its normal volumes, having been essentially flat since the beginning of August.

Average daily flight hours and average daily movements by region

	Dates	Average daily flight hours	Percent change	Average daily movements	Percent change
Middle East	01 Jan 2020 25 Oct 2020	7,400 4,400	41%	6,100 2,800	54%
North America	01 Jan 2020 25 Oct 2020	67,400 54,800	19%	38,000 30,000	21%
Europe	01 Jan 2020 25 Oct 2020	44,700 25,400	43%	24,900 13,700	45%
South America	01 Jan 2020 25 Oct 2020	10,700 4,900	54%	5,800 2,700	53%
Asia	01 Jan 2020 25 Oct 2020	74,900 48,100	36%	35,000 22,800	35%
Caribbean	01 Jan 2020 25 Oct 2020	9,100 4,200	54%	6,400 2,900	55%
Africa	01 Jan 2020 25 Oct 2020	4,200 3,500	17%	1,800 1,000	44%
North Atlantic	01 Jan 2020 25 Oct 2020	6,800 2,600	62%	2,300 900	61%

About the ATM report

The ATM Report is issued bi-weekly by CANSO as an analysis of metrics directly relevant to the ATM industry. The report uses high fidelity global space-based ADS-B air traffic data provided via a partnership with Aireon. The data includes surveillance of all 1090Mhz ADS-B Equipped aircraft. While some non-ADS-B equipped aircraft may not be included, the data is appropriate for the monitoring of global trends in traffic levels.

About CANSO



The Civil Air Navigation Services Organisation (CANSO) is the global voice of air traffic management. CANSO Members support almost 90 percent of world air traffic and represent leading providers of technology and services to the industry. Members share information and develop new policies, with the ultimate aim of improving air navigation services. For more, visit canso.org.

About Aireon



Aireon is harnessing next-generation aviation surveillance technologies that were formerly ground-based and, for the first time ever, is extending their reach globally through the use of satellite technology to significantly improve efficiency, enhance safety, reduce emissions and provide cost savings benefits to all stakeholders. For more information, please visit aireon.com.

