

CANSO ATM TRAFFIC ANALYSIS REPORT

MARCH 2023

Global air travel volumes continue to march towards recovery

- There were 3.8 million flights operated globally in March 2023. This represents a 22 per cent increase on the number of flights in March 2022.
- March 2023 saw 7.10 million flight hours operated globally. This is an 18.4 per cent increase on the number of flight hours in March 2022.

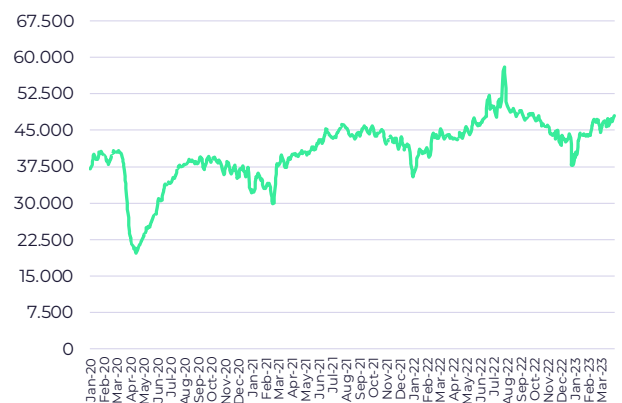
What will summer 2023 bring?

Just over a year since Omicron cases peaked globally, air traffic recovery remains strong, with significant year over year growth of flights and flight hours.

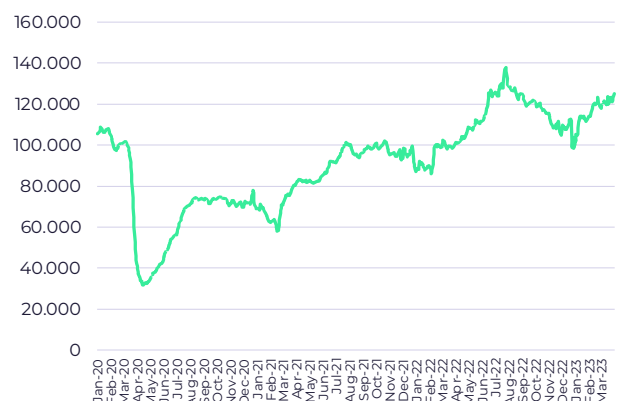
It remains interesting to see what markets have emerged from the pandemic with strength. Holiday destinations continue to show strong growth and carriers adding capacity in these regions.

While the demand for air travel has normally been viewed as highly sensitive to changes in prices and incomes, strong growth continues despite rising airfares and tough economic conditions in many jurisdictions.

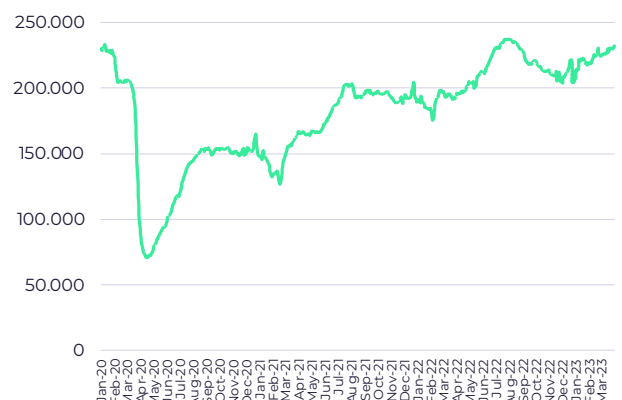
AVERAGE UNIQUE AIRCRAFT



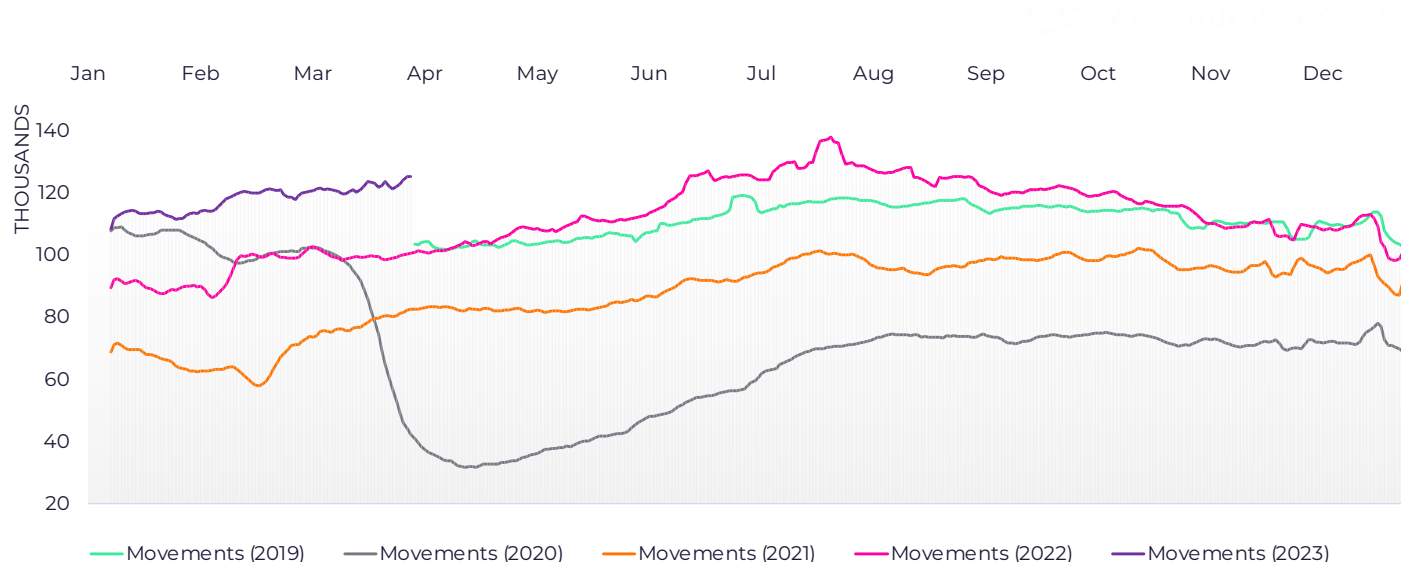
AVERAGE GLOBAL FLIGHTS



AVERAGE GLOBAL FLIGHT HOURS

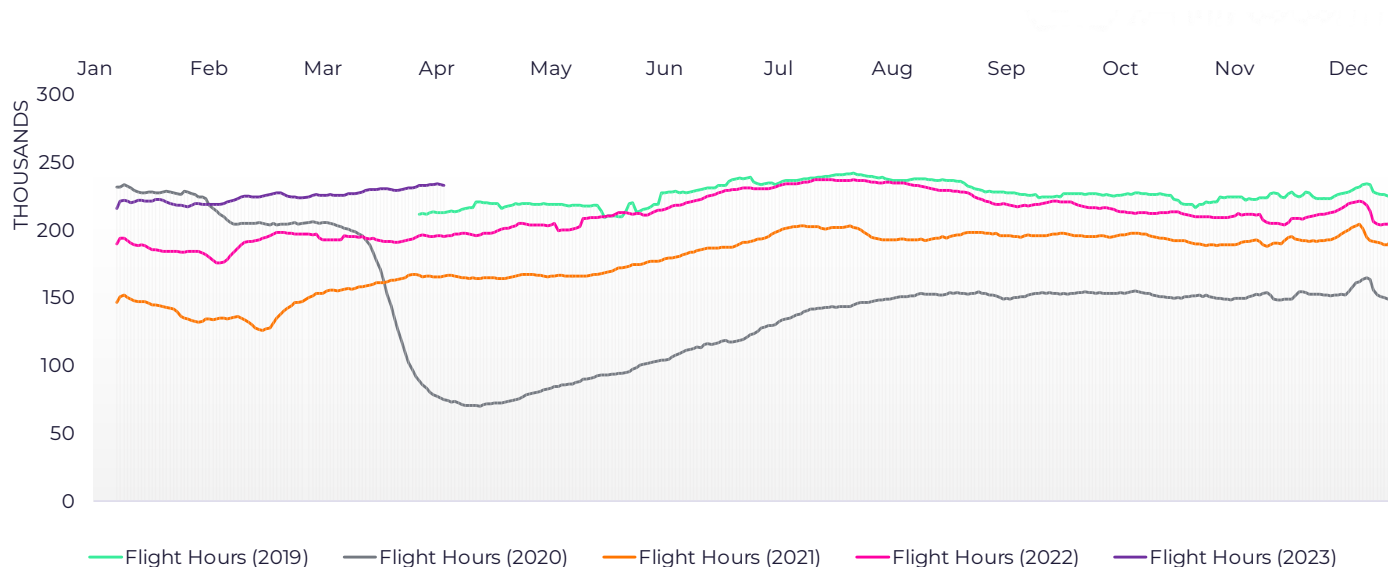


Global daily flights variation



The rolling 7-day average of global daily flight volumes was up on February, ranging between 120,000 and 125,000 flights daily in March.

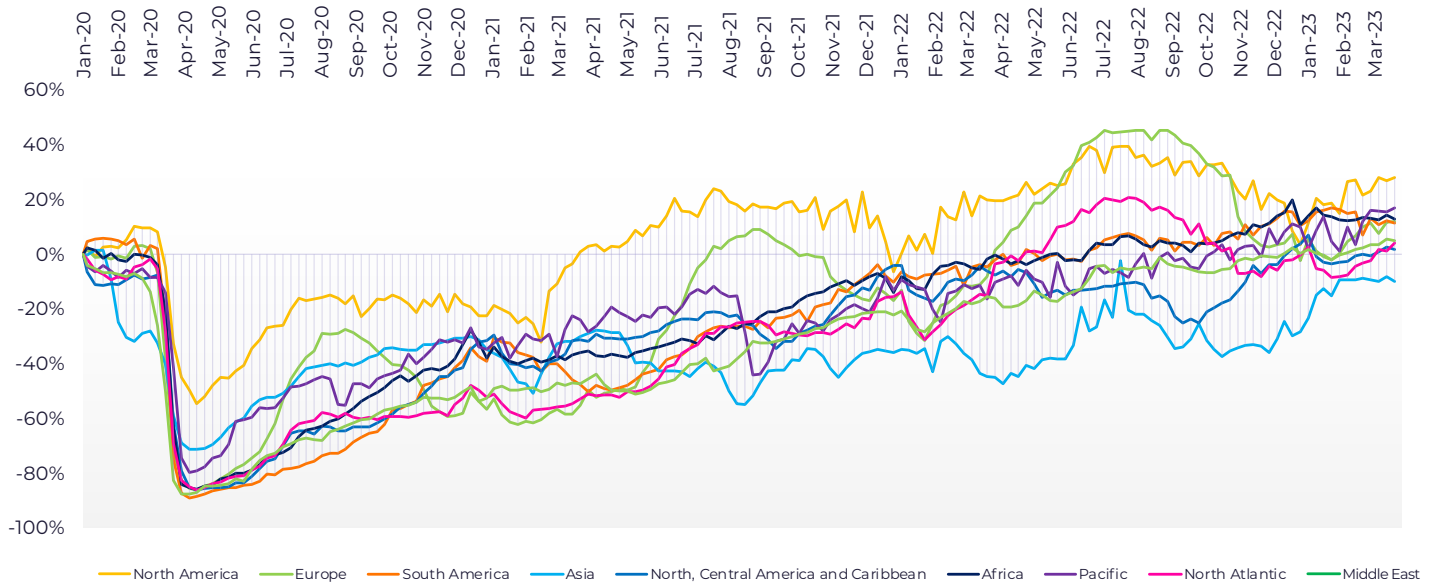
Daily Flight Hours



Global flight hours are an important metric of ATM workload. The post pandemic high remains July 29, 2022 when 244,000 flight hours were operated globally.

Daily flight hours in March 2023 ranged between 221,000 on March 8 and 236,000 on March 24, 2023.

Percent change in movements by region



A more normal seasonality emerges in March traffic patterns as northern hemisphere markets showed good month over month growth. Air traffic volumes in the Pacific showed strong numbers, likely as a result of the reopening of markets in China, while Africa and South America continue to hold the strong growth from recent months.

Tracking the recovery: Flights and flight hours by region

| | Dates | Average daily flight hours | Percent change | Average daily movements | Percent change |
|----------------|---------------------------|----------------------------|----------------|-------------------------|----------------|
| Middle East | 1-Jan-2020 19-Mar-2023 | 7,400 10,500 | +41% | 6,100 6,400 | +5% |
| North America | 1-Jan-2020 19-Mar-2023 | 67,400 74,500 | +10% | 38,000 48,700 | +28% |
| Europe | 1-Jan-2020 19-Mar-2023 | 44,700 42,400 | -5% | 24,900 27,900 | +12% |
| South America | 1-Jan-2020 19-Mar-2023 | 10,700 11,100 | +4% | 5,800 6,500 | +12% |
| Asia | 1-Jan-2020 19-Mar-2023 | 74,900 71,300 | -5% | 35,000 31,600 | -10% |
| Caribbean | 1-Jan-2020 19-Mar-2023 | 9,100 9,100 | 0 | 6,400 6,500 | +2% |
| Africa | 1-Jan-2020 19-Mar-2023 | 4,200 4,500 | +7% | 1,800 2,100 | +17% |
| North Atlantic | 1-Jan-2020 19-Mar-2023 | 6,800 6,700 | -2% | 2,300 2,400 | +4% |

ABOUT THE ATM REPORT

The ATM Report is issued monthly 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. Whilesome 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.

