

TFWA

CHINA REBORN

ONLINE EVENT
01-03 DECEMBER 2020





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疫情影响下的民航市场

Civil aviation market influenced by COVID-19

CAPSE Wang Zhiyong



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About CAPSE

CAPSE (Civil Aviation Passenger Service Evaluation) was officially established in 2012. As an independent third-party civil aviation service evaluation agency, CAPSE focuses on providing civil aviation service data consulting and service solutions with the goal of "listening to passengers and enhancing service value".

Leveraging the mobile Internet technology, CAPSE has conducted a comprehensive analysis of passenger review data through real passenger surveys, reflecting the current status of civil aviation services in China.

With 19 years of experience and expertise in the industry, CAPSE is committed to providing multi-dimensional and scientific evaluation of civil aviation service through real and objective data, with insight into civil aviation service trends.

As of January 2020, nearly 80% of Chinese civil aviation entities have adopted CAPSE data indicators, and over 40 of them have applied CAPSE data analysis reports and service solutions.



- ◆ 01 疫情下的中国民航市场
COVID-19 impact on China's civil aviation market
- ◆ 02 全球民航变化趋势
Global civil aviation trends
- ◆ 03 出行需求的变化趋势
Trends in travel willingness



◆ 01 疫情下的中国民航市场

COVID-19 impact on China's civil aviation market

疫情使中国民航倒退到哪一年？ What year does the epidemic make China's civil aviation retrograde?

2020年内地机场周起降架次与历年周均对比 By comparing weekly aircraft movements in 2020 with the historical data (weekly average)



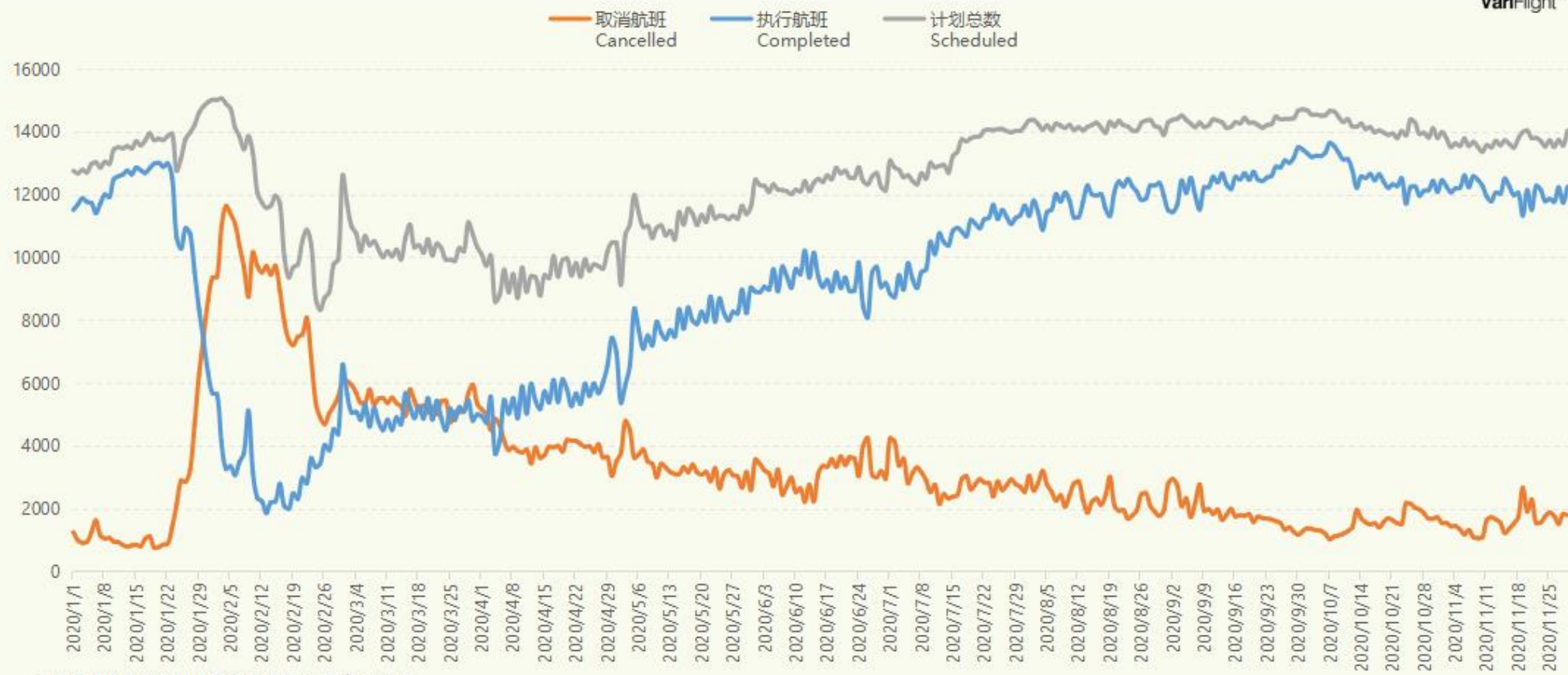
VariFlight®

2020年峰值
209649架次2019年
189249架次2018年
179756架次Week44
(10.26-11.1)
180188架次

VariFlight® 飞友科技



中国内地航班执行情况 Flight Completion of Mainland China



*中国内地航线所有民航客运航班 (去共享去经停)

*Scope of statistics: all domestic scheduled passenger flights to and from points of Mainland China (excluding code-sharing and stopover flights)

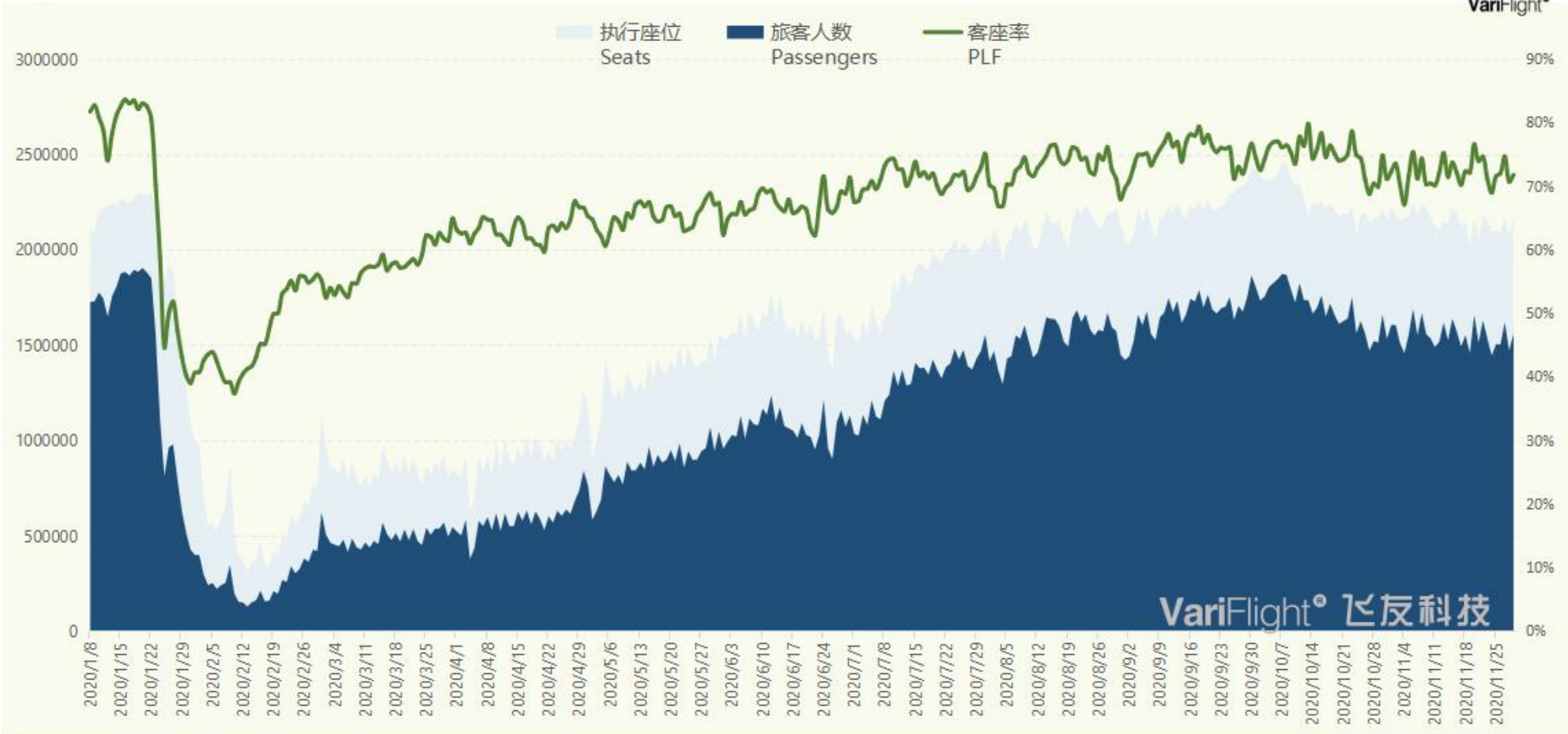


中国内地旅客需求趋势

Passenger Demand Trend in Mainland China



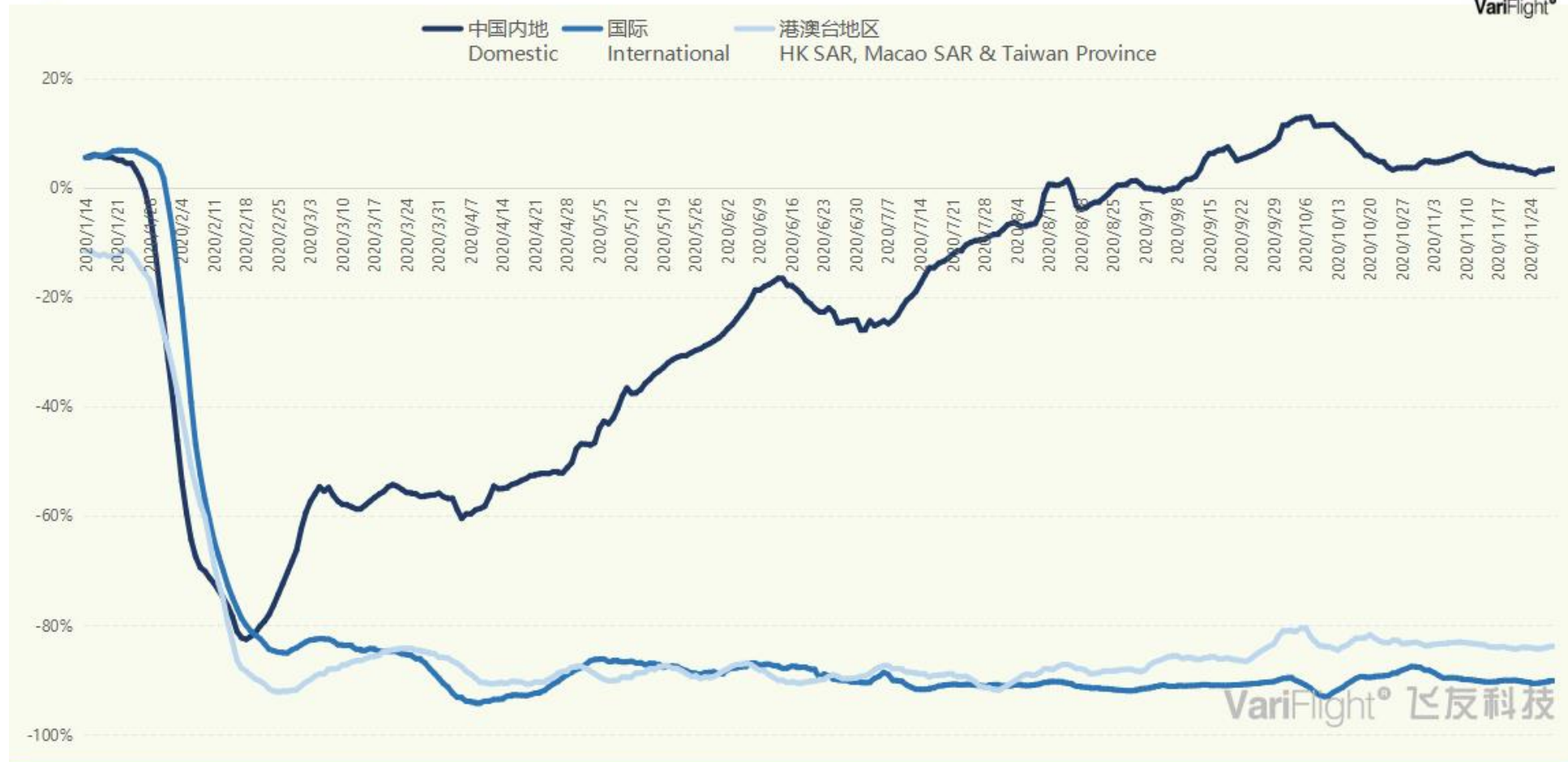
Variflight®





疫情影响中国内地航班运营实时动态指标CARDI

CARDI: Real-time Dynamic Indicators of Covid-19 Affecting Flight Operations in Mainland China



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business@VariFlight.com

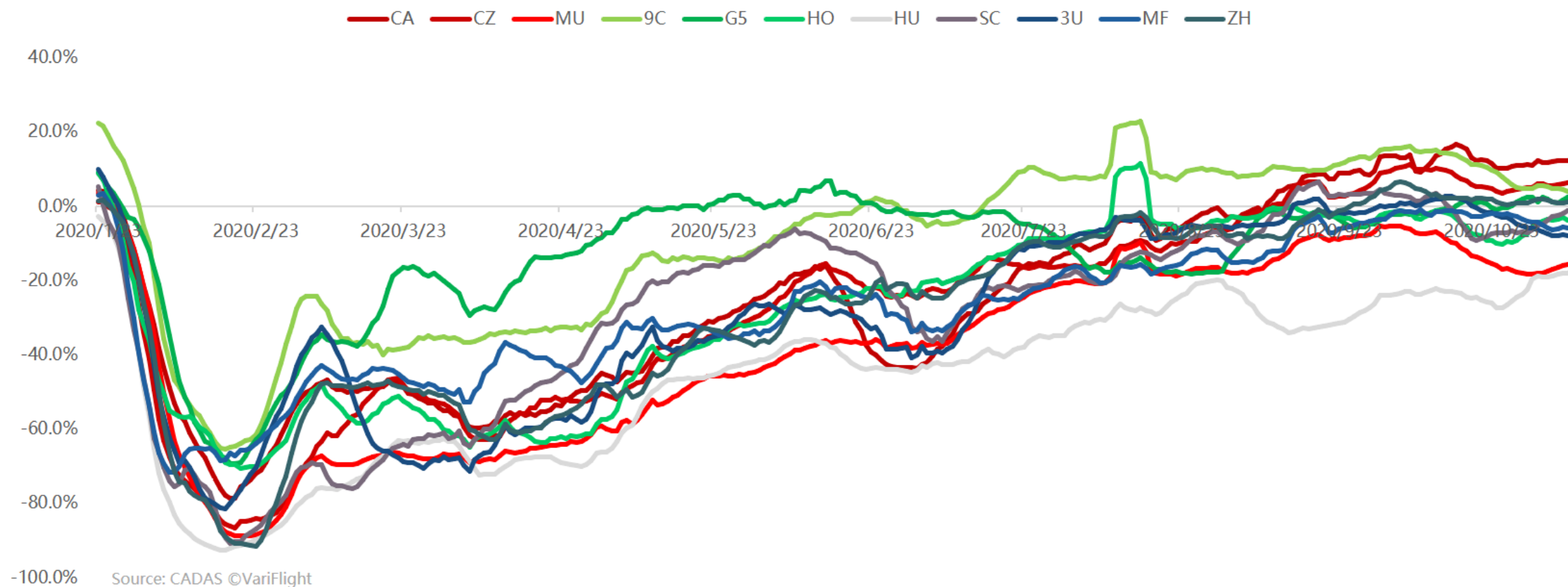


@VariFlight

数据来源: 飞友科技
Source: VariFlight

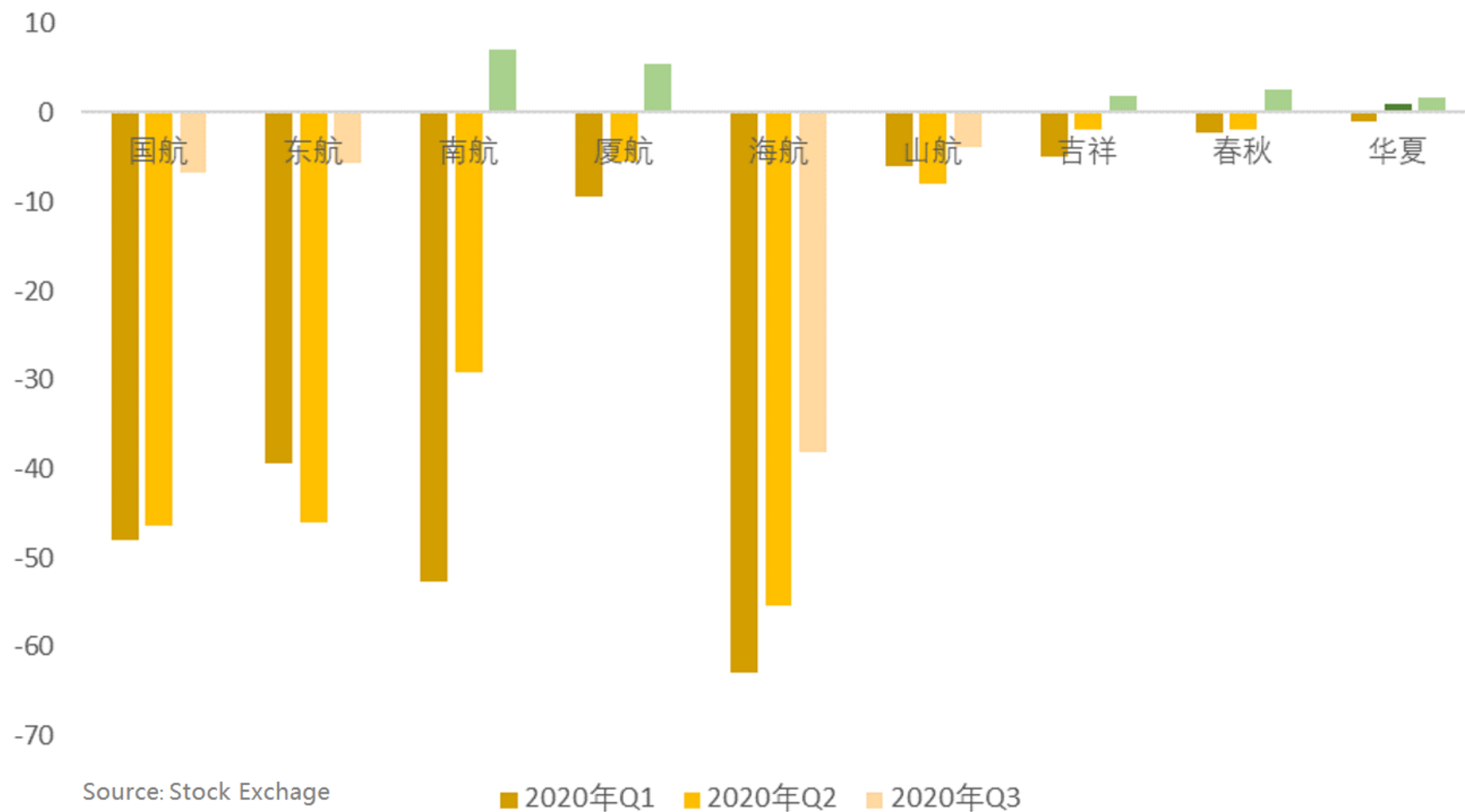


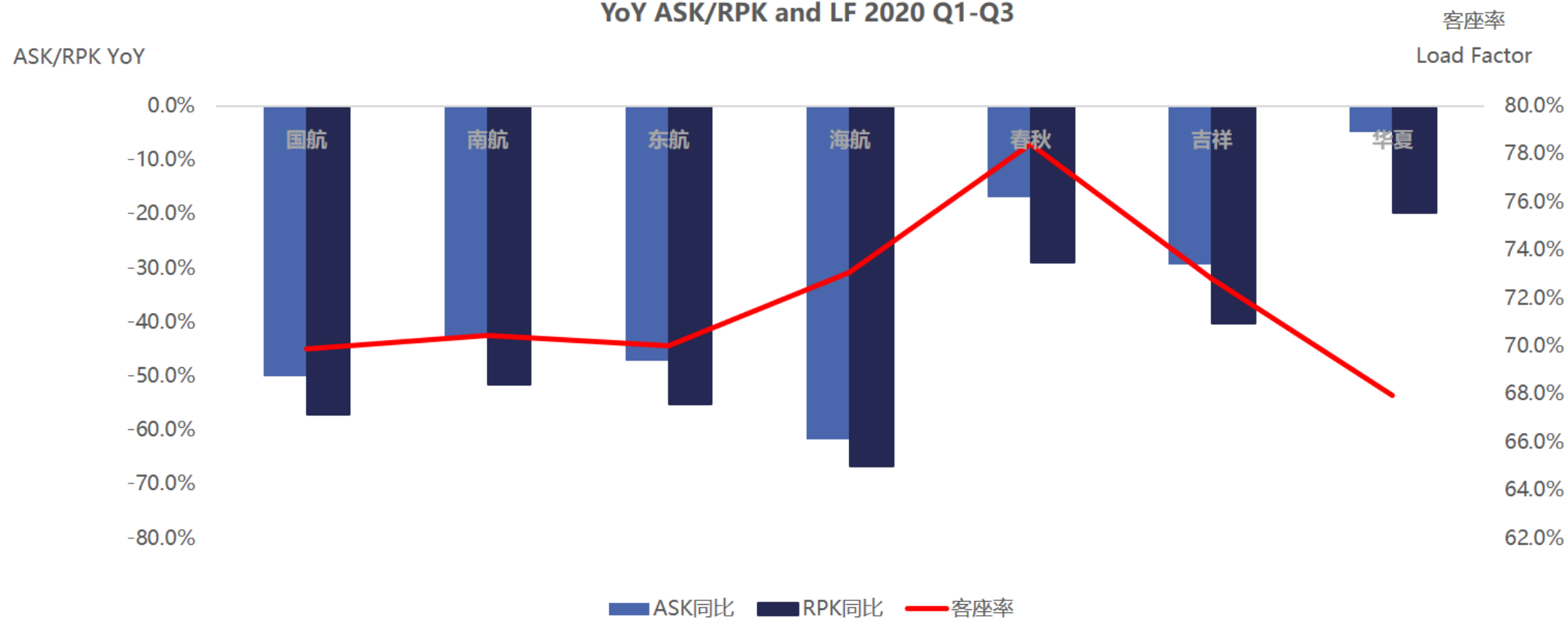
中国航司CARDI日趋势 CARDI for Chinese Airlines Daily Trend





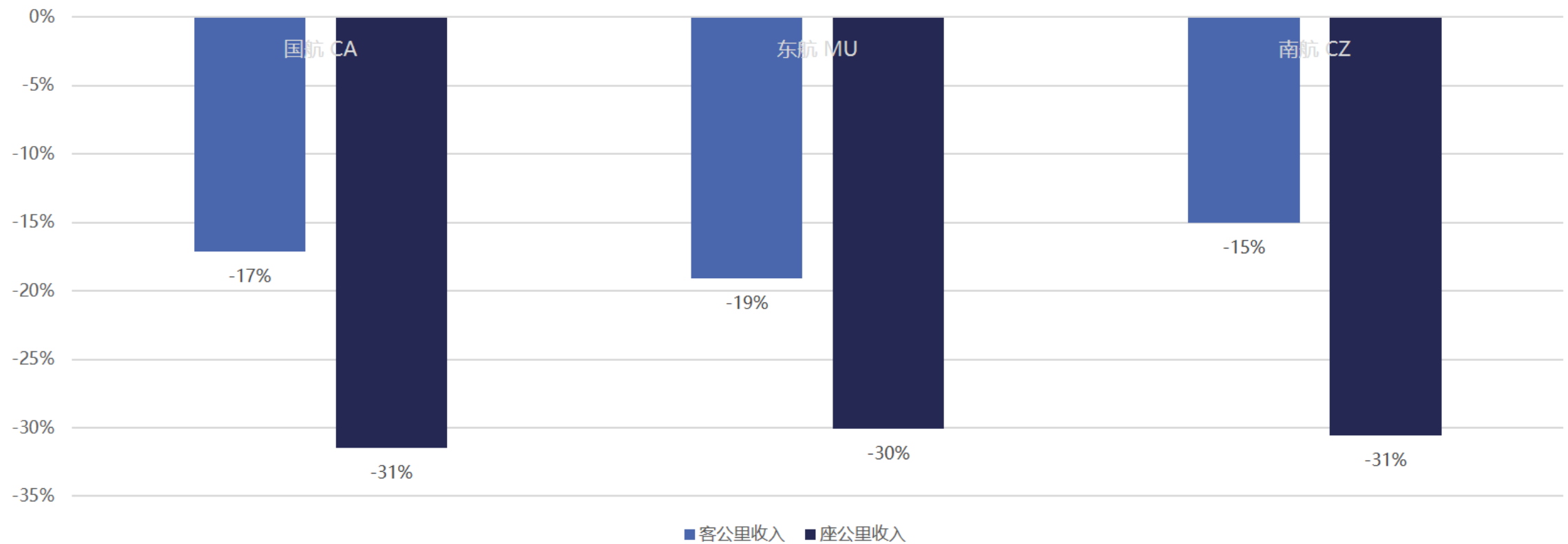
上市航空公司净利润变化情况 (亿元)



2020/2019 前三季度国内市场可用客公里与客公里收入的变化
YoY ASK/RPK and LF 2020 Q1-Q3



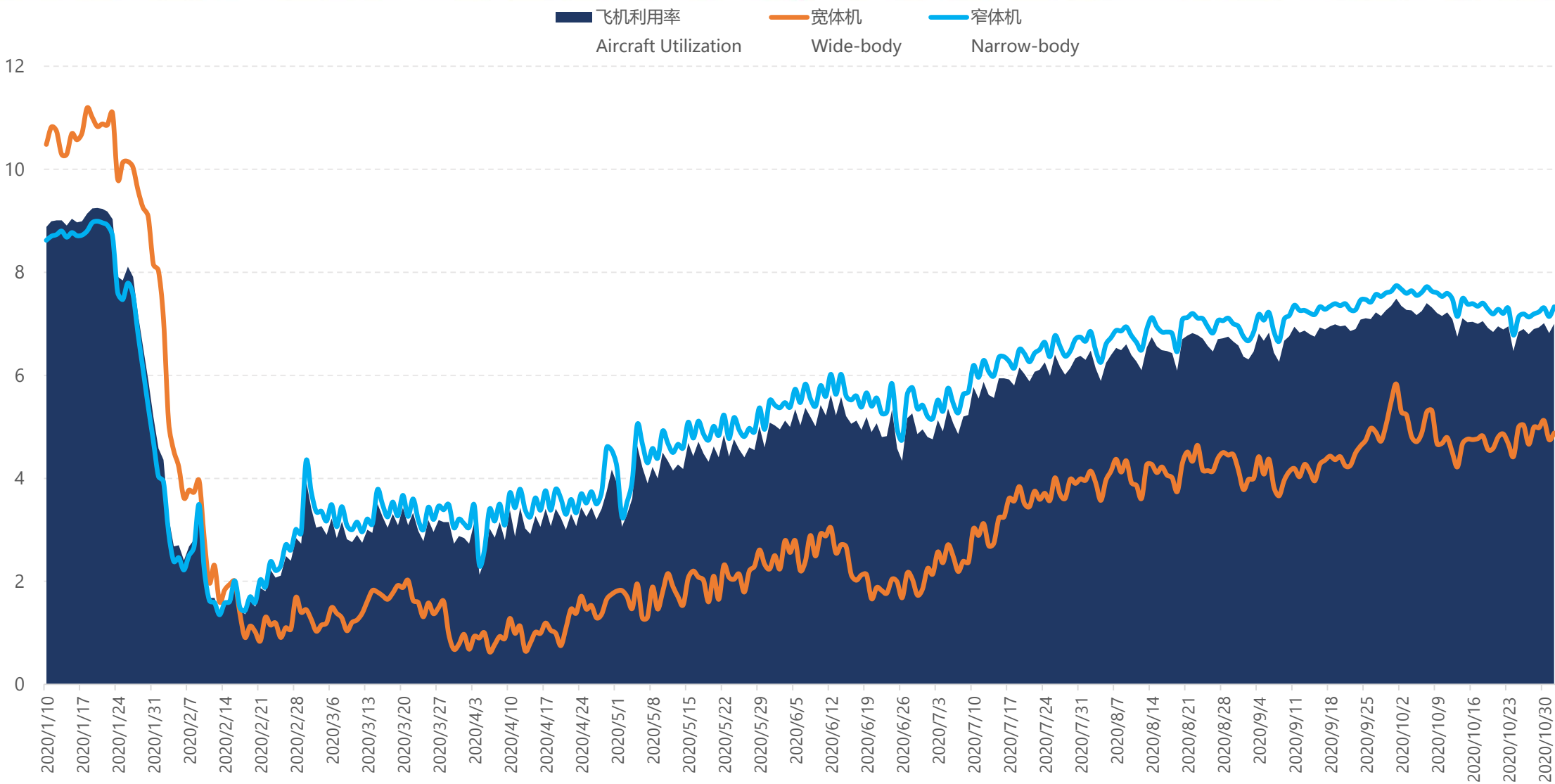
2020/2019 上半年国内市场客公里收入与座公里收入的变化
2020H1/2019H1 YoY on RPK and RASK





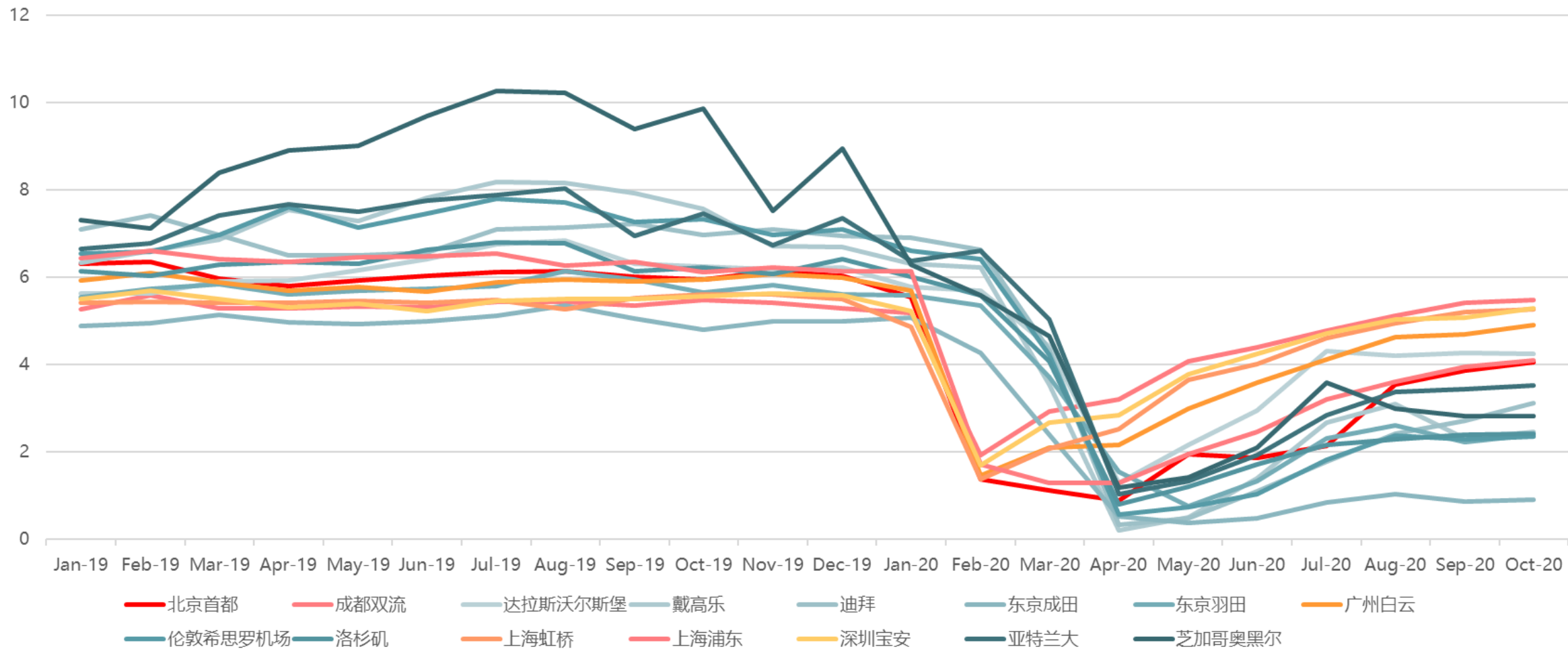
750亿 (RMB 75 billion) 2019/Q3

VS 2020/Q3 **20亿** (RMB 2 billion)





全球主要机场ADI (2019-2020)





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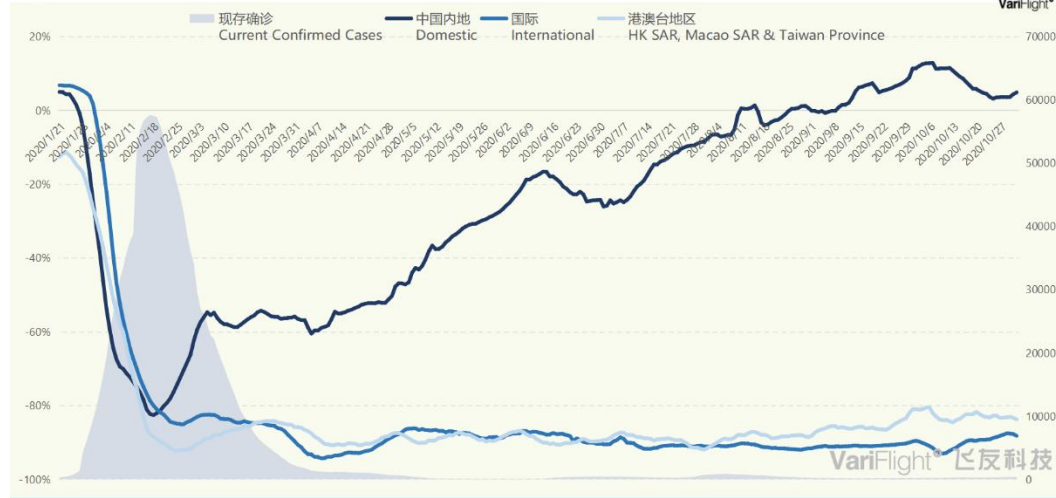


◆ 02 全球民航变化趋势 Global civil aviation trends



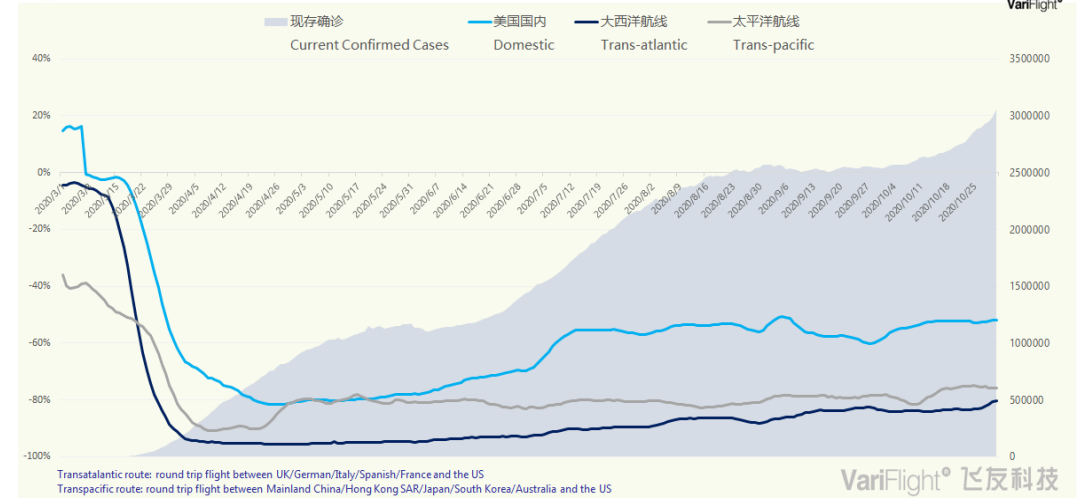
疫情影响中国内地航班运营实时动态指标CARDI

CARDI: Real-time Dynamic Indicators of Covid-19 Affecting Flight Operations in Mainland China



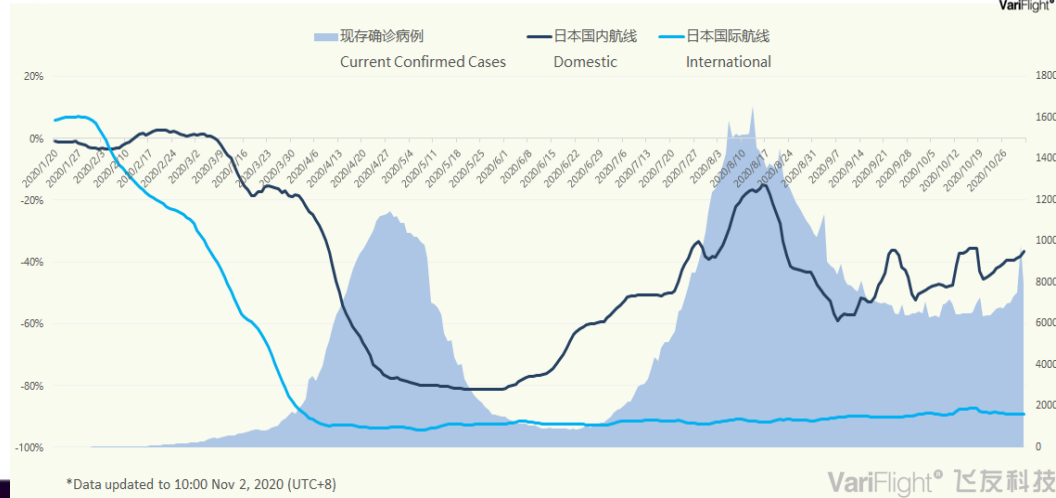
疫情影响美国航班运营实时动态指标CARDI

CARDI: Real-time Dynamic Indicators of Covid-19 Affecting Flight Operations in United States



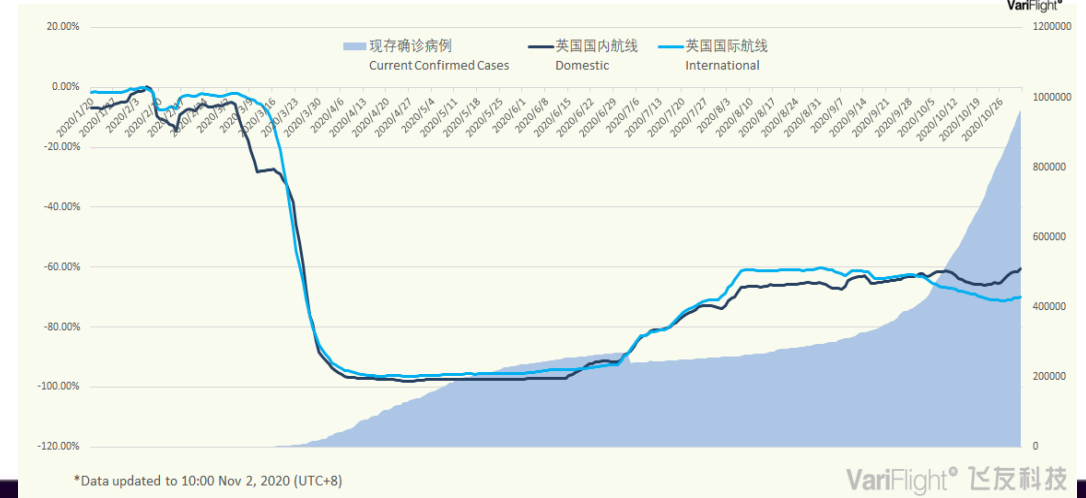
疫情影响日本航班运营实时动态指标

CARDI: Real-time Dynamic Indicators of Covid-19 Affecting Airline Operations in Japan

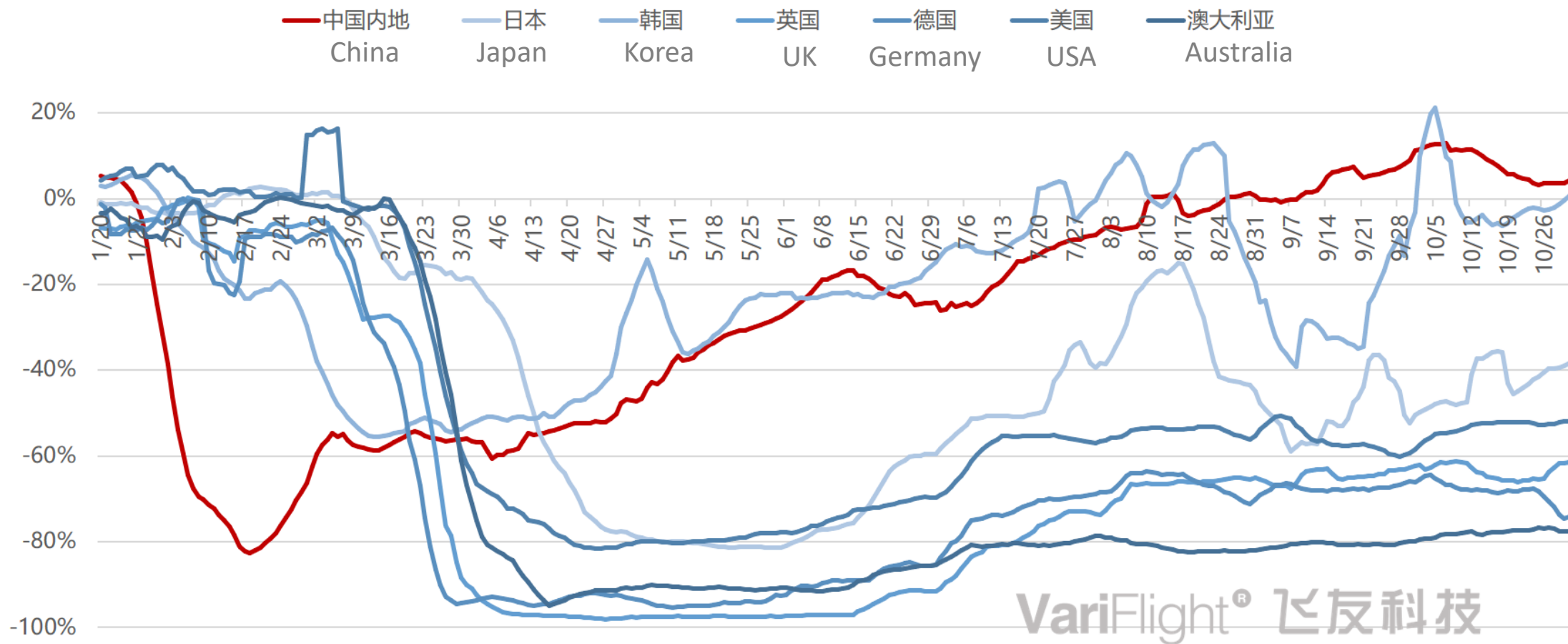


疫情影响英国航班运营实时动态指标

CARDI: Real-time Dynamic Indicators of Covid-19 Affecting Flight Operations in UK



主要国家境内航线CARDI



Source: VariFlight (截至2020年11月2日10:00)



◆ 03 出行需求的变化趋势

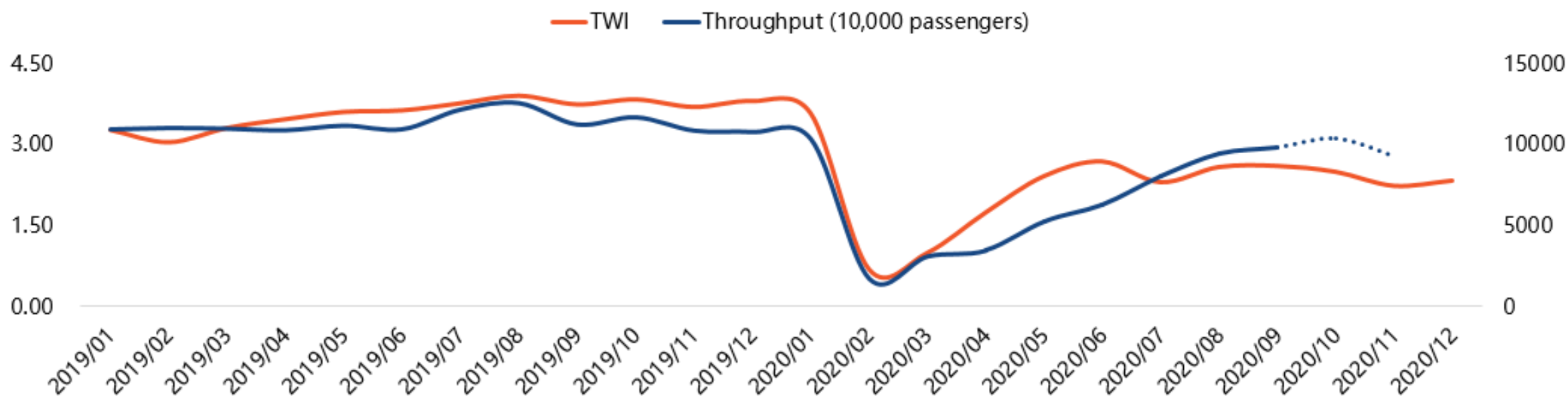
Trends in travel willingness



- **TWI** (Travel Willingness Index) calculates passengers' travel willingness by researching their purposes and expected number of trips in a period of time (monthly & annual). Higher **TWI** predicts more frequent planned trips. At the same time, according to passengers' travel purposes, it also calculates **TWI-B (Travel Willingness Index for Business)**, **TWI-L (Travel Willingness Index for Leisure)** and **TWI-I (International Travel Willingness Index)**.
- **TWI-d** (Travel Willingness Index for Destination) calculates passengers' travel willingness by researching their trips to planned destinations in a period of time (monthly & annual). For example, there are 10,000 Beijing travelers to Shanghai and 8000 to Chengdu, then the TWI-d of Beijing travelers is 100 for the destination of Shanghai and 80 ($8000 \times 100 / 10000 = 80$) for Chengdu.



旅客TWI与中国国内吞吐量关系分析 TWI and Passenger Throughput in China



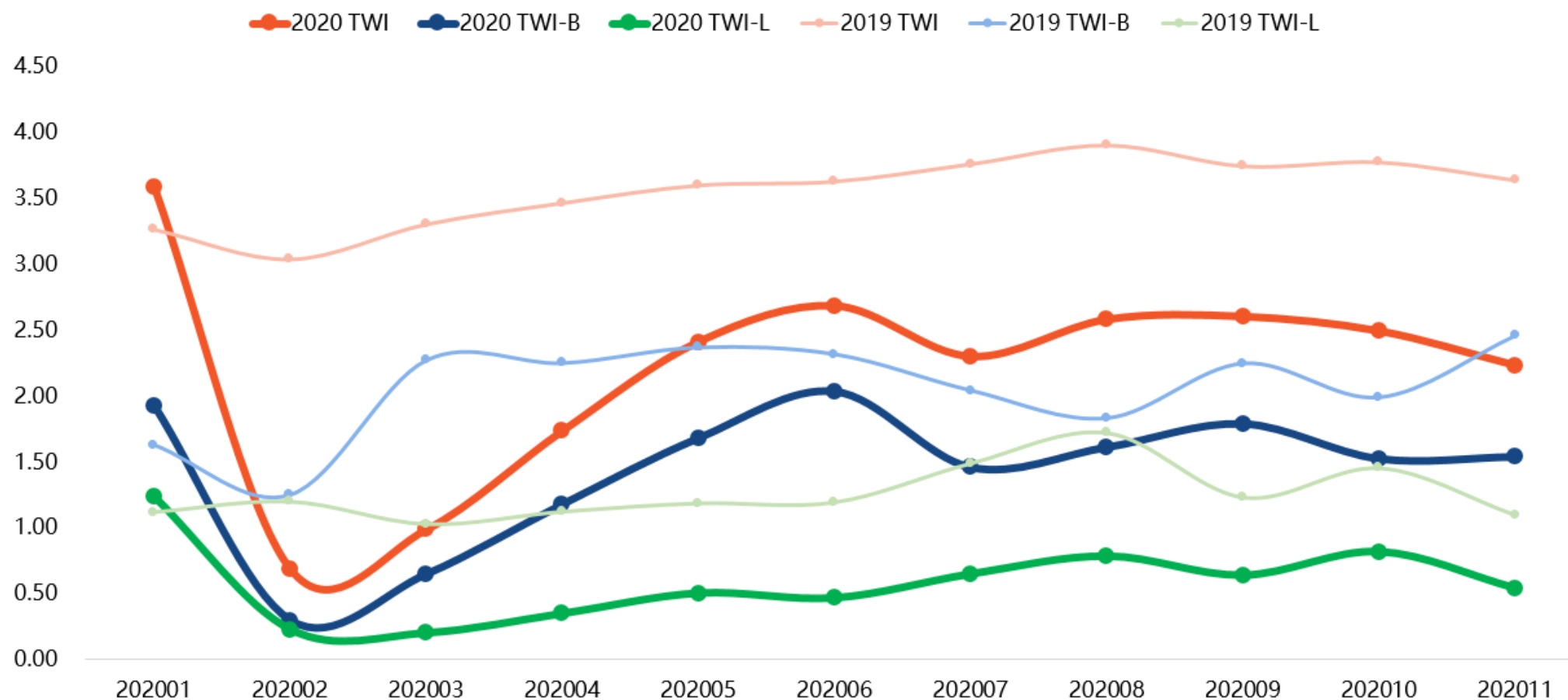
TWI data source: CAPSE

Throughput data source: CAAC/CADAS



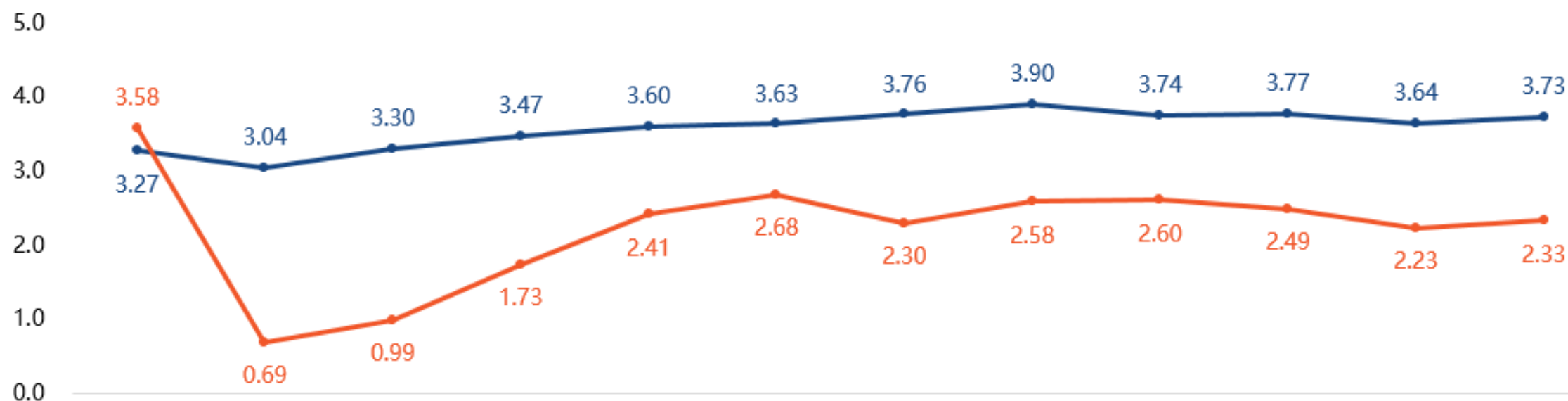
2020年各月份国内旅客出行意愿同比分析

TWI from Jan to Nov 2020





2020年各月份旅客TWI同比分析 TWI YoY Changes

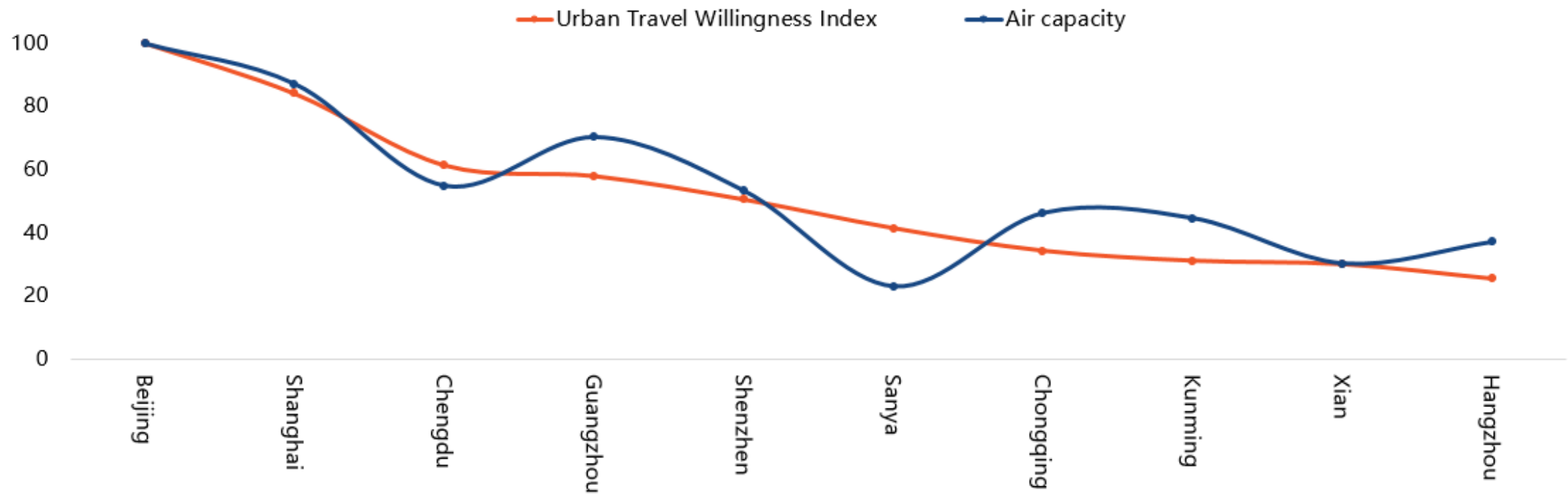


YOY	10%	-77%	-70%	-50%	-33%	-26%	-39%	-34%	-31%	-34%	-39%	-38%
MOM	-6%	-81%	44%	76%	39%	11%	-14%	12%	1%	-4%	-10%	4%



旅客出行意向城市指数top10与投入运力指数分析

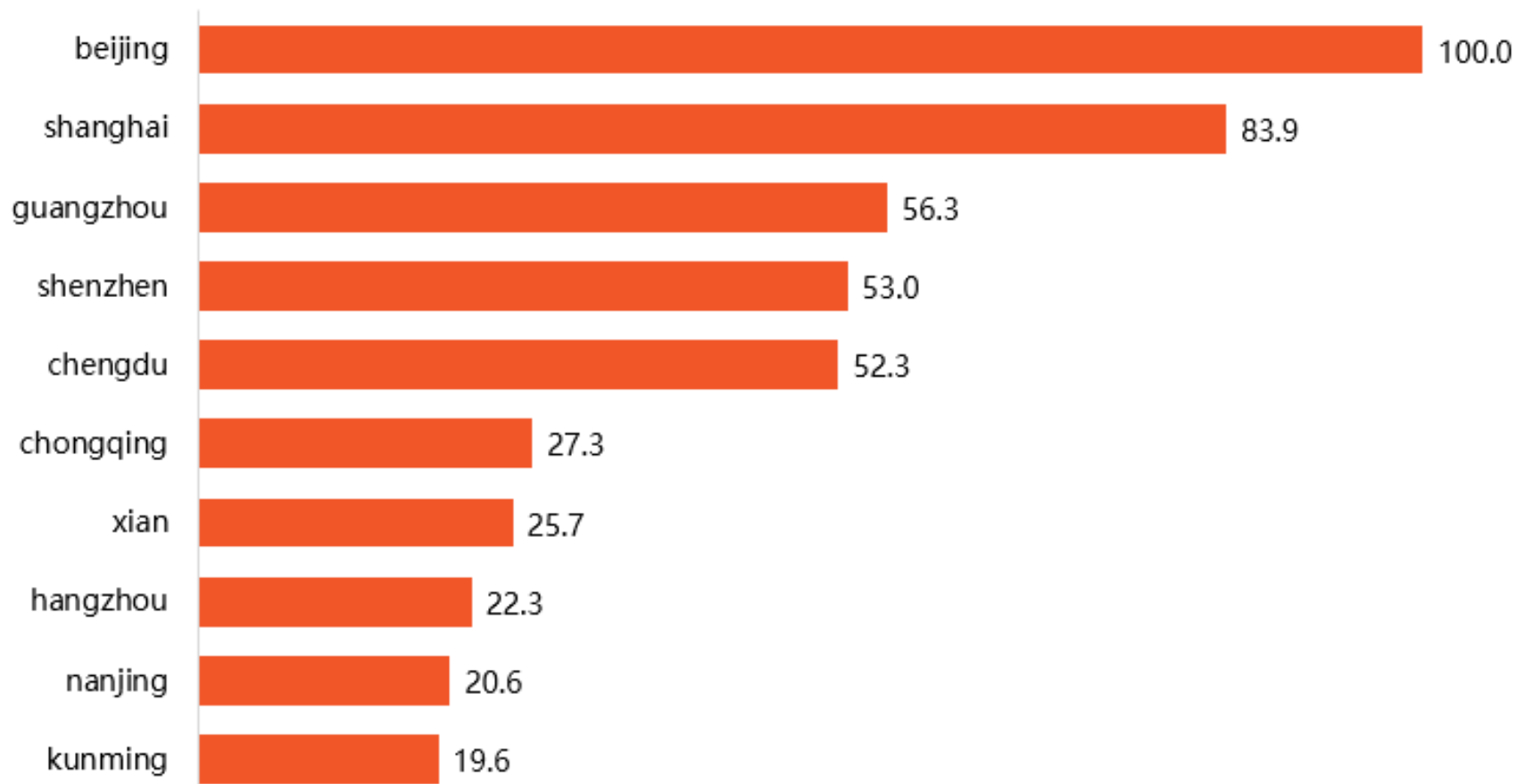
Urban Travel Willingness Index Top10





2020年12月份商务出行旅客TWI-d top10城市

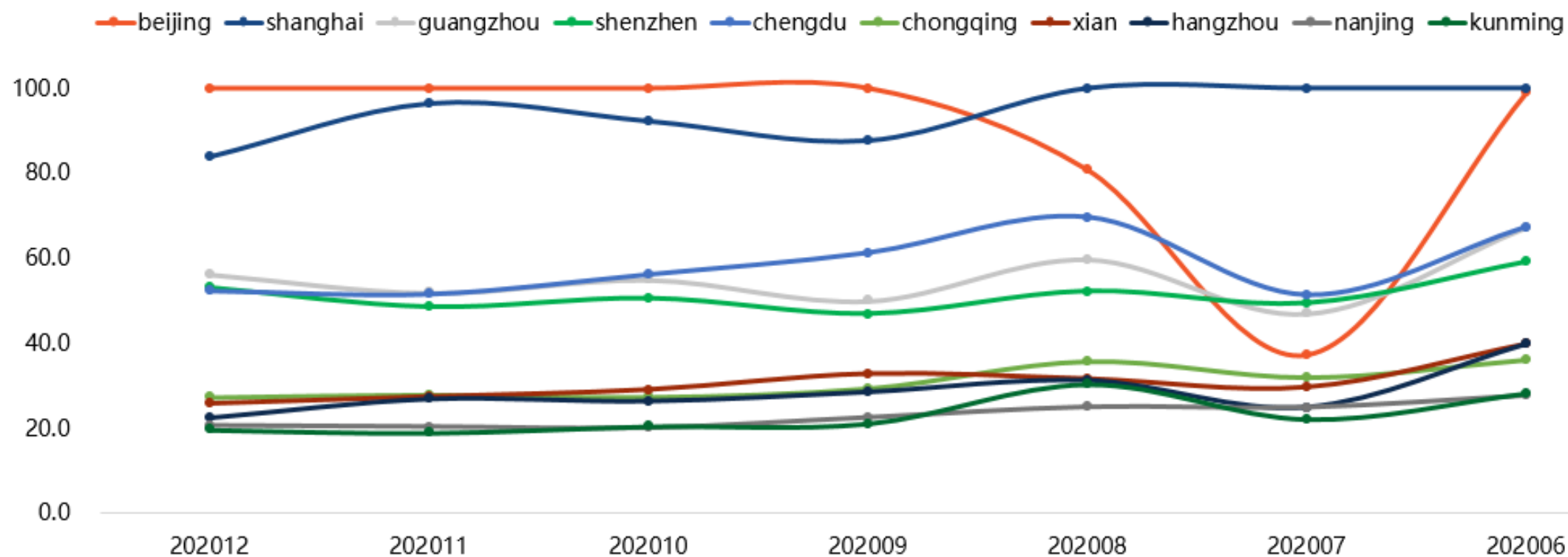
TWI-d: TOP10 destinations for domestic business travelers





商务出行旅客TWI-d主要城市变化趋势

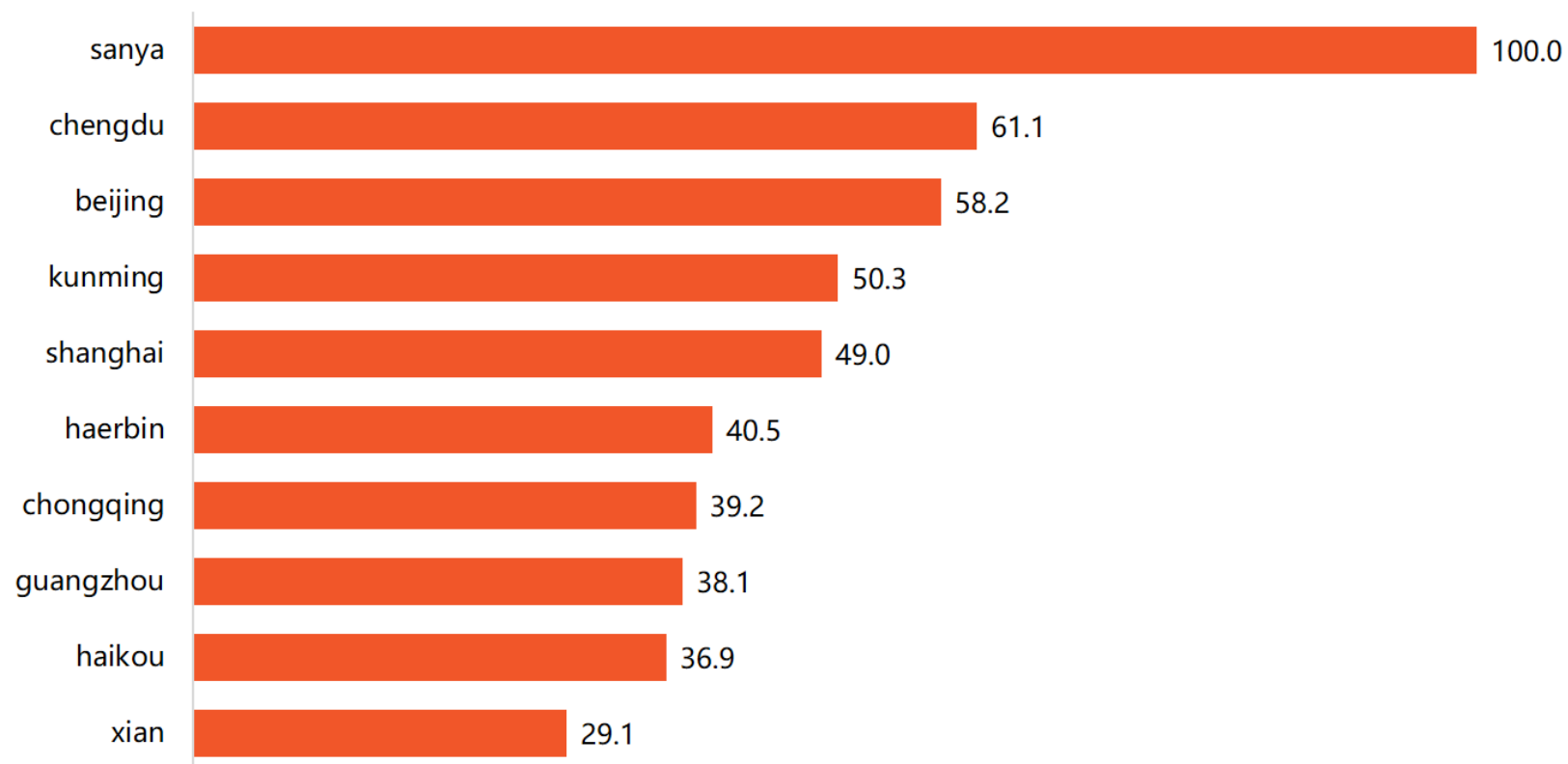
TWI-d





2020年12月份旅游出行旅客TWI-d top10城市

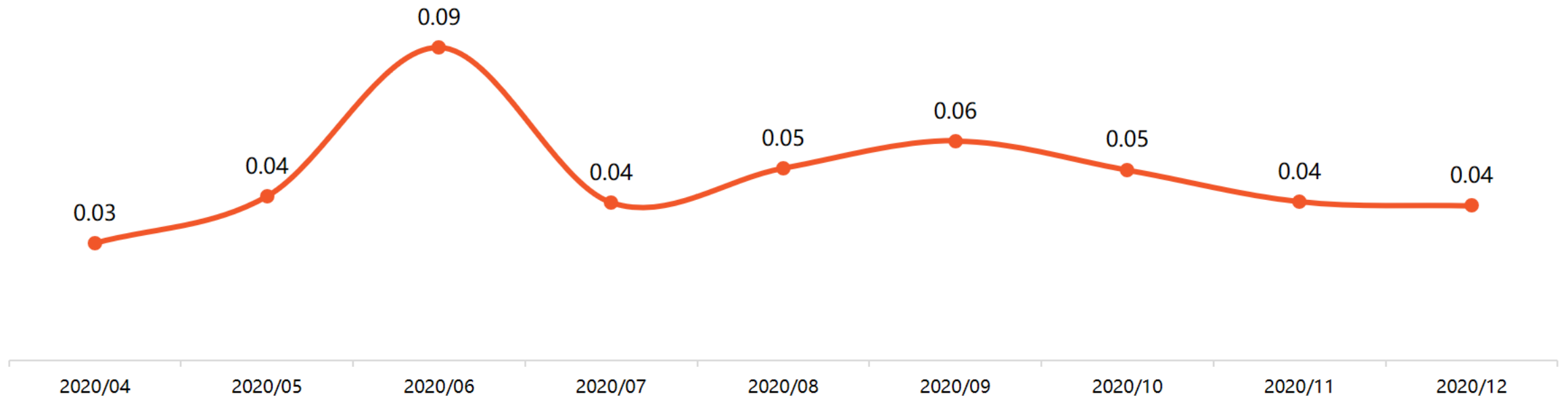
TWI-L: TOP10 destinations for leisure travelers in China





旅客TWI-I环比分析

TWI-I MoM changes





Every cloud has a silver lining

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