



# 'NEW NORMAL': WHAT ABOUT THE NEW POSSIBLE?

An industry-wide survey of the aviation sector  
framing our July 2020 Webinar series  
organised with the support of CANSO, ACI, ICAO and IATA



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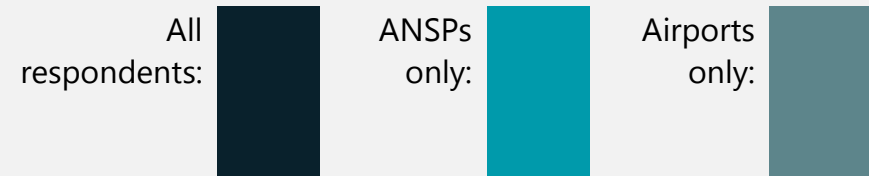
TYPE OF ORGANISATION AND STAFF ■ POSITION IN ORGANISATION ■ GEOGRAPHICAL DISTRIBUTION

# Introduction

The aviation industry has adapted to deal with the impact of other crises, but the magnitude of the impacts on aviation presented by COVID-19 are far greater than any downturns previously experienced. As the industry regains momentum and our focus shifts to recovery, we asked people how they have been affected? Have their plans changed, and if so how? What are the most pressing priorities for action? And where are the opportunities for progress – the ‘new possible’?

This exclusive online survey was accessed by invitation only and attracted good participation from all segments of the industry and most regions of the world. In this summary we report ‘all’ results, as well as separating out ANSPs and airports. Airline responses were insufficient in number to report separately with statistical confidence.

KEY:



The findings are shared under the following headings:

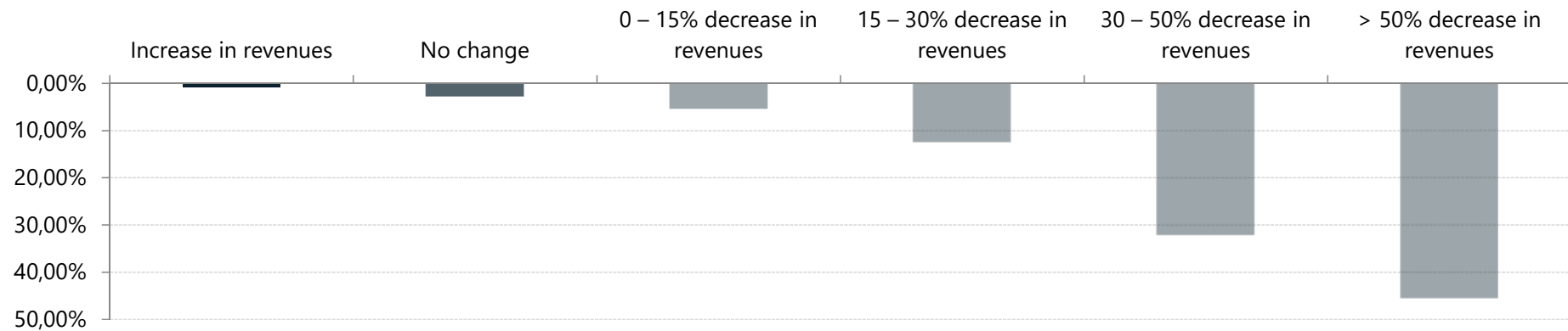
- Impact of the Pandemic
- The Recovery
- Challenges and Opportunities
- A Shift in Priorities
- About the respondents

# IMPACT OF THE PANDEMIC

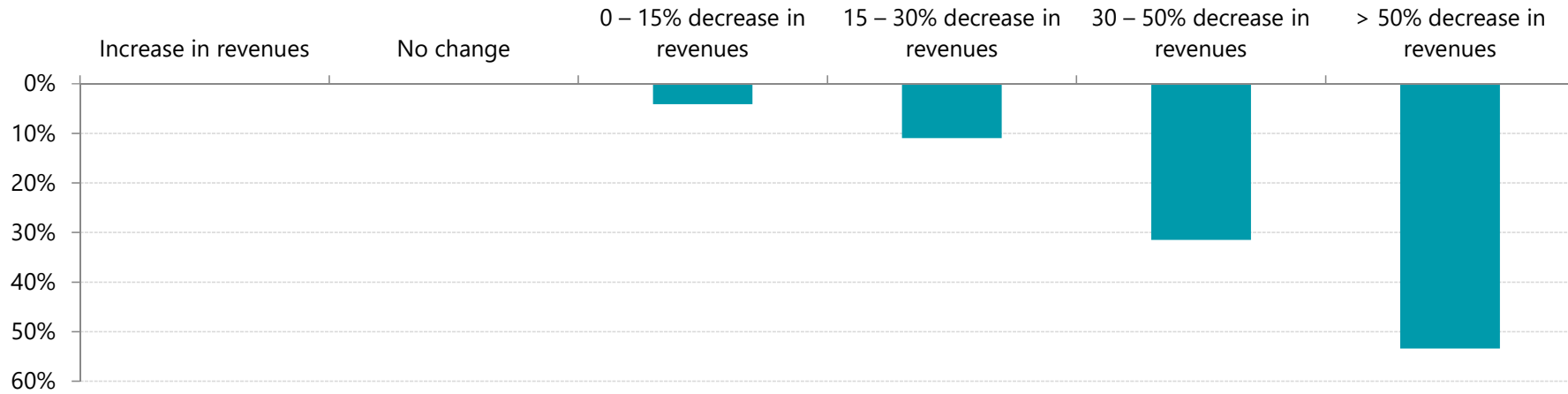


## Impact of the Pandemic - Reduced Revenues

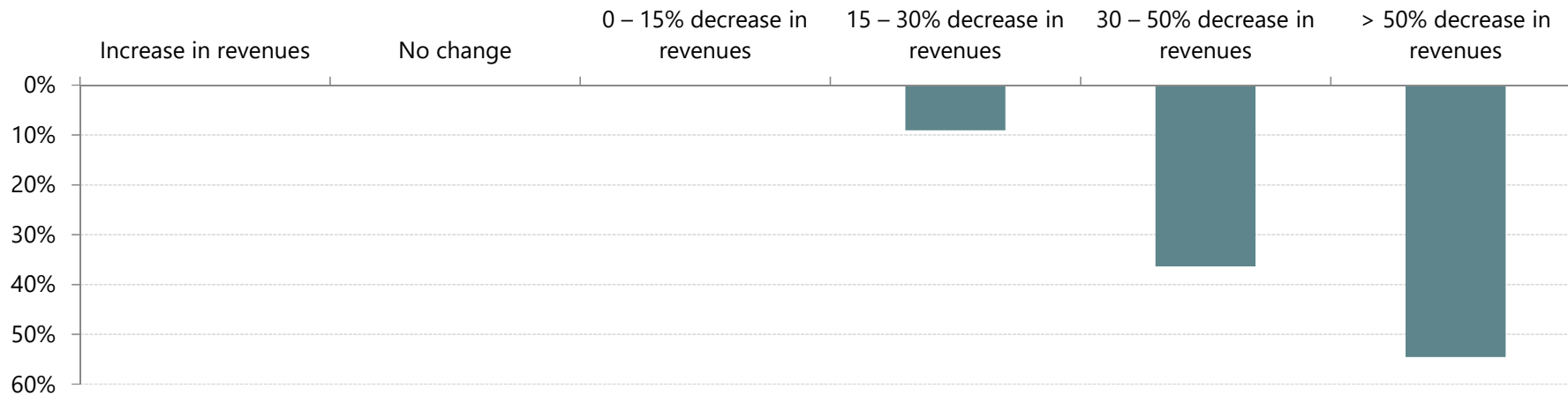
By what magnitude do you expect your total revenues to differ in 2020, in comparison with 2019?



By what magnitude do you expect your total revenues to differ in 2020, in comparison with 2019? (ANSPs)

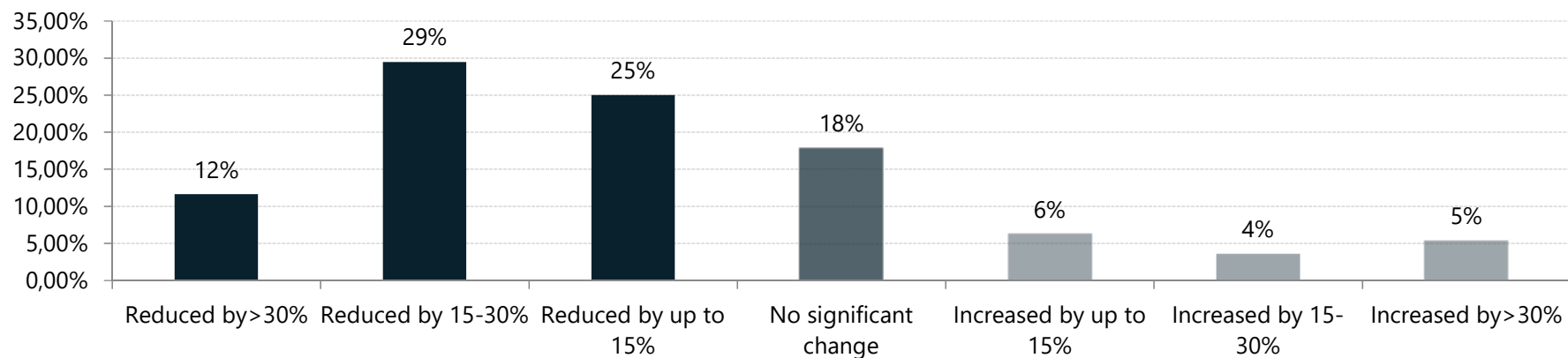


Same question (airports)

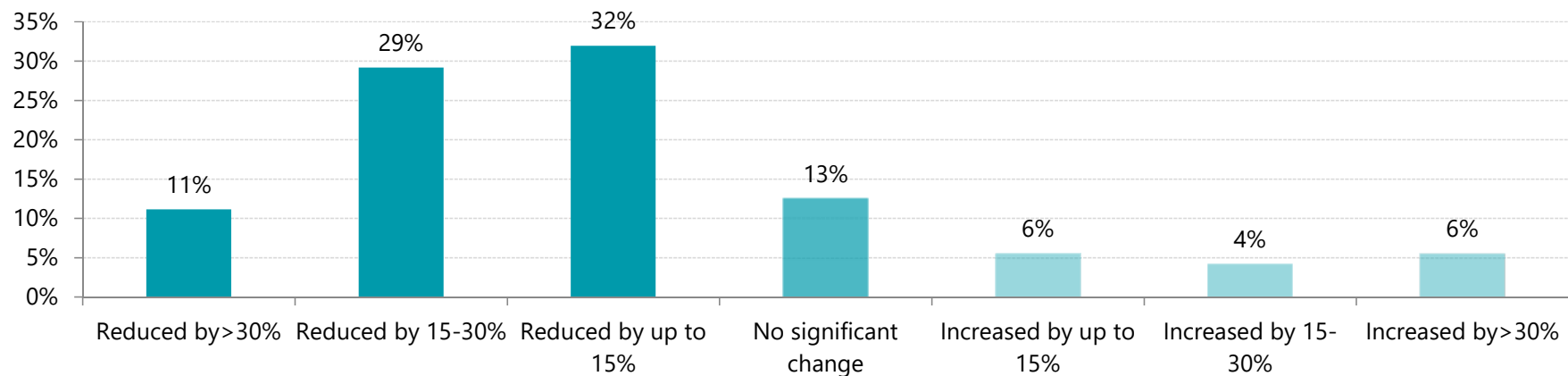


## Impact of the Pandemic - Cost Saving Measures

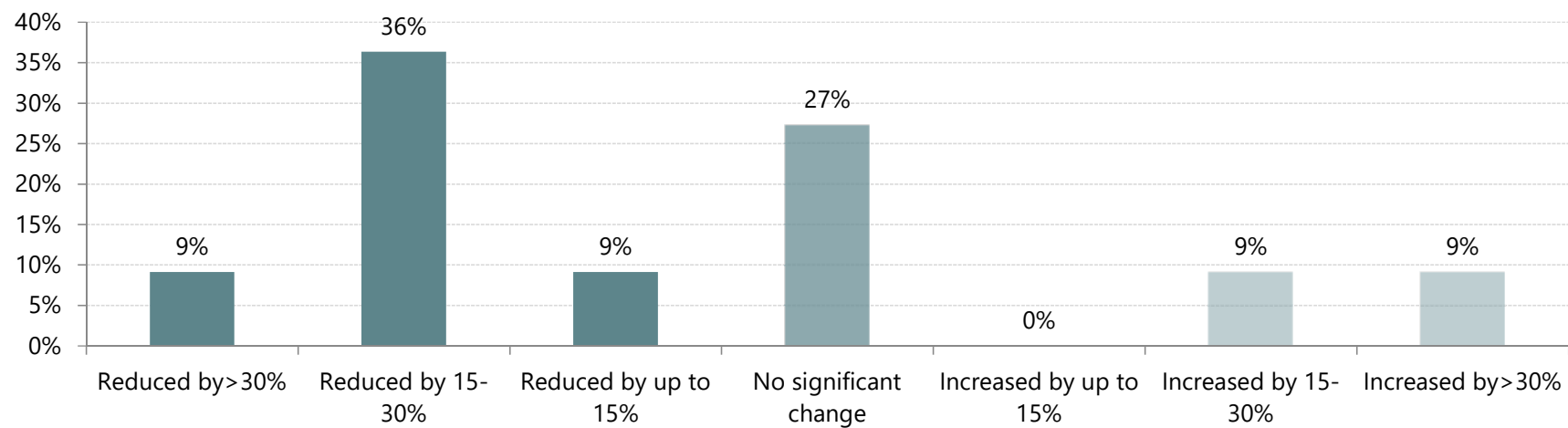
By what magnitude do you expect your total costs to differ in 2020, in comparison with 2019?



Same question (*ANSPs*)

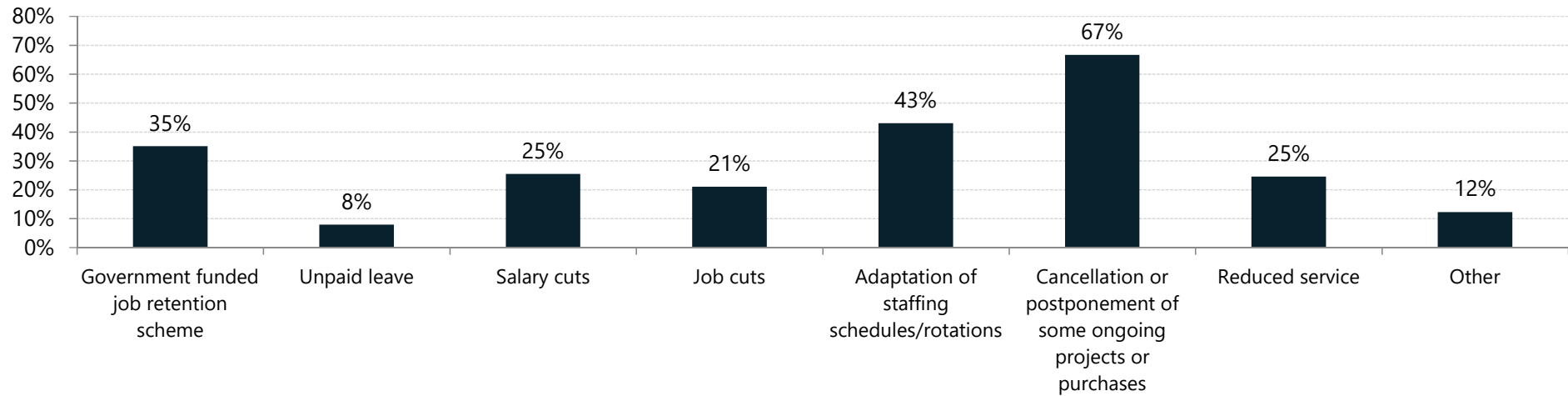


By what magnitude do you expect your total costs to differ in 2020, in comparison with 2019? (airports)

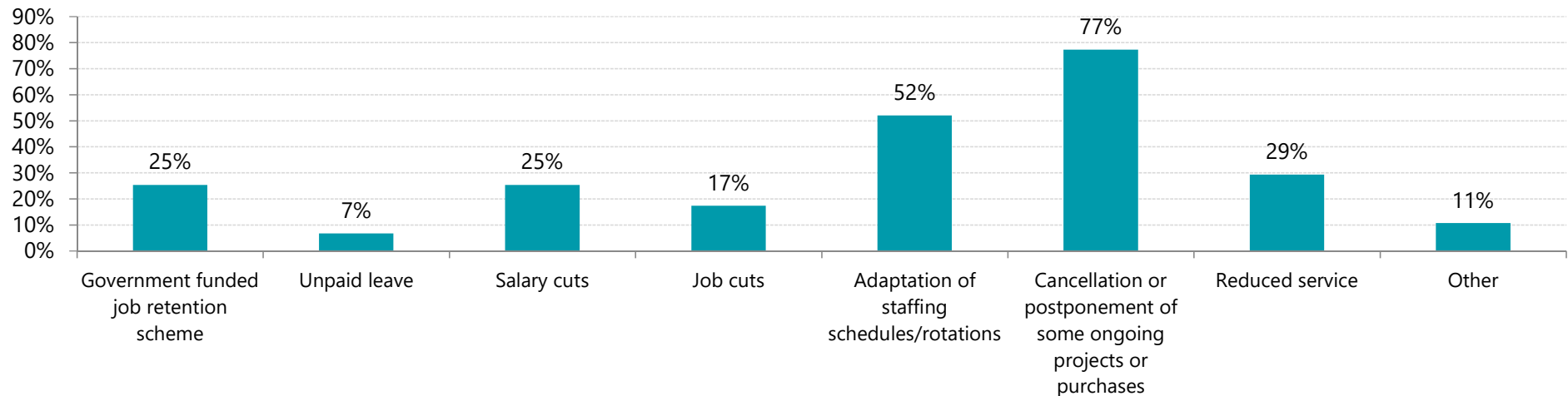




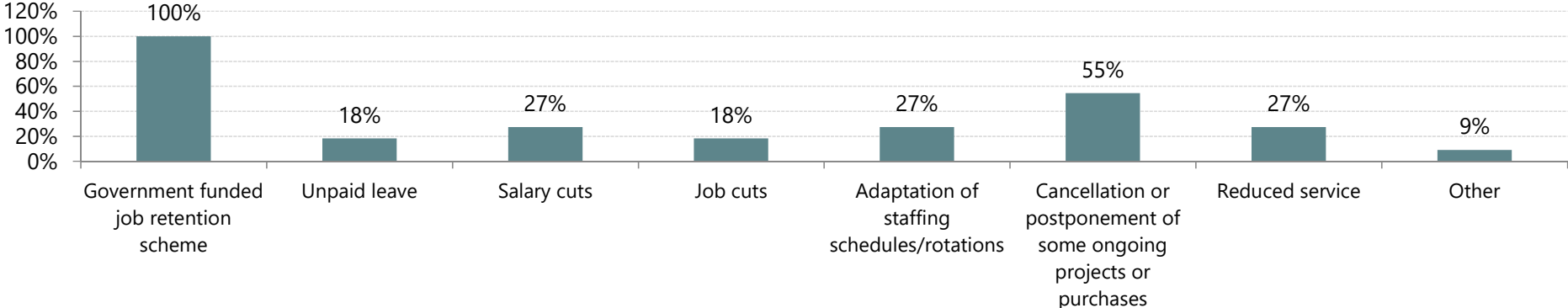
## Cost-saving measures implemented to mitigate the impact of the pandemic



## Same question (ANSPs)

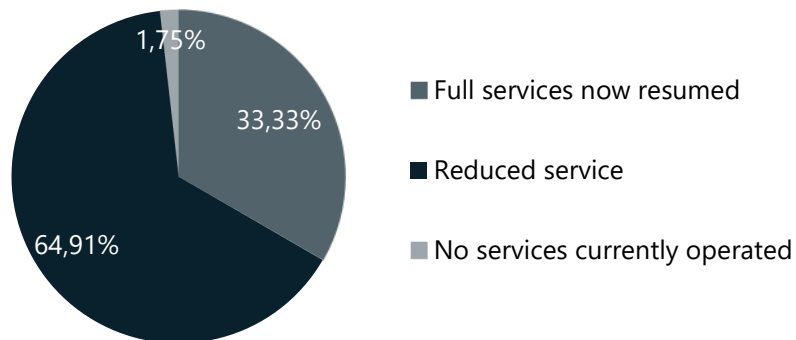


### Cost-saving measures implemented to mitigate the impact of the pandemic *(airports)*

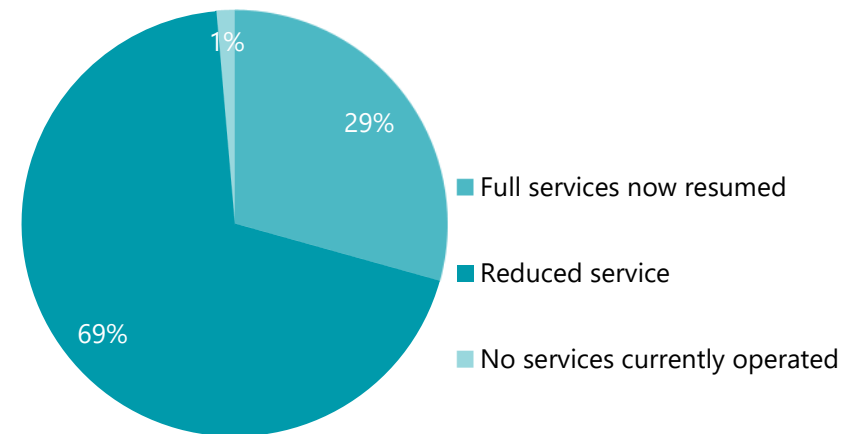


## Impact of the Pandemic - Operational Impacts

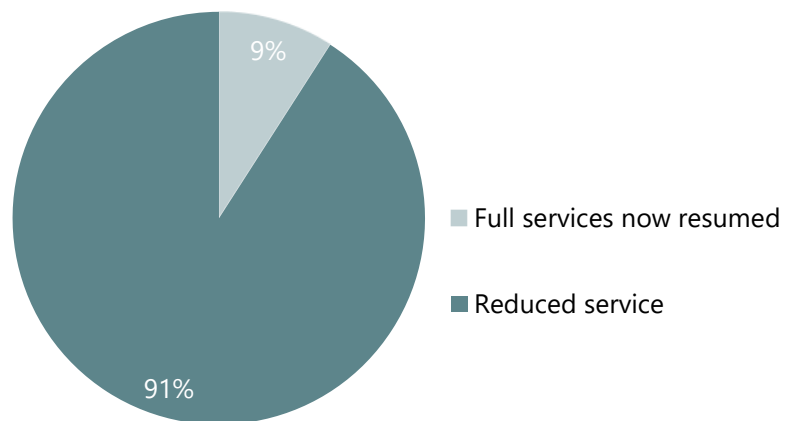
Compared to pre-pandemic levels, at what level is your organisation currently operating?



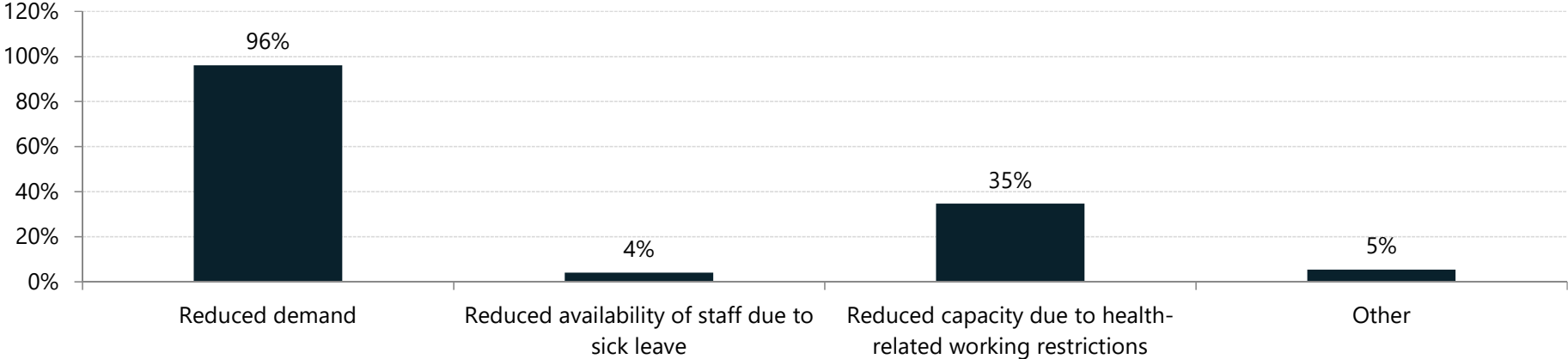
Same question (ANSPs)



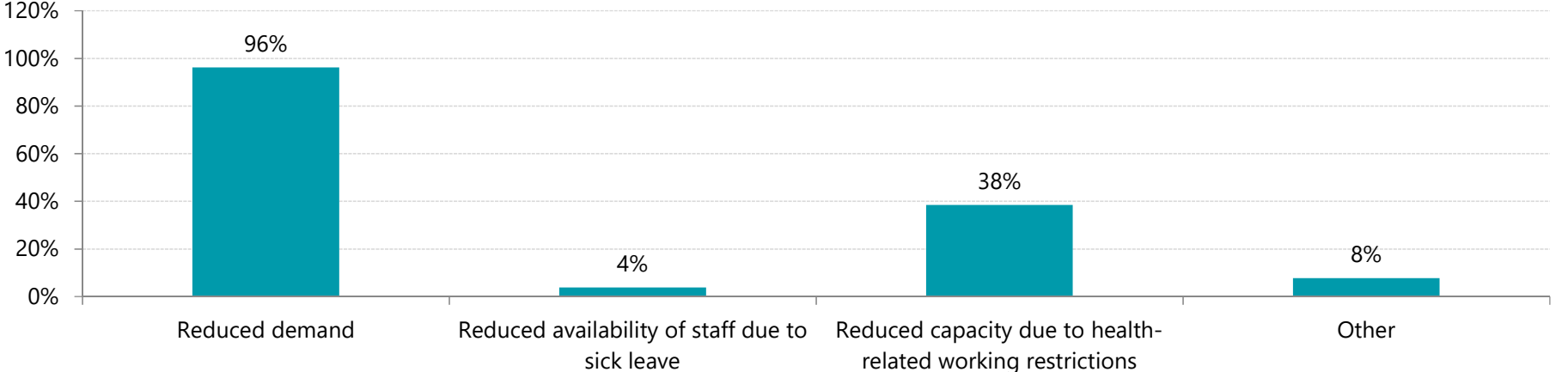
Same question (airports)



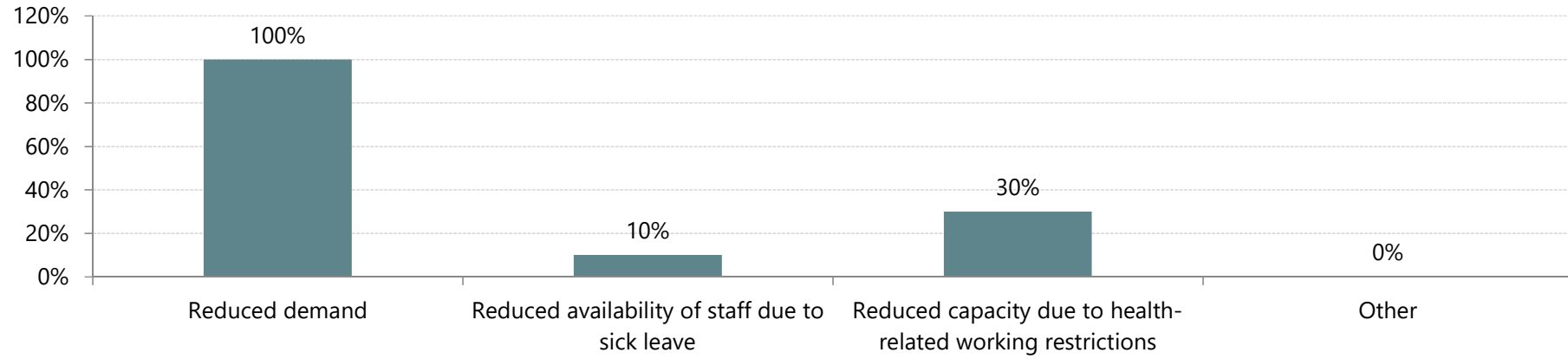
### What are the main reasons for reduced services?



### Same question (ANSPs)



## What are the main reasons for reduced services? (airports)

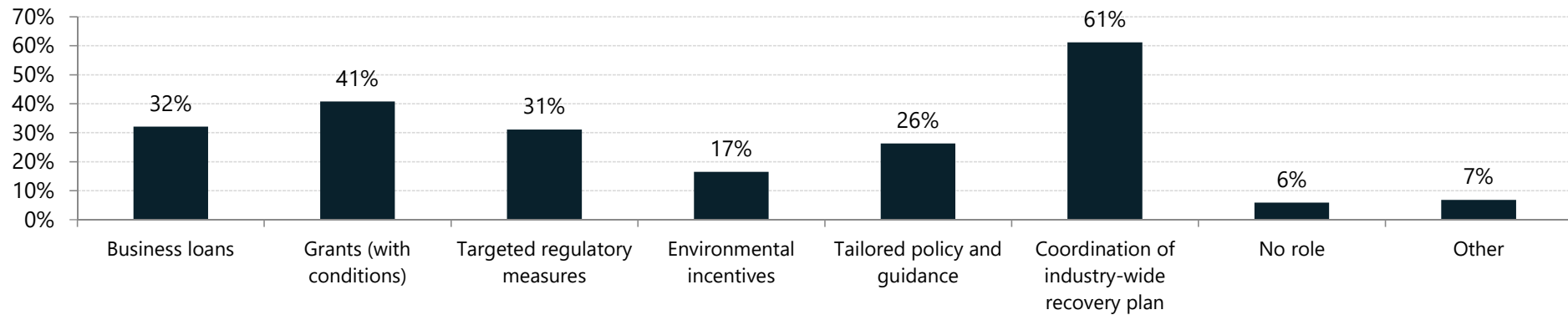


# THE RECOVERY

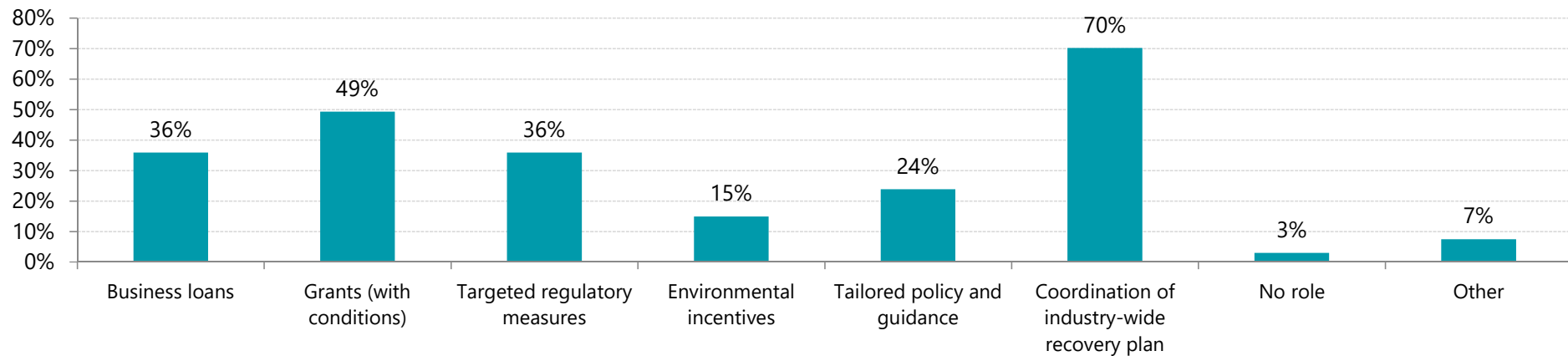


## The Recovery - Role of the State

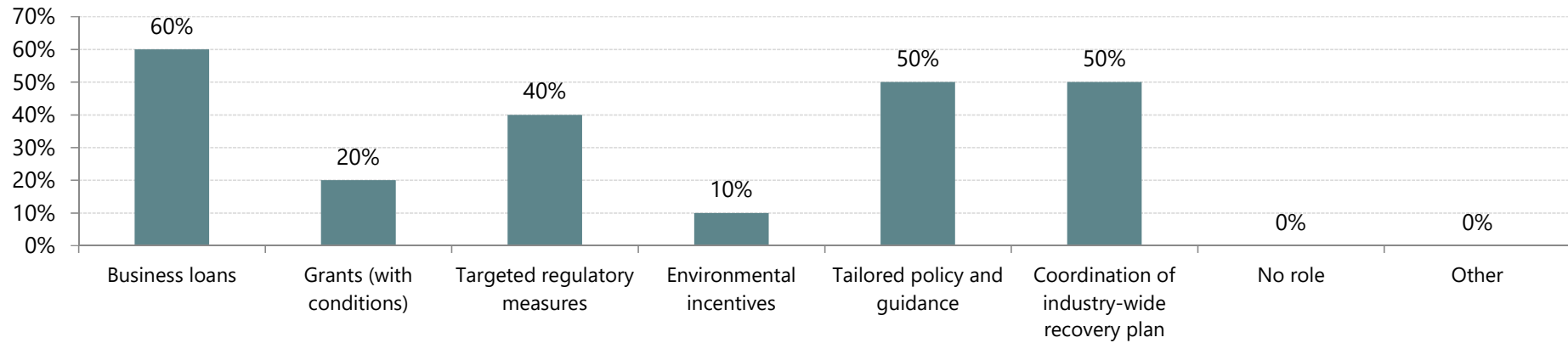
What role(s) should states take in supporting the recovery of your organisation?



Same question (ANSPs)



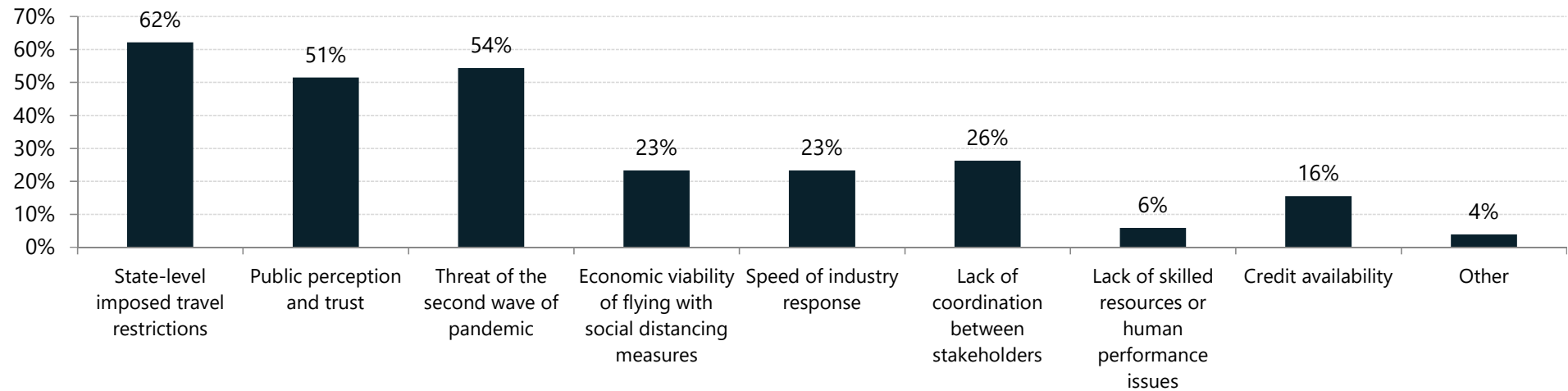
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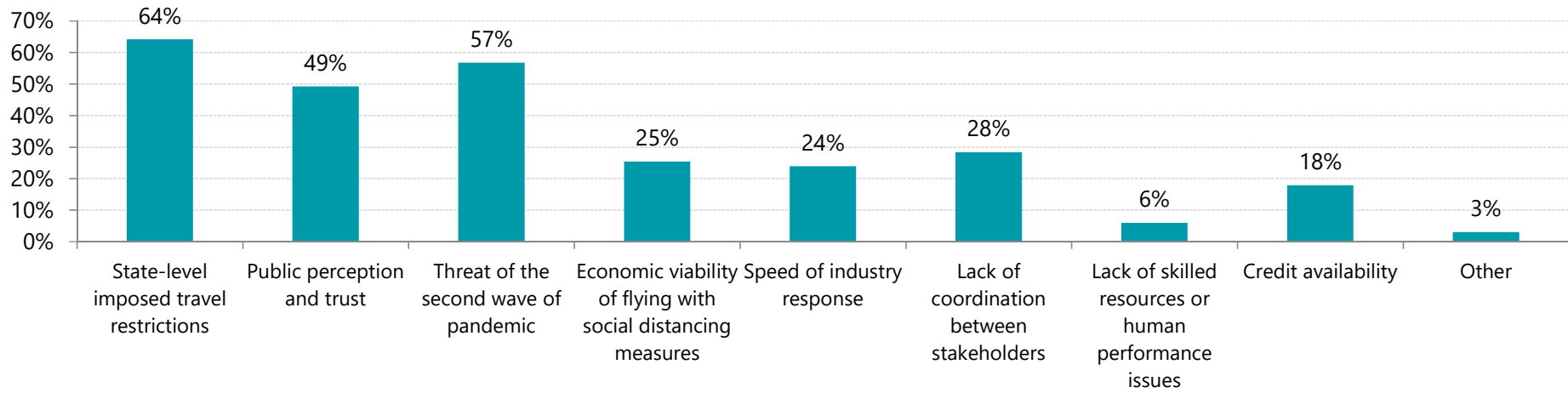


## The Recovery - Risk Factors

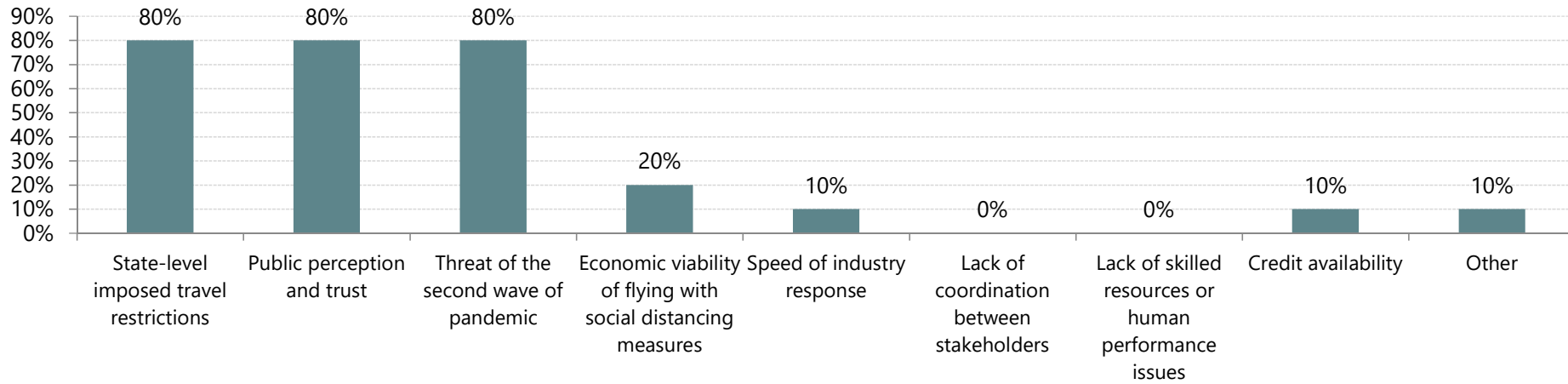
Which factors do you feel pose the greatest risk to your organisation's recovery?



### Which factors do you feel pose the greatest risk to your organisation's recovery? (ANSPs)

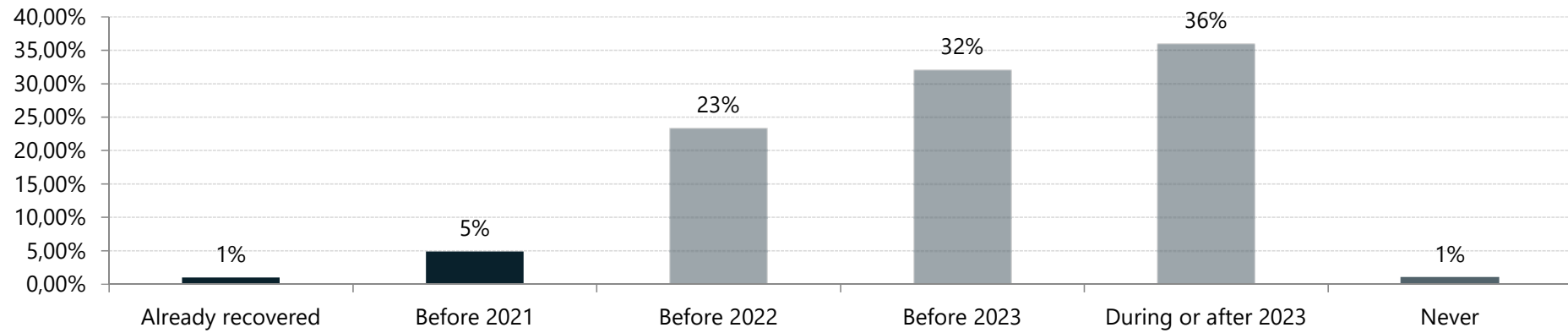


### Same question (airports)

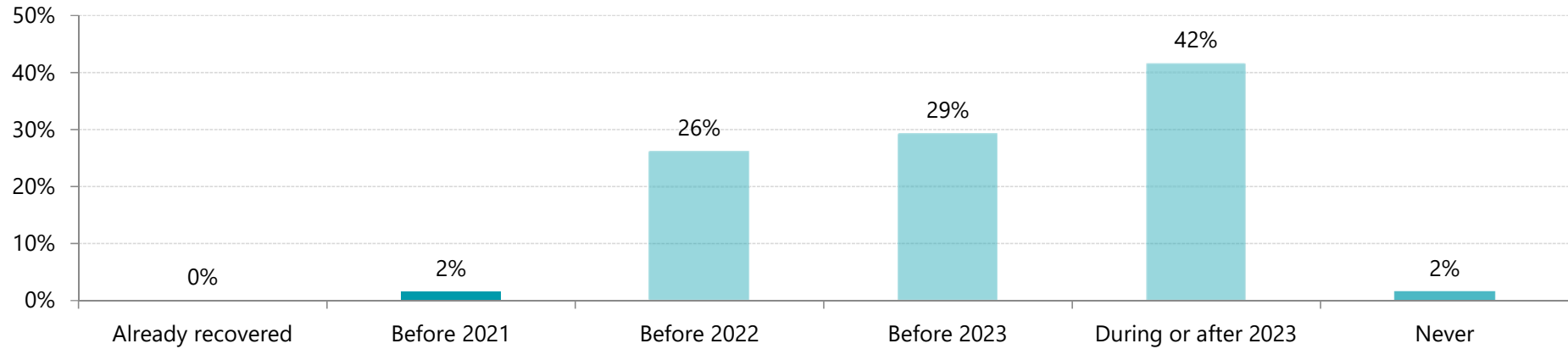


## The Recovery - Timescales

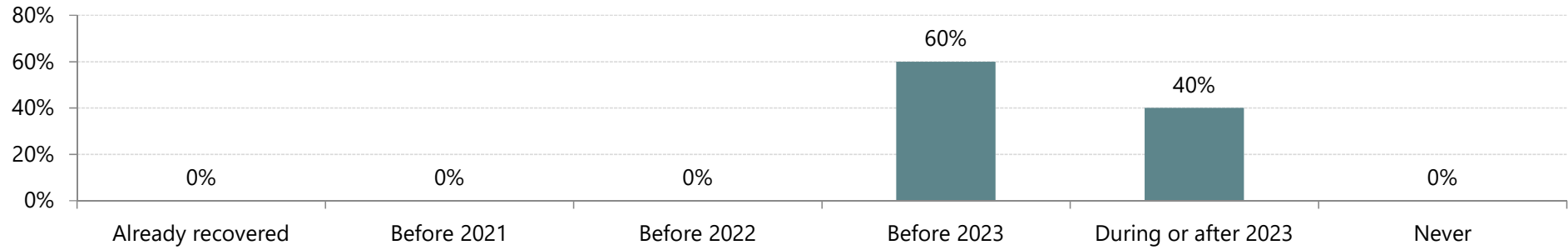
By when does your organisation envisage company revenues returning to pre-pandemic conditions?



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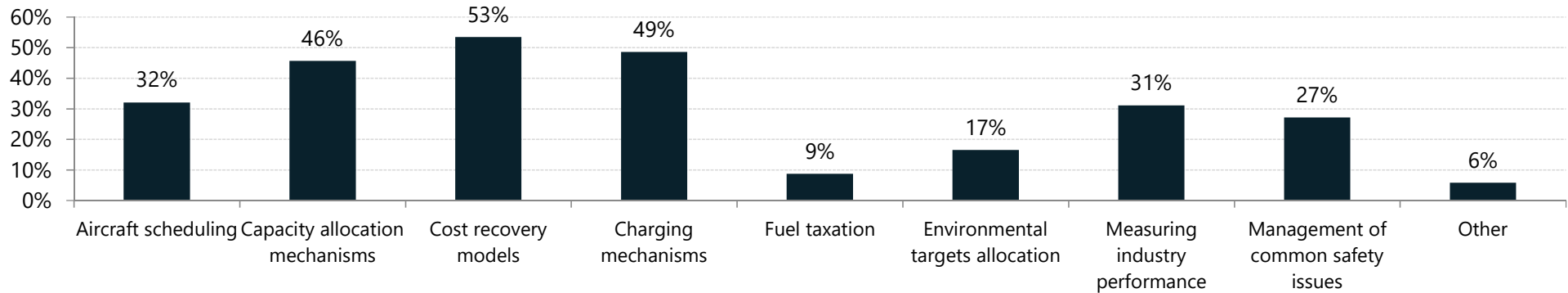


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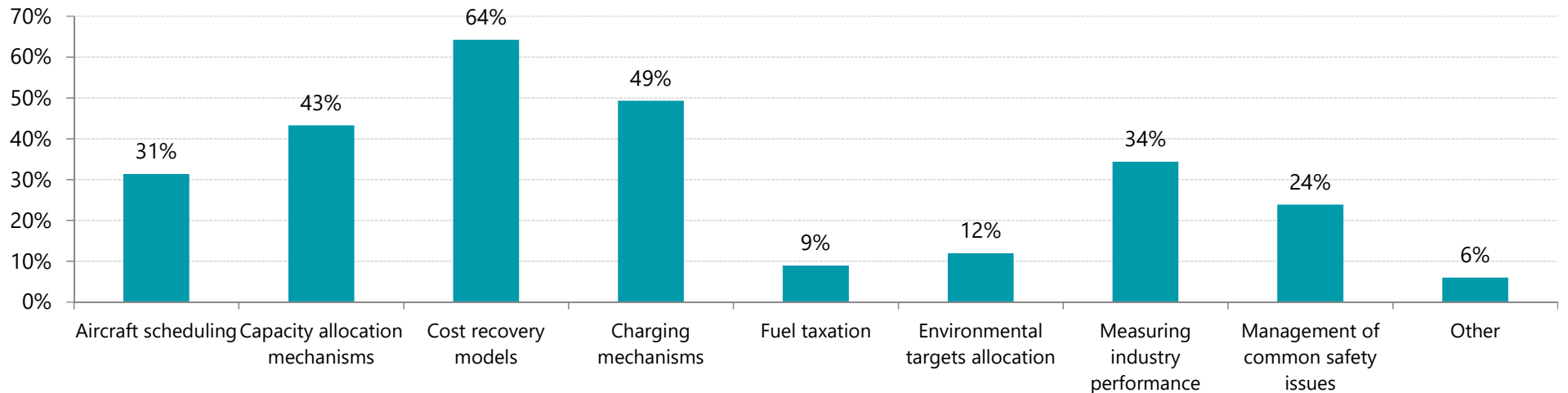


## The Recovery - Changing Plans

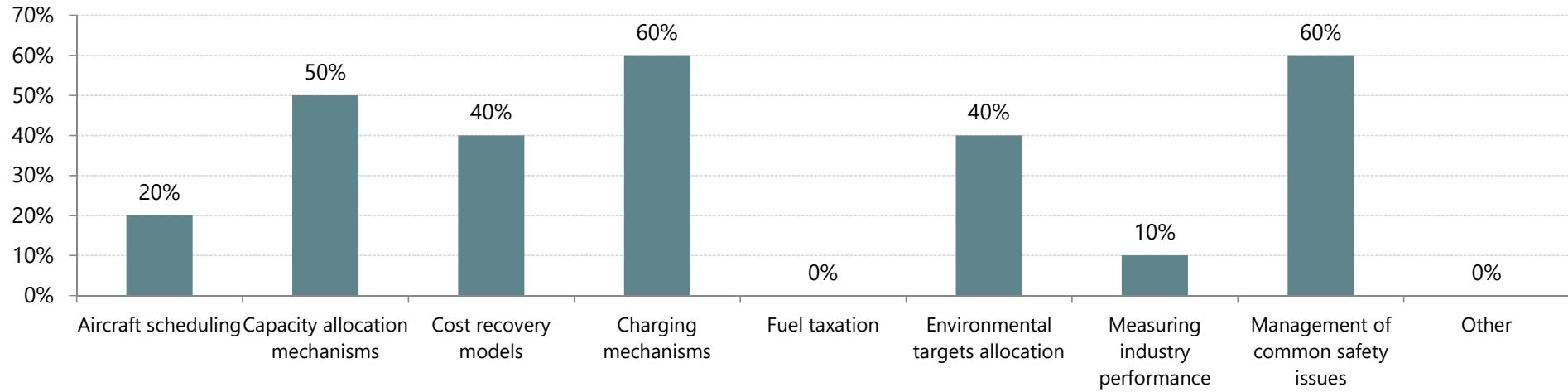
What areas of collaboration between ANSPs, airlines and airports may need to be revisited as a priority in light of the pandemic?



Same question (*ANSPs*)

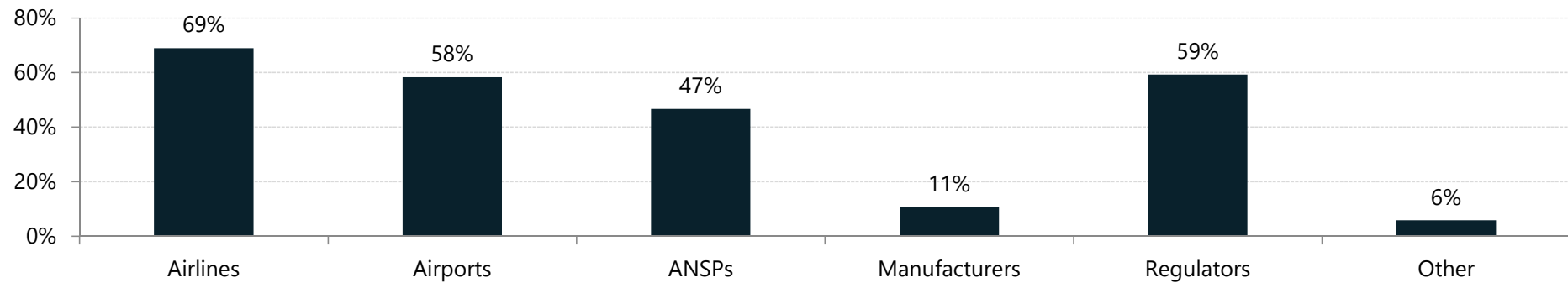


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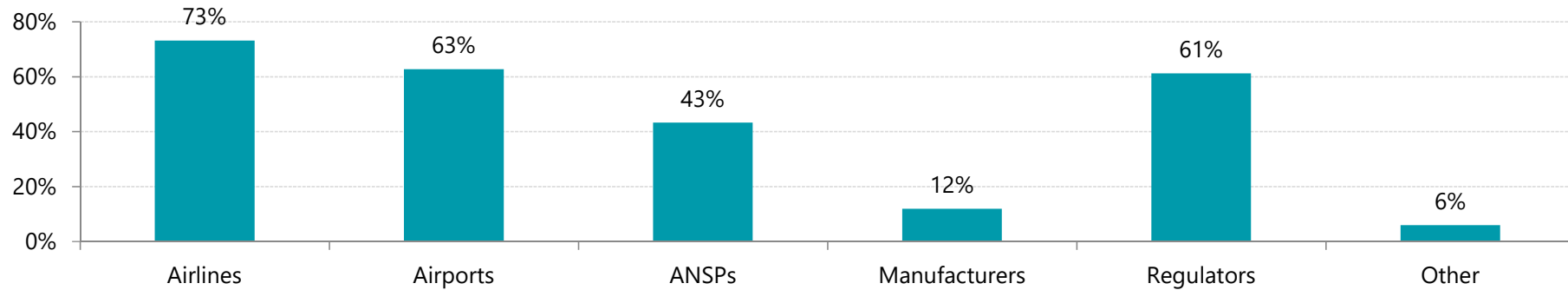
## The Recovery - Finding partners and collaborators

With which type(s) of organisations within the aviation industry do the clearest opportunities for your organisation to collaborate exist, to promote recovery and increase resilience to future shocks?

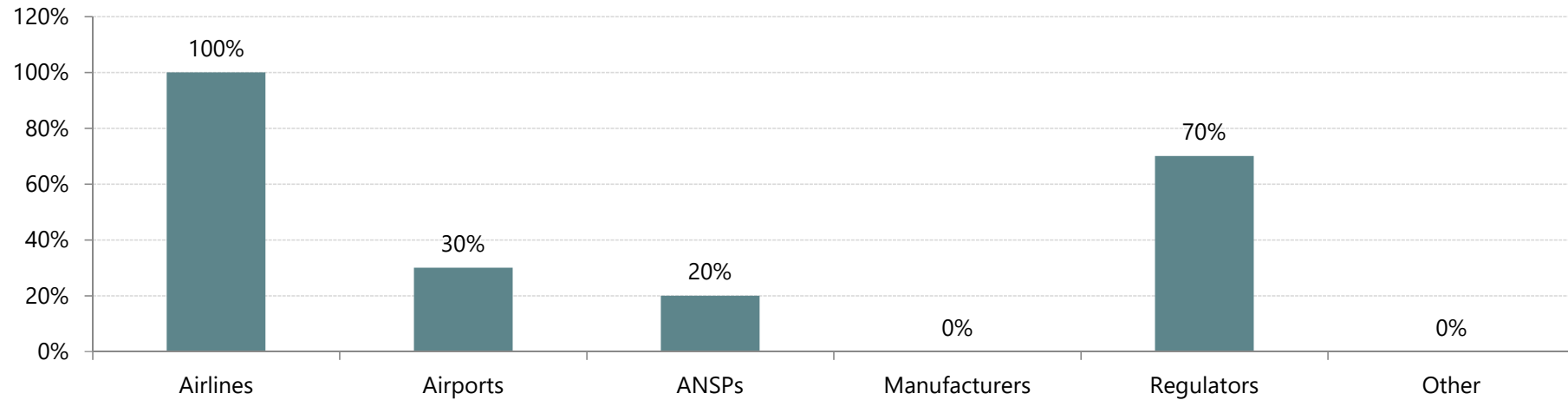




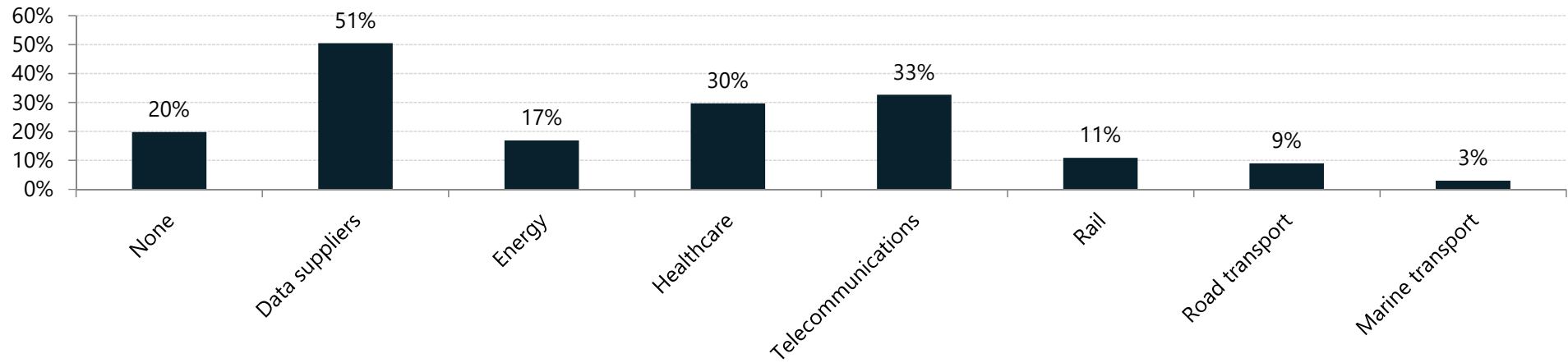
With which type(s) of organisations within the aviation industry do the clearest opportunities for your organisation to collaborate exist, to promote recovery and increase resilience to future shocks? (ANSPs)



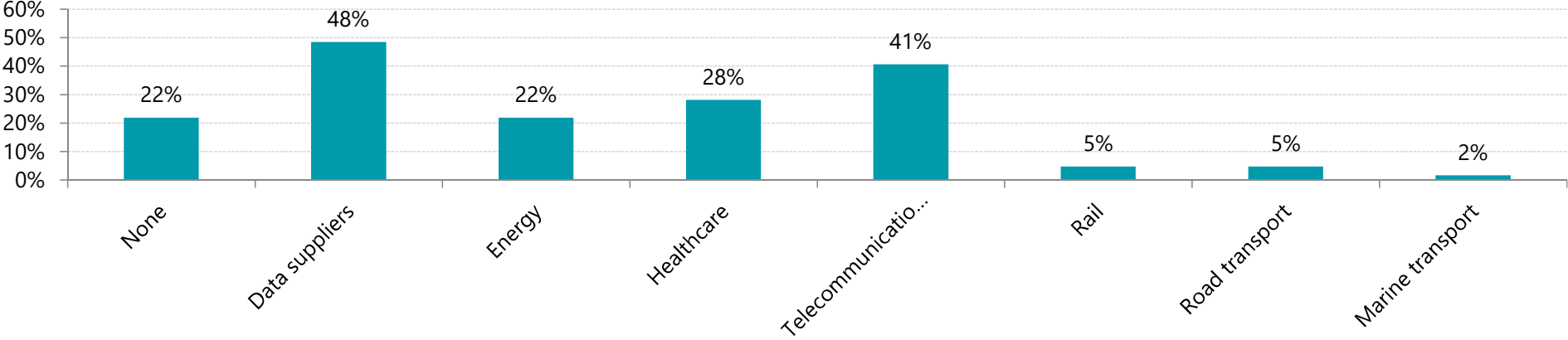
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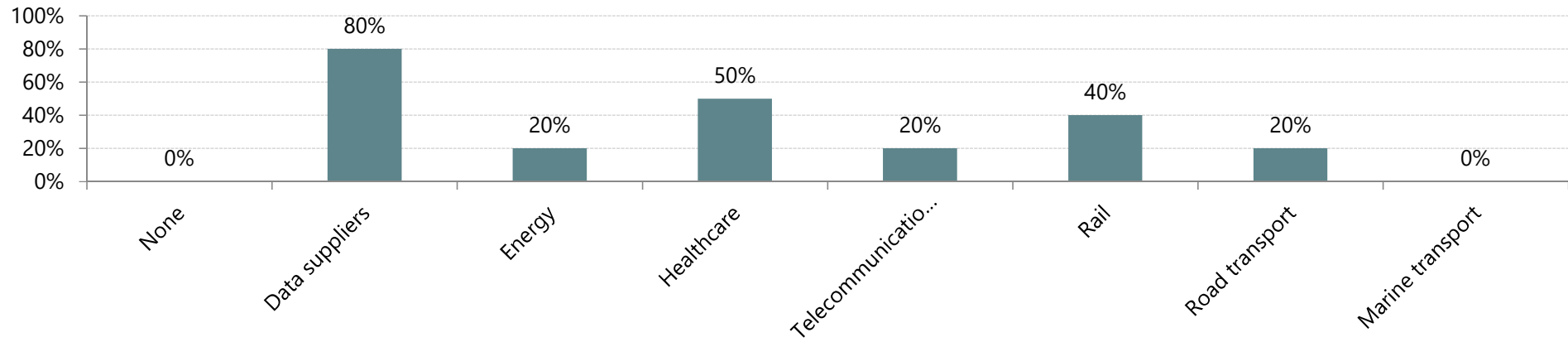
With which type(s) of organisations outside the aviation industry do the clearest opportunities for your organisation to collaborate exist, to promote recovery and increase resilience to future shocks?



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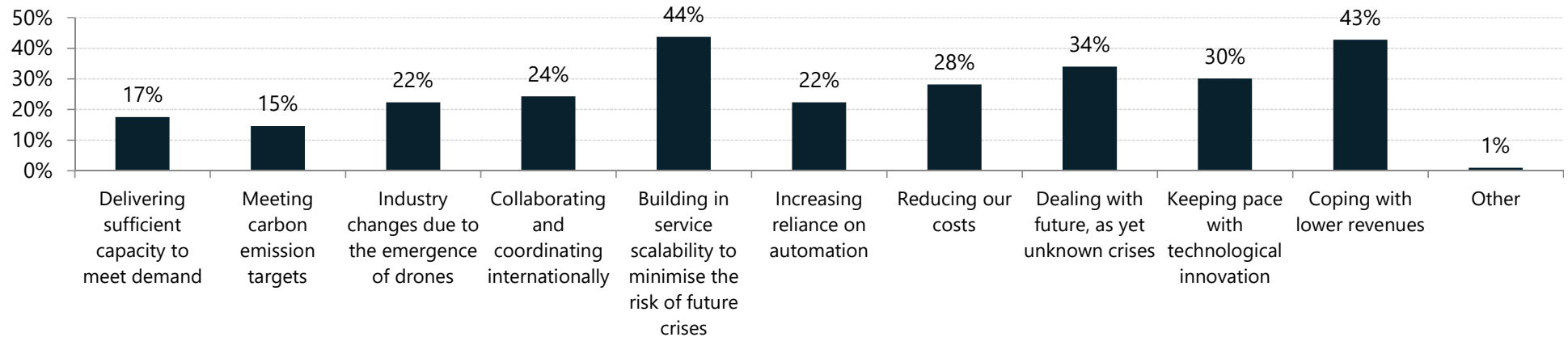


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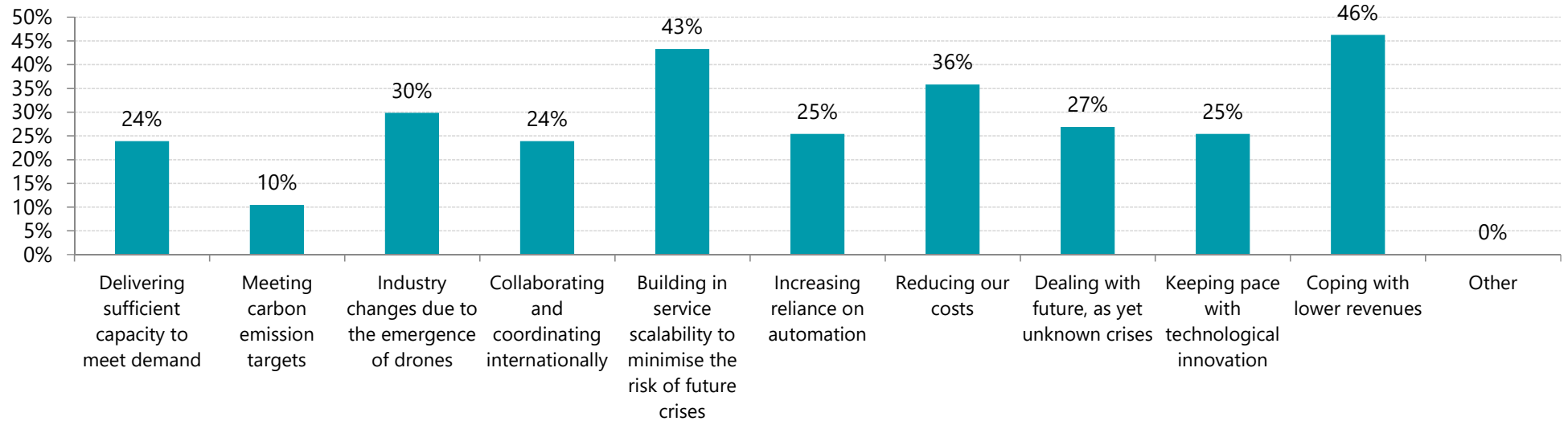


## Challenges and Opportunities

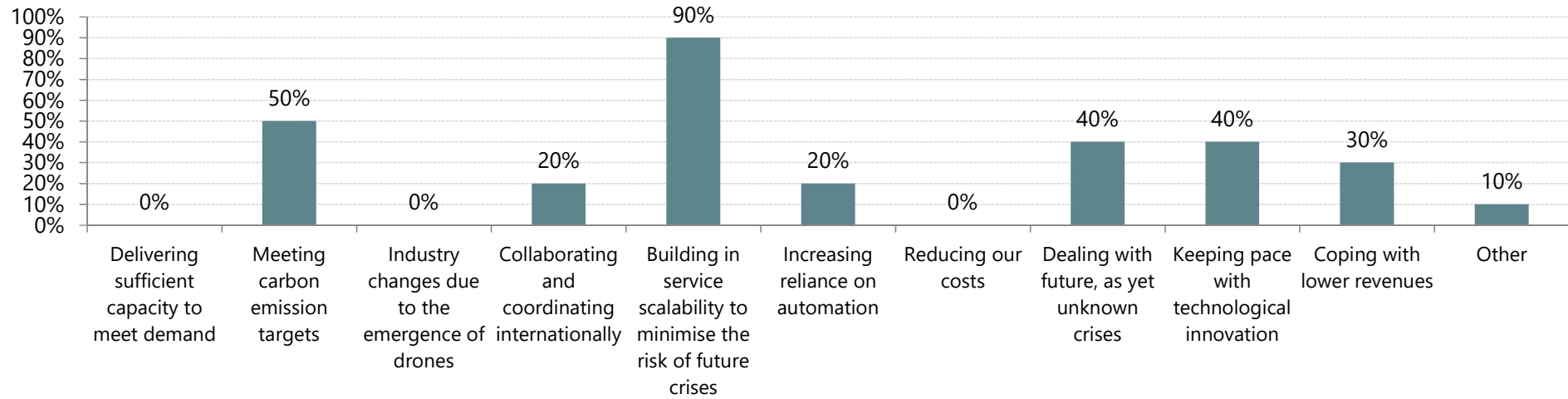
Looking into the future, what are the top 3 challenges you think that your business will face from now until 2030?



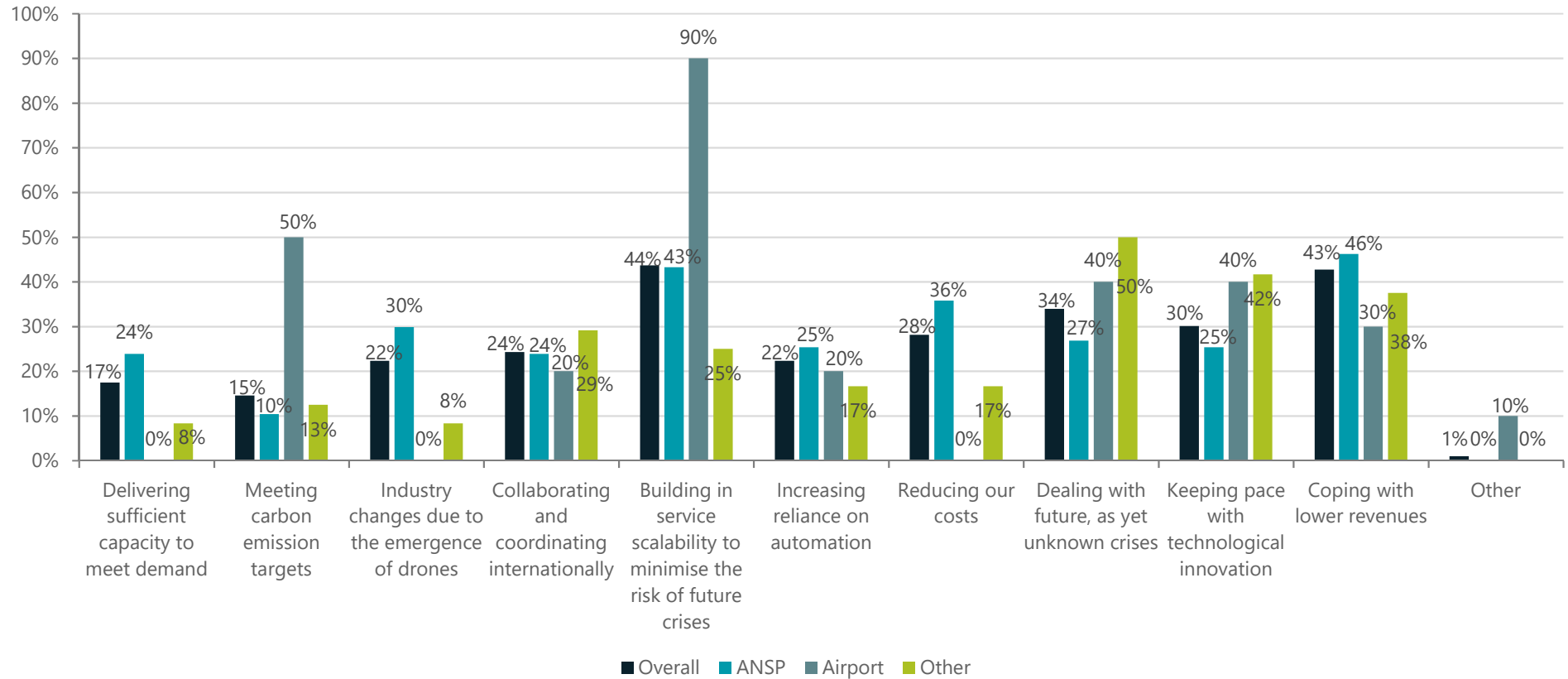
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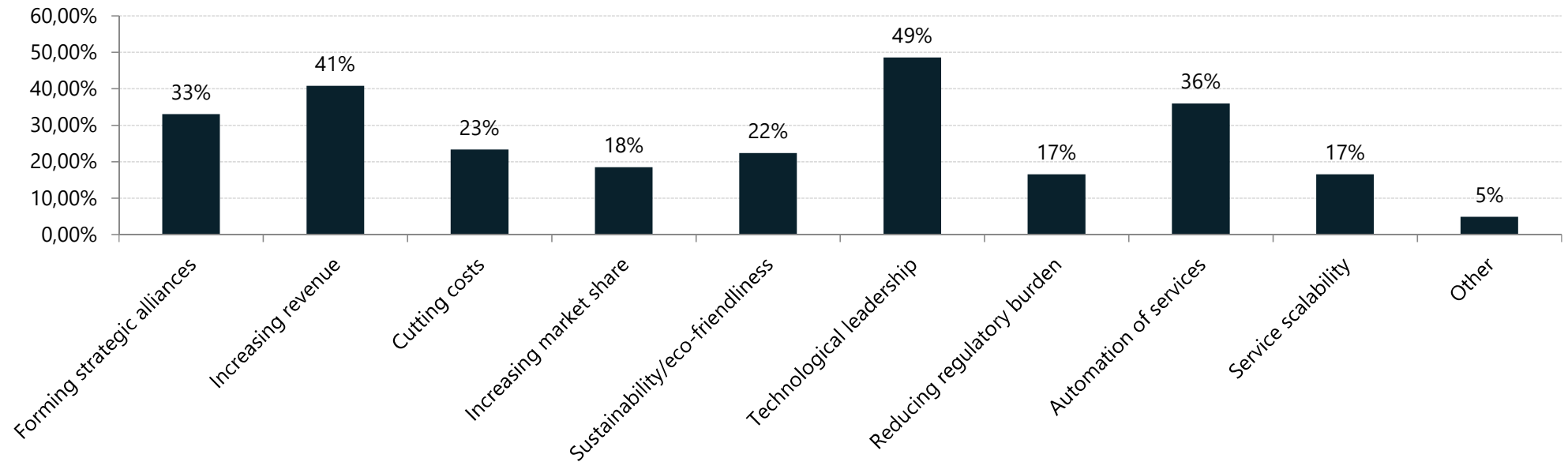




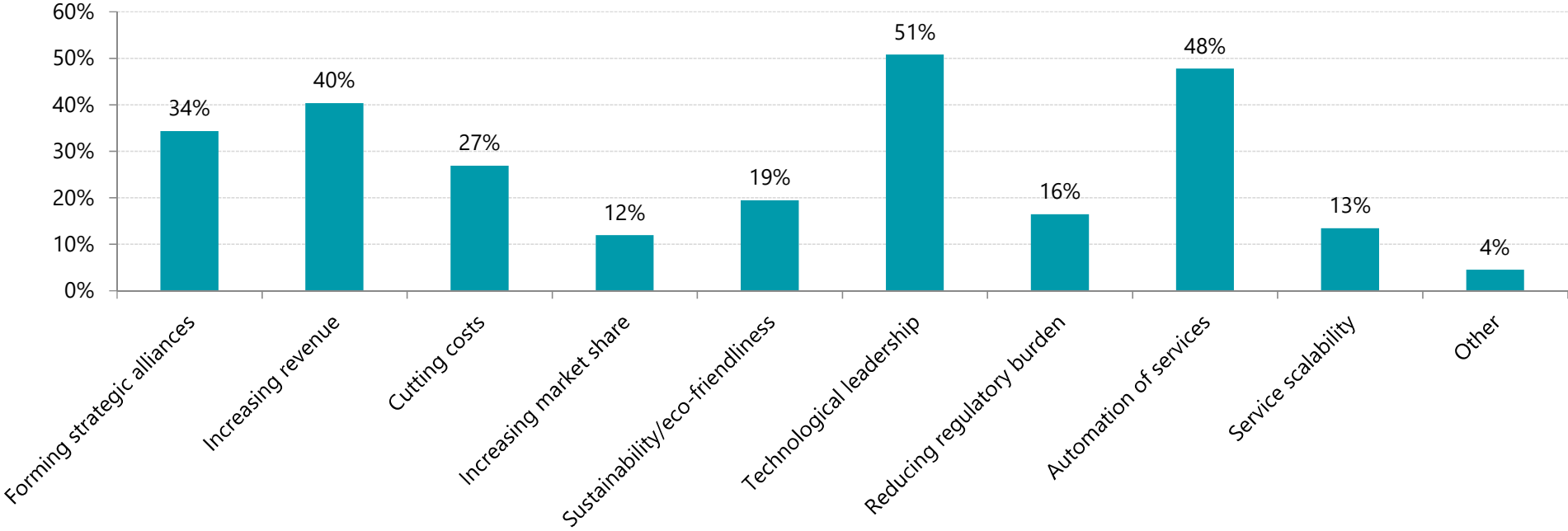


## A Shift in Priorities - Before the Pandemic

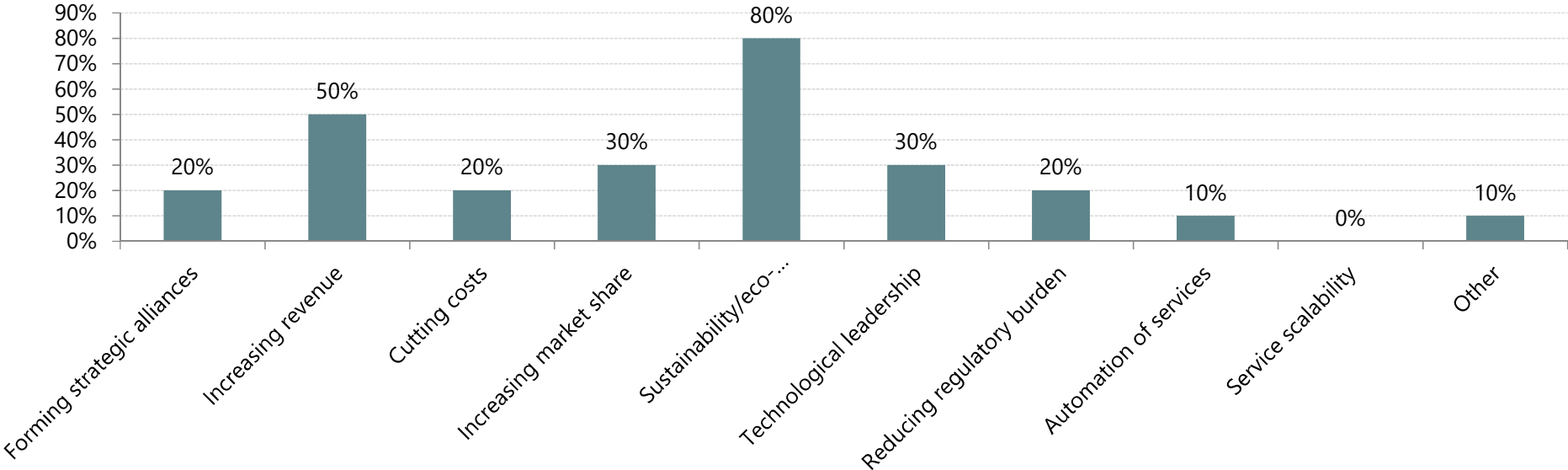
Other than safety, what were your company's highest strategic priorities before the pandemic?



Other than safety, what were your company's highest strategic priorities before the pandemic? (ANSPs)

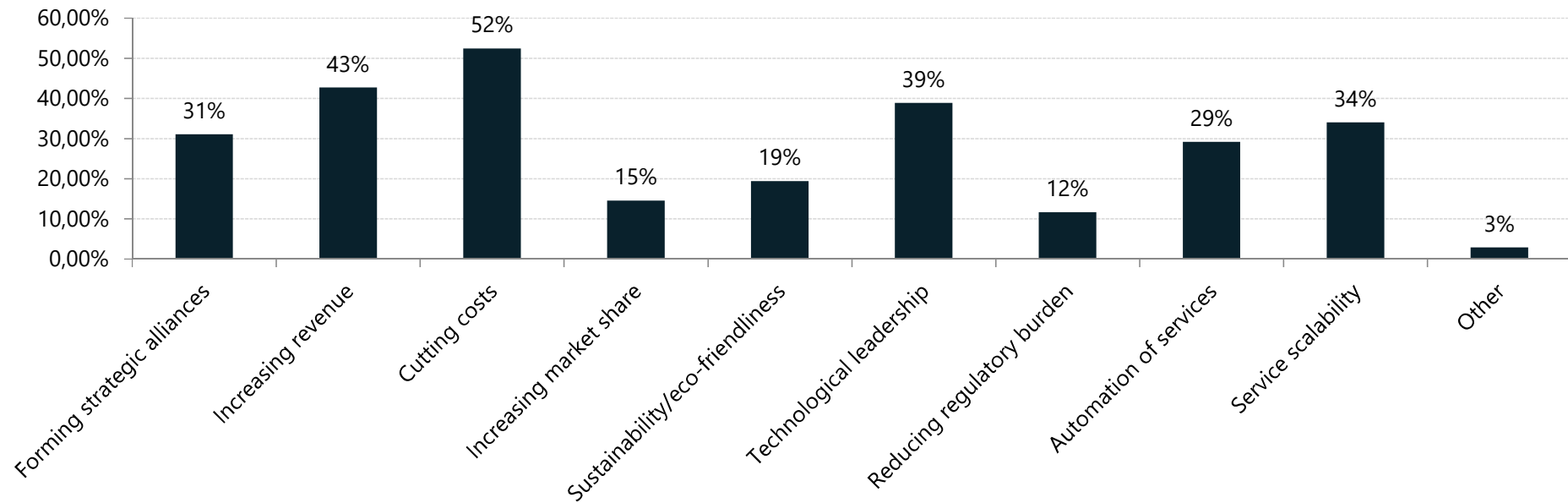


Other than safety, what were your company's highest strategic priorities before the pandemic? (airports)

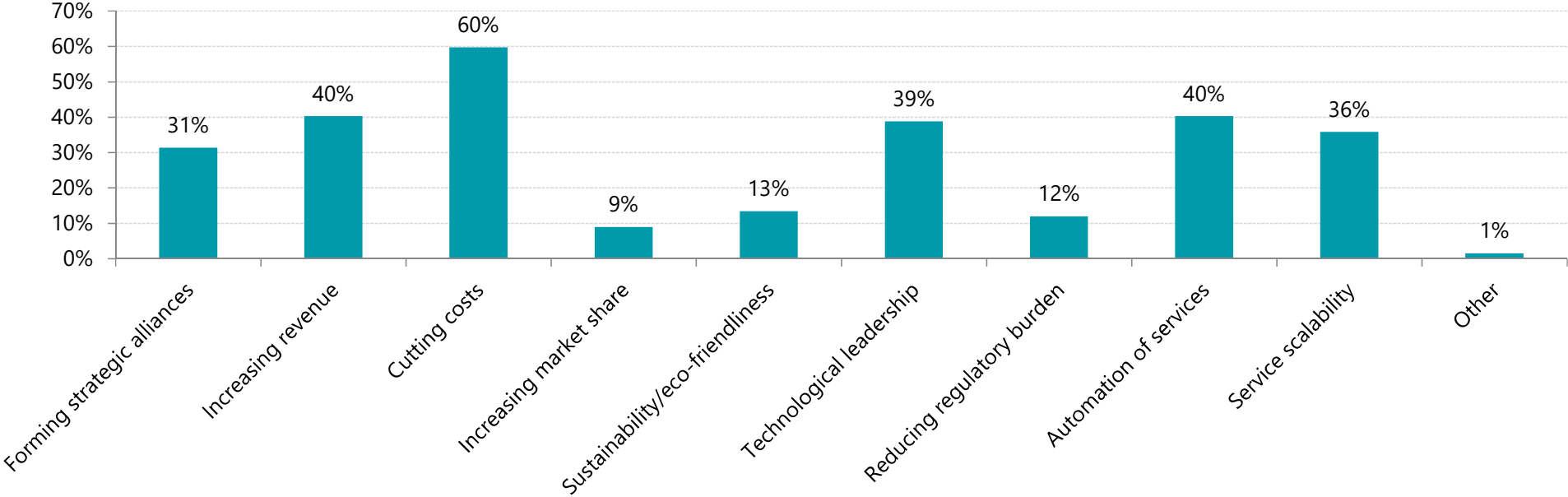


## A Shift in Priorities - After the Pandemic

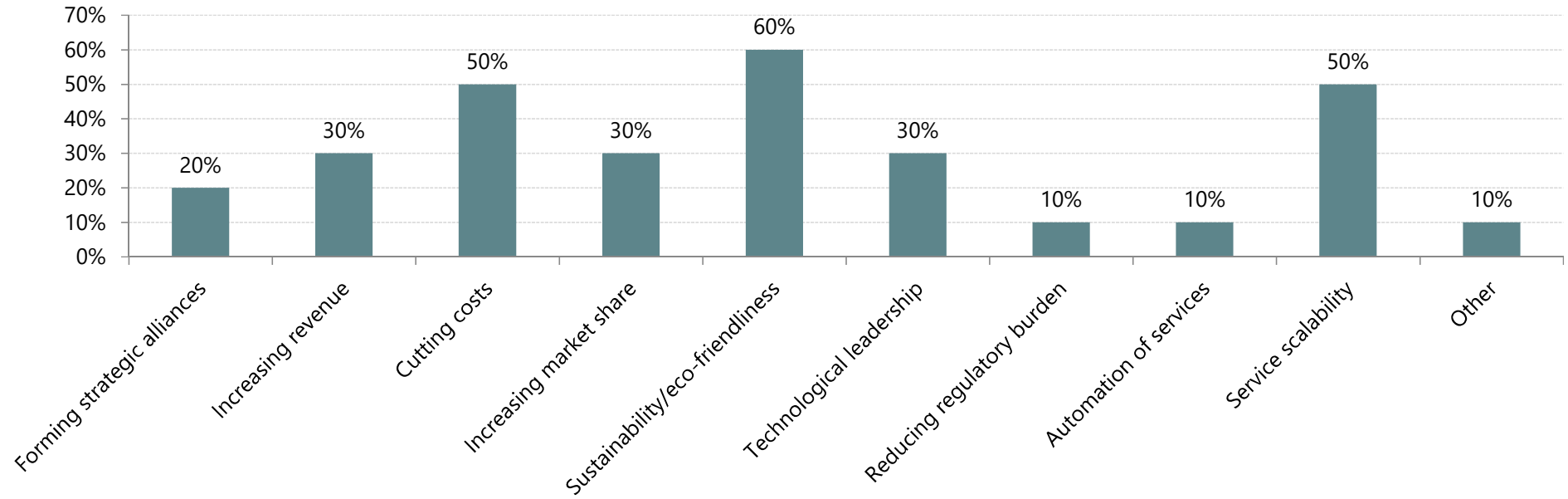
Other than safety, what are your company's highest strategic priorities likely to be after the pandemic?



Other than safety, what are your company's highest strategic priorities likely to be after the pandemic? (ANSPPs)

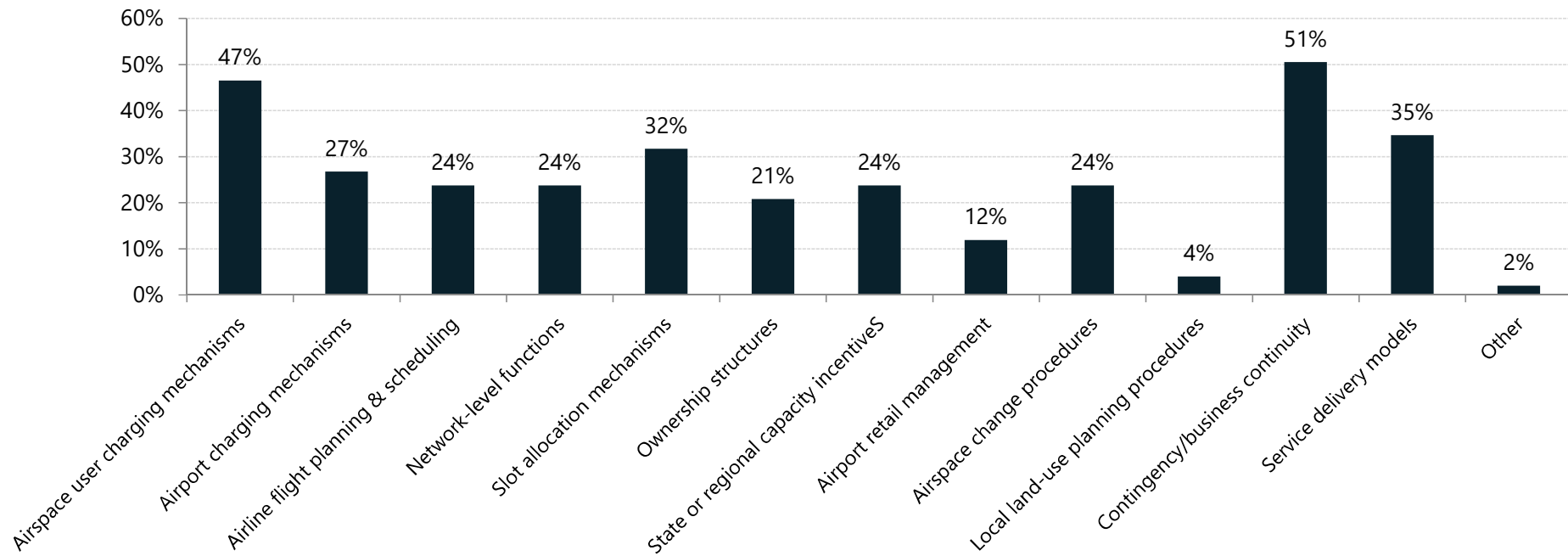


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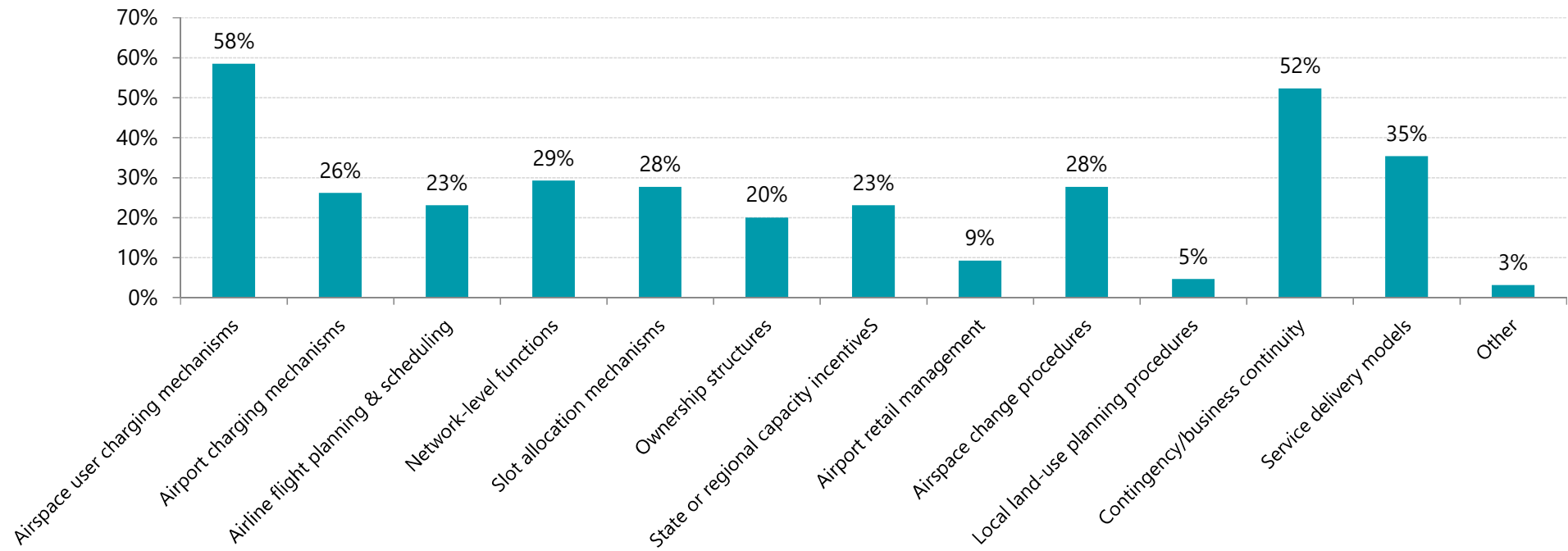
## A Shift in Priorities - Targets for Reform

After the pandemic, which elements of the industry will need significant reform?

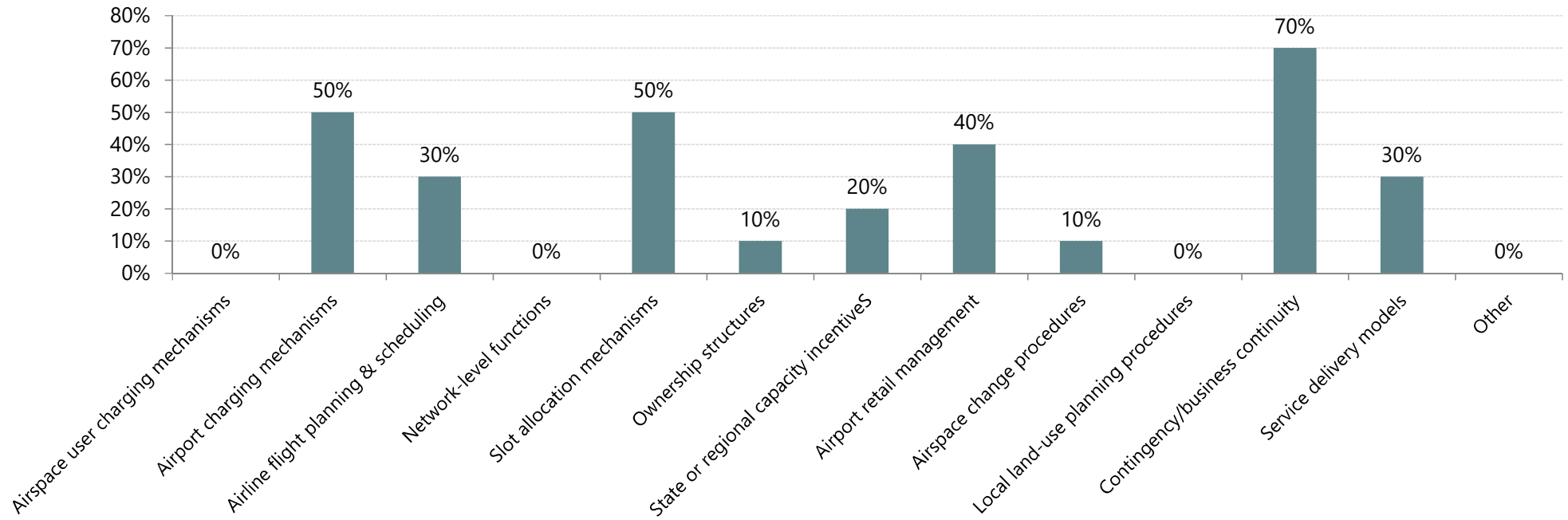




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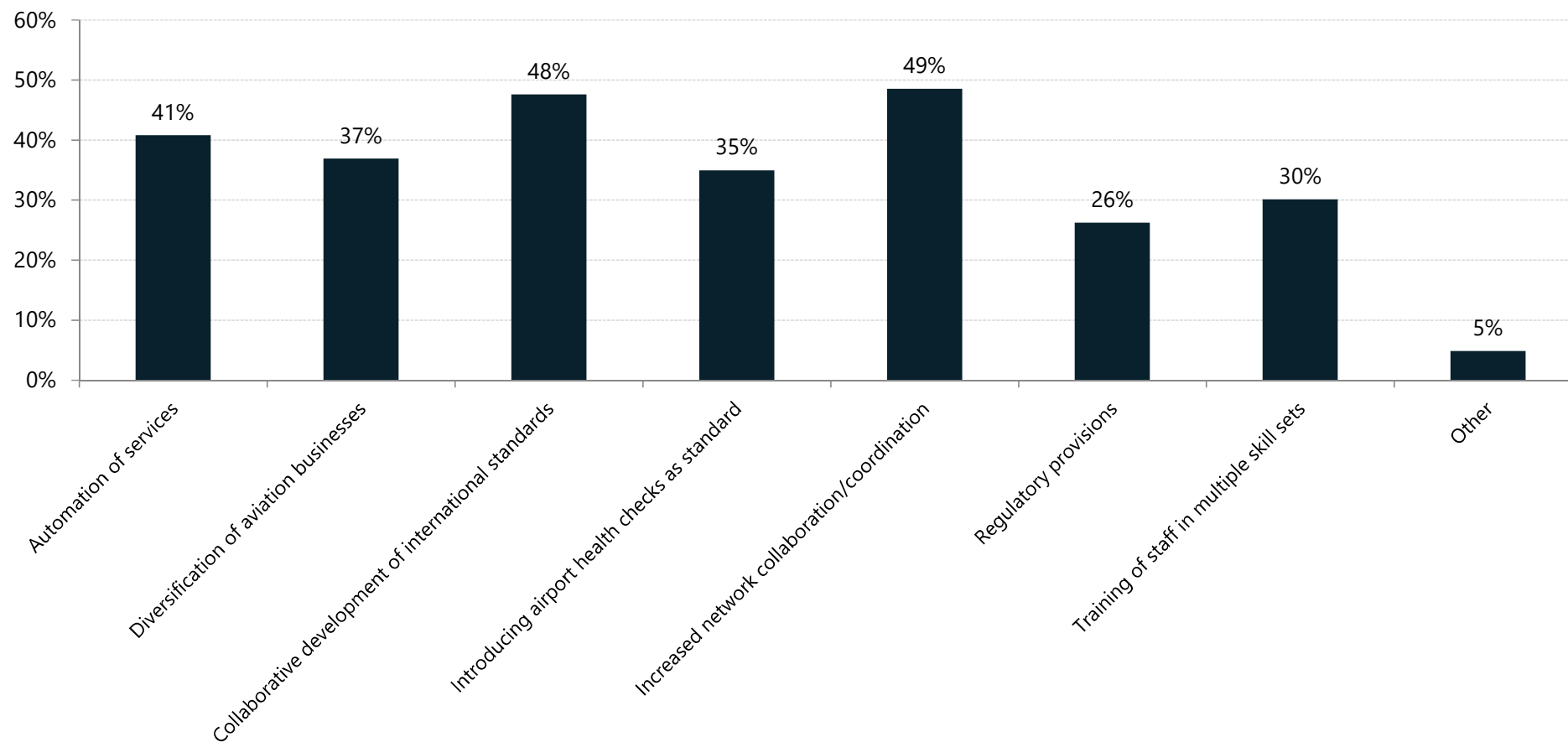


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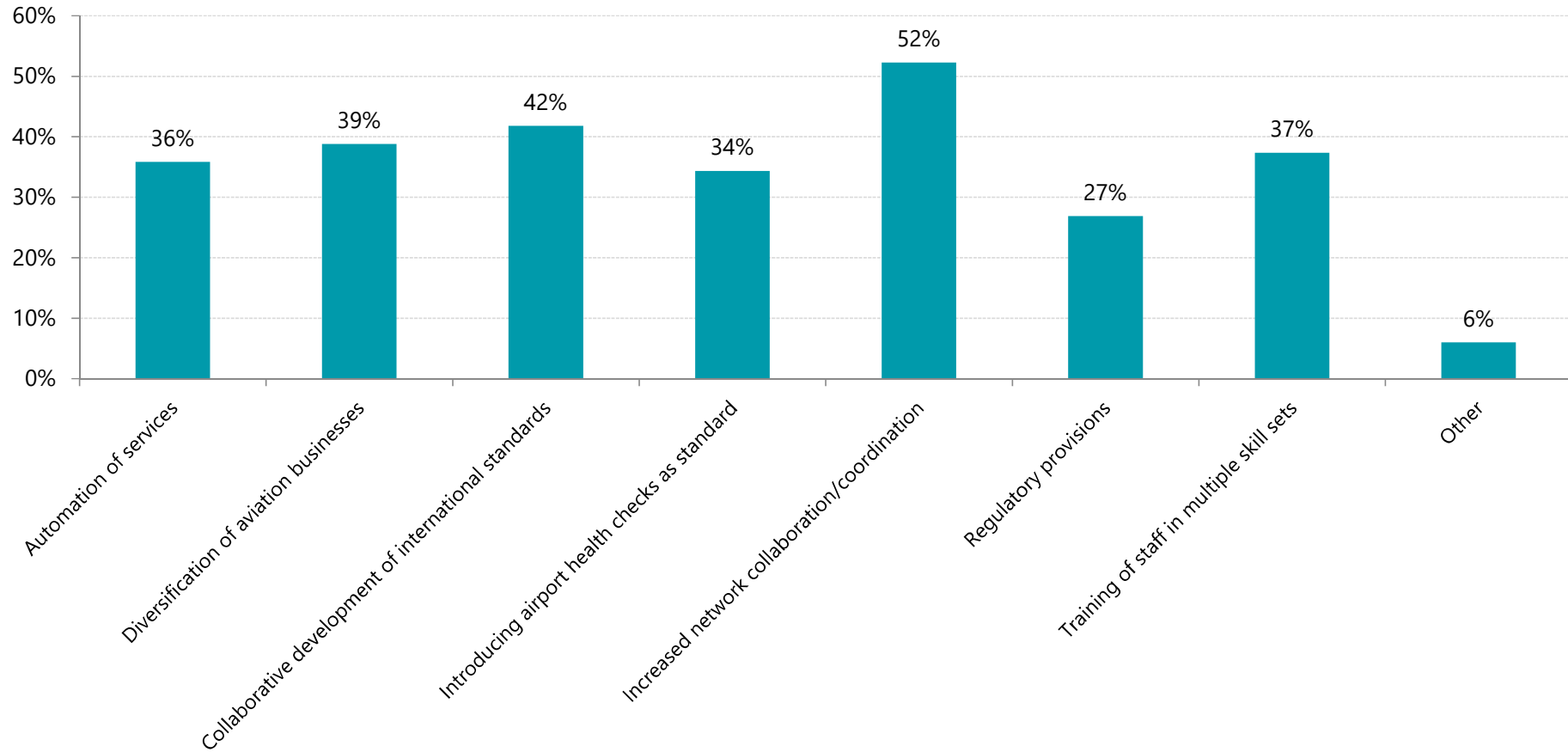


## A Shift in Priorities - Finding Resilience

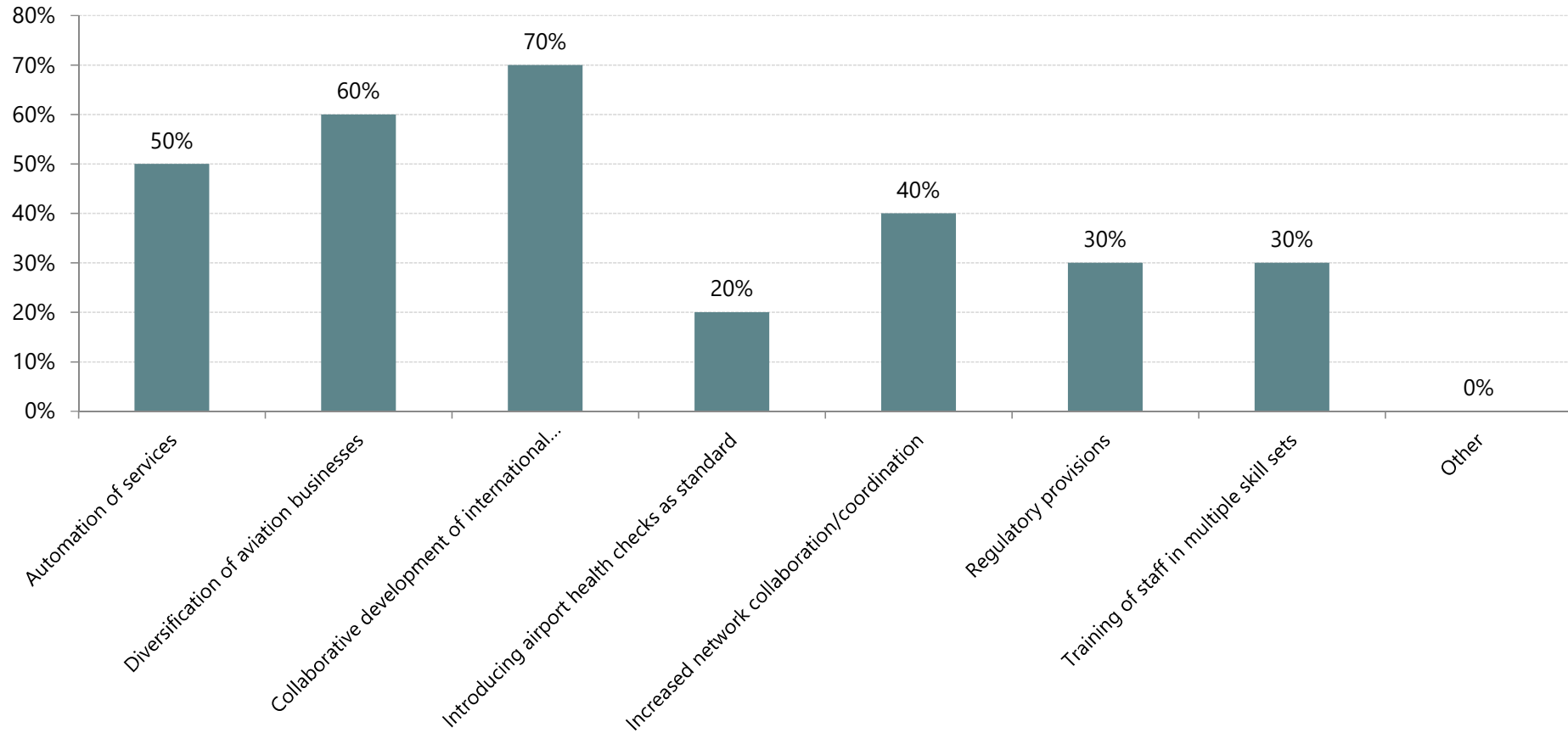
In your opinion, how can the industry as a whole better respond to similar crises and traffic downturns in the future?



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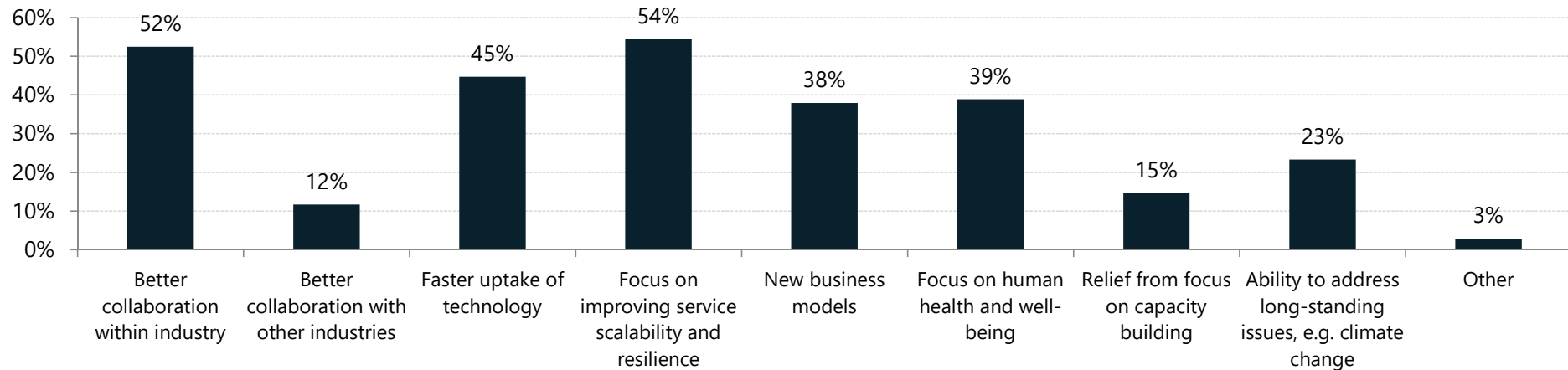


In your opinion, how can the industry as a whole better respond to similar crises and traffic downturns in the future? (airports)

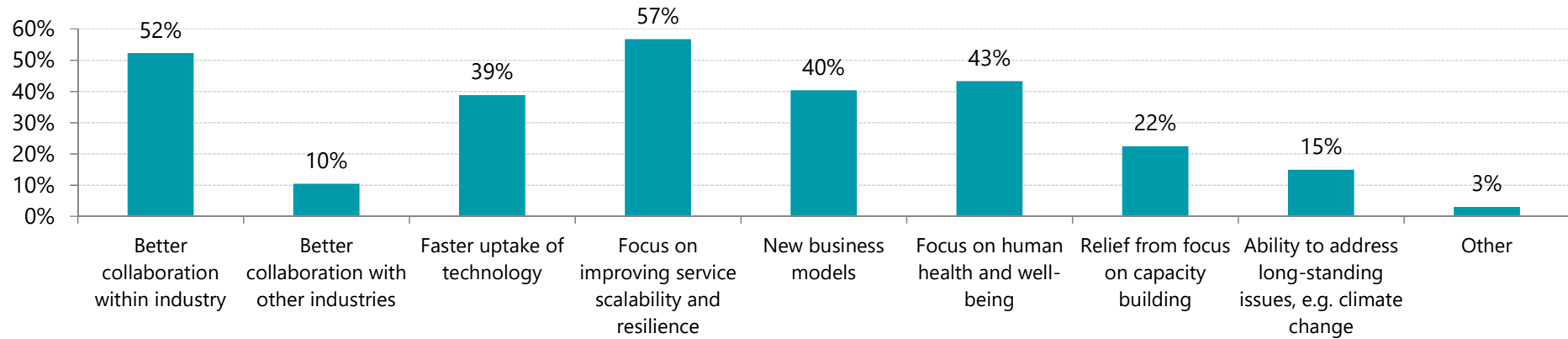


## A Shift in Priorities - The 'New Possible'

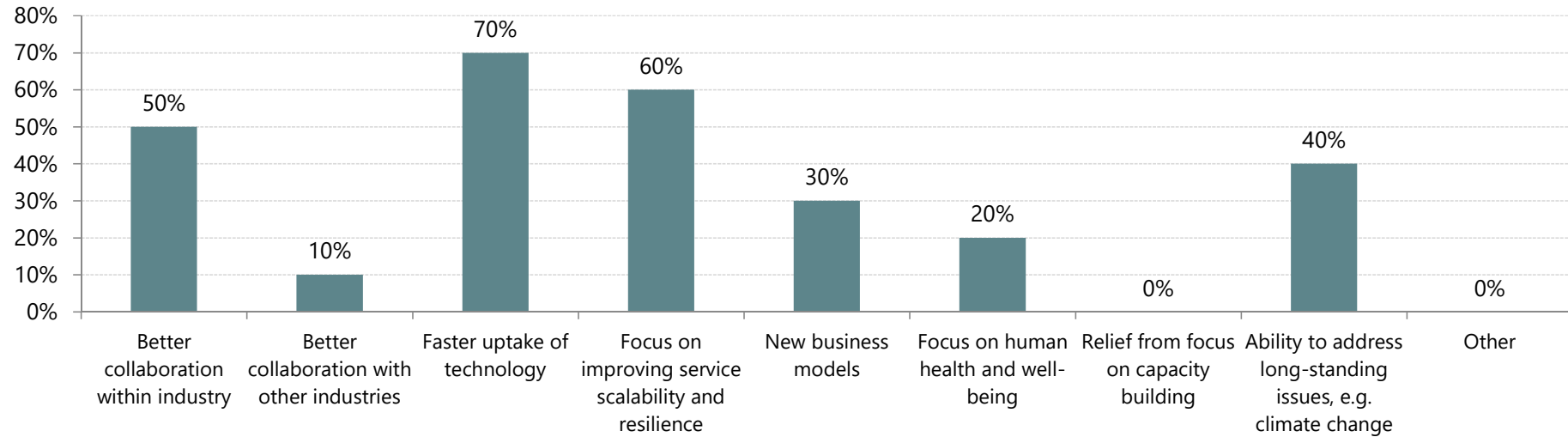
In your opinion, what are the best opportunities you see coming out of the crisis for the aviation industry as a whole?



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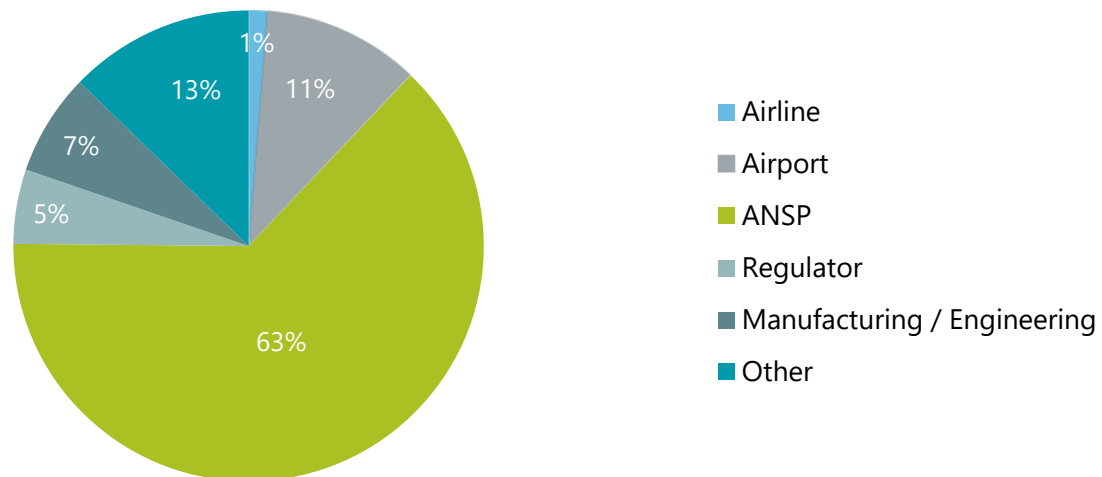


# ABOUT THE RESPONDENTS

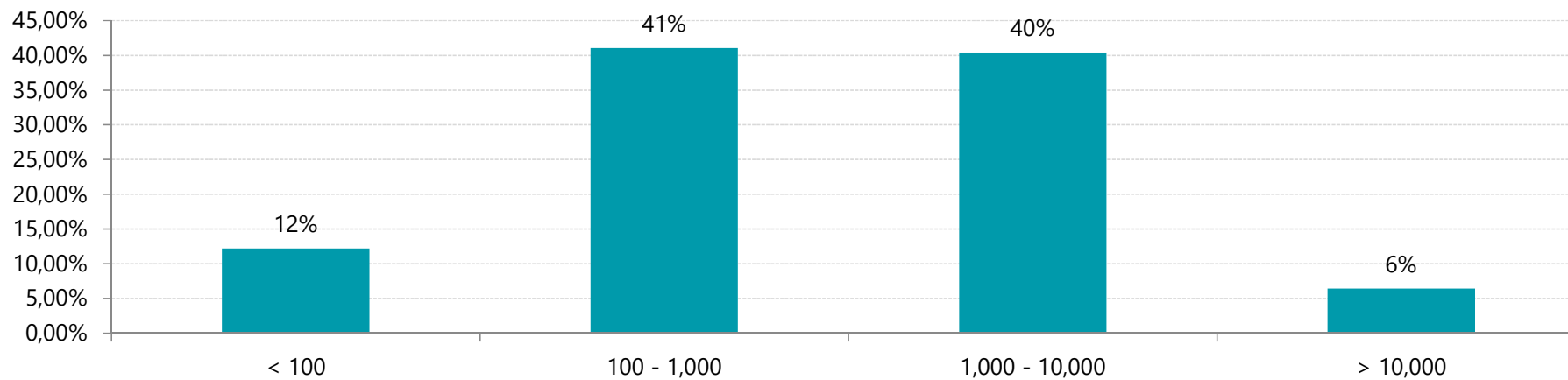


## About the Respondents – Type of organisation and staff

What type of organisation do you work for?

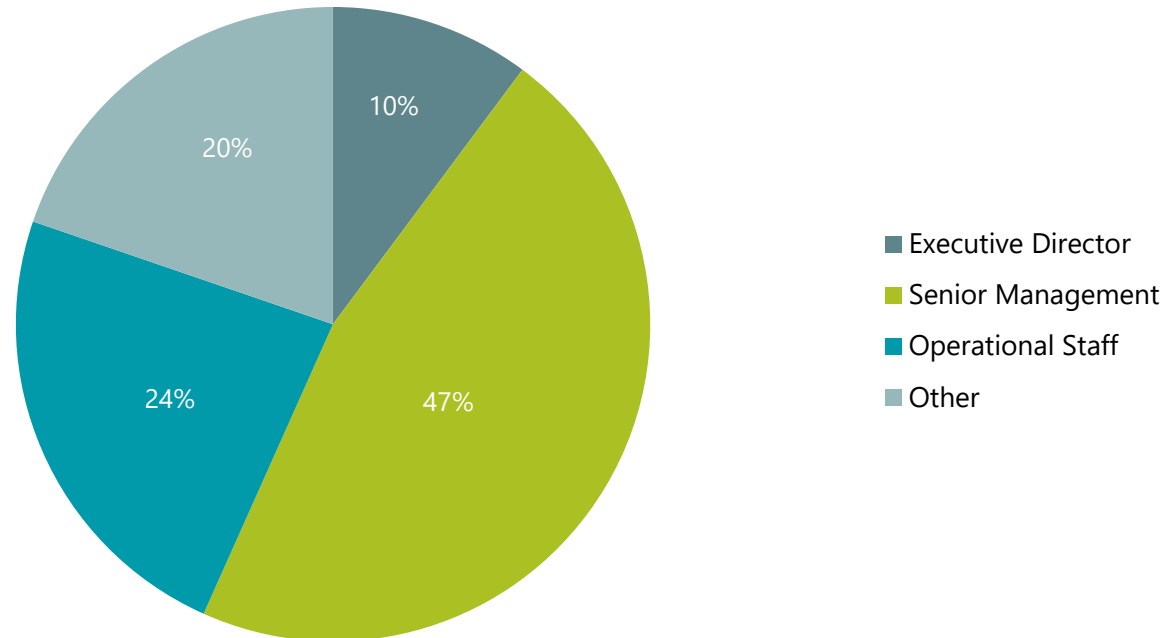


How many staff does your organisation have?

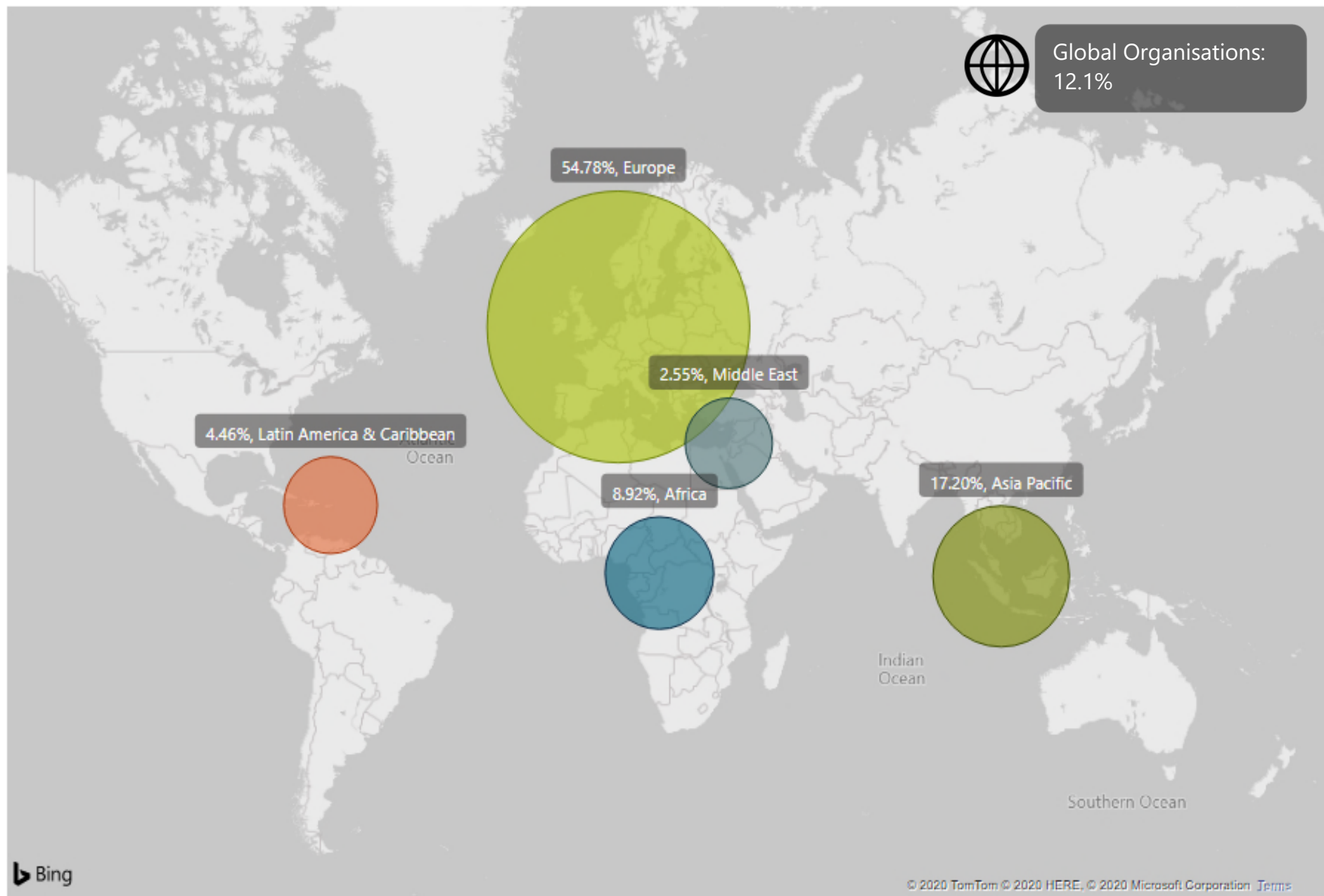


## About the Respondents – Position in organisation

Which level most accurately describes your position in your organisation?



## About the Respondents – Geographical distribution



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