

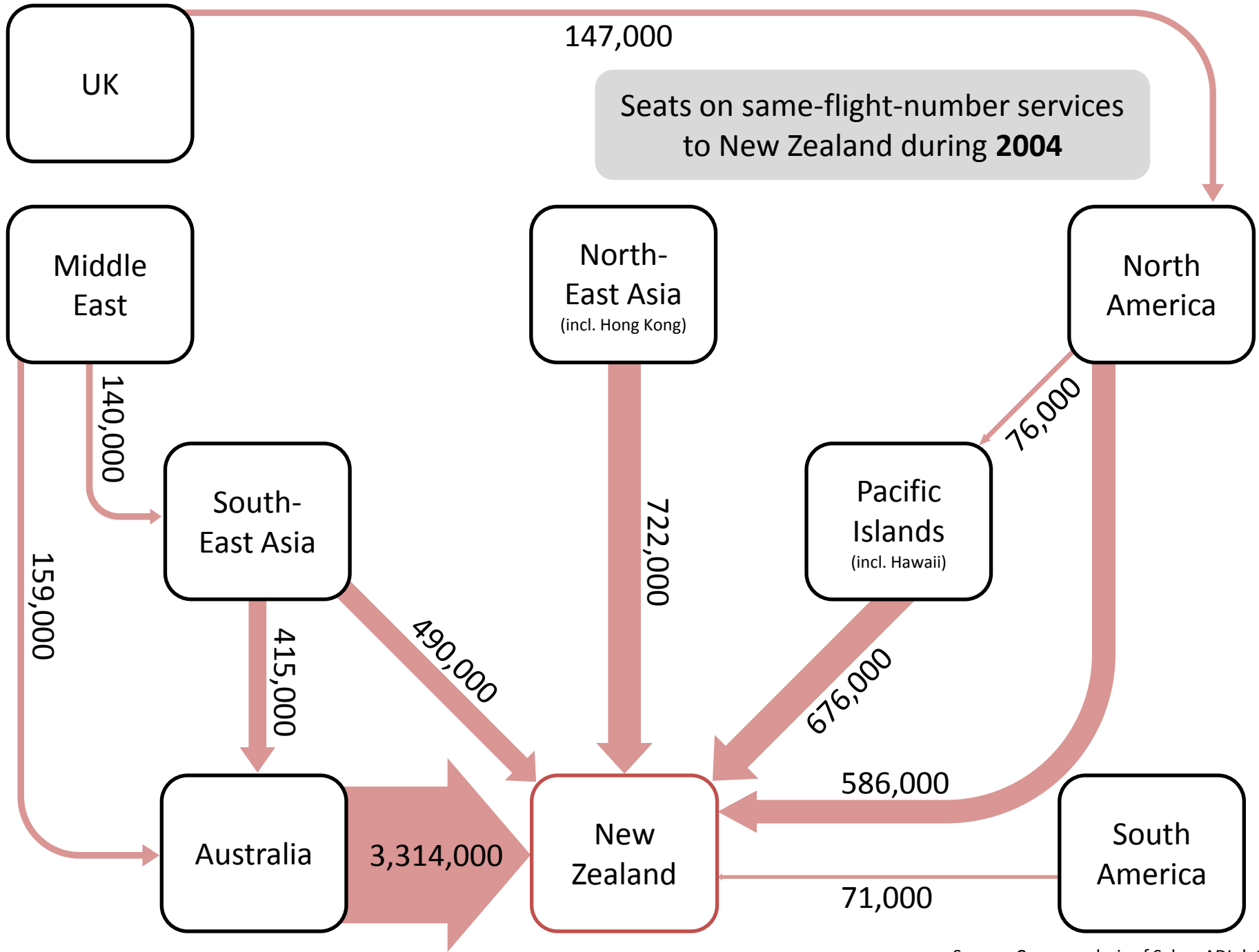
Capacity on New Zealand Inbound Air Routes

20 January 2010

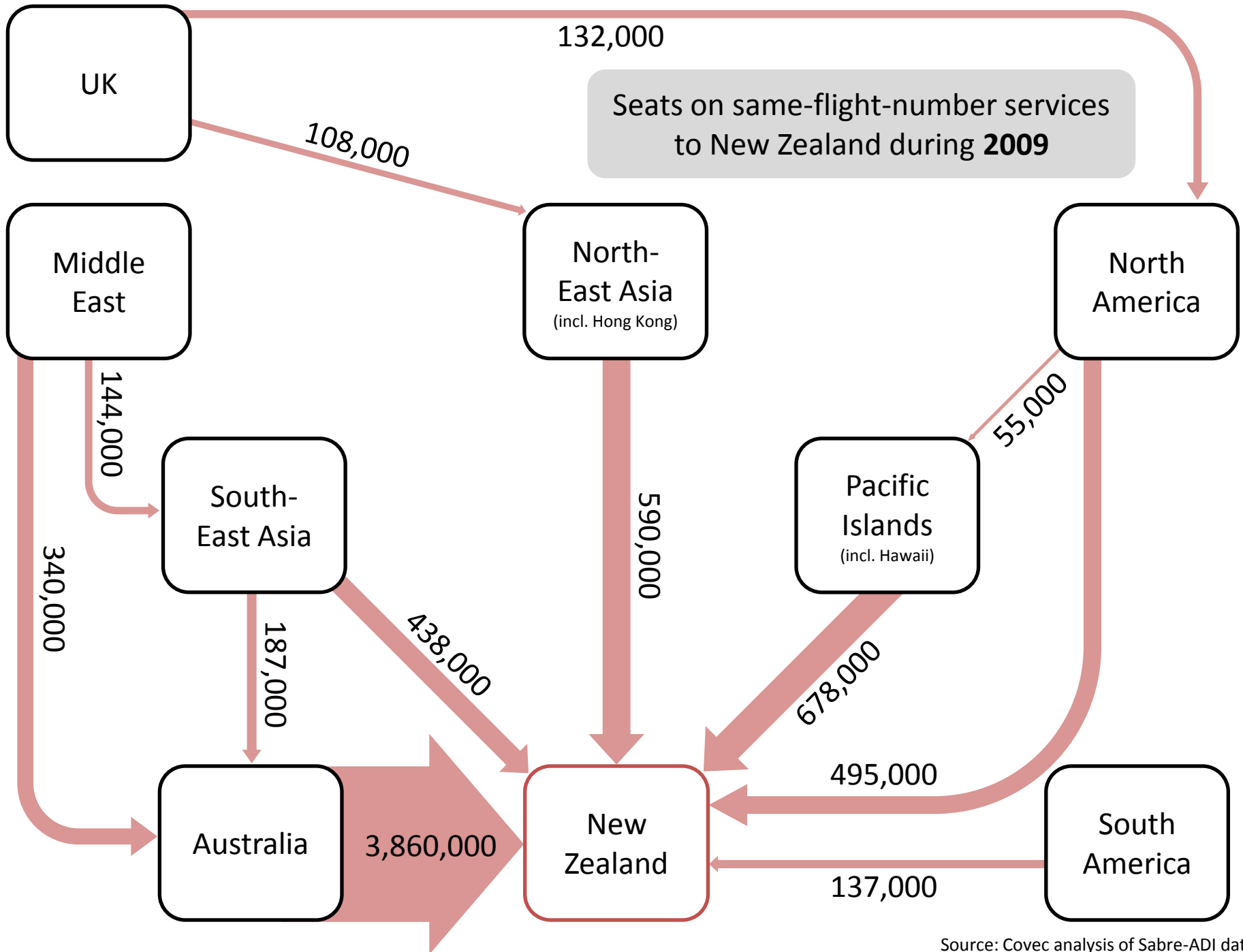
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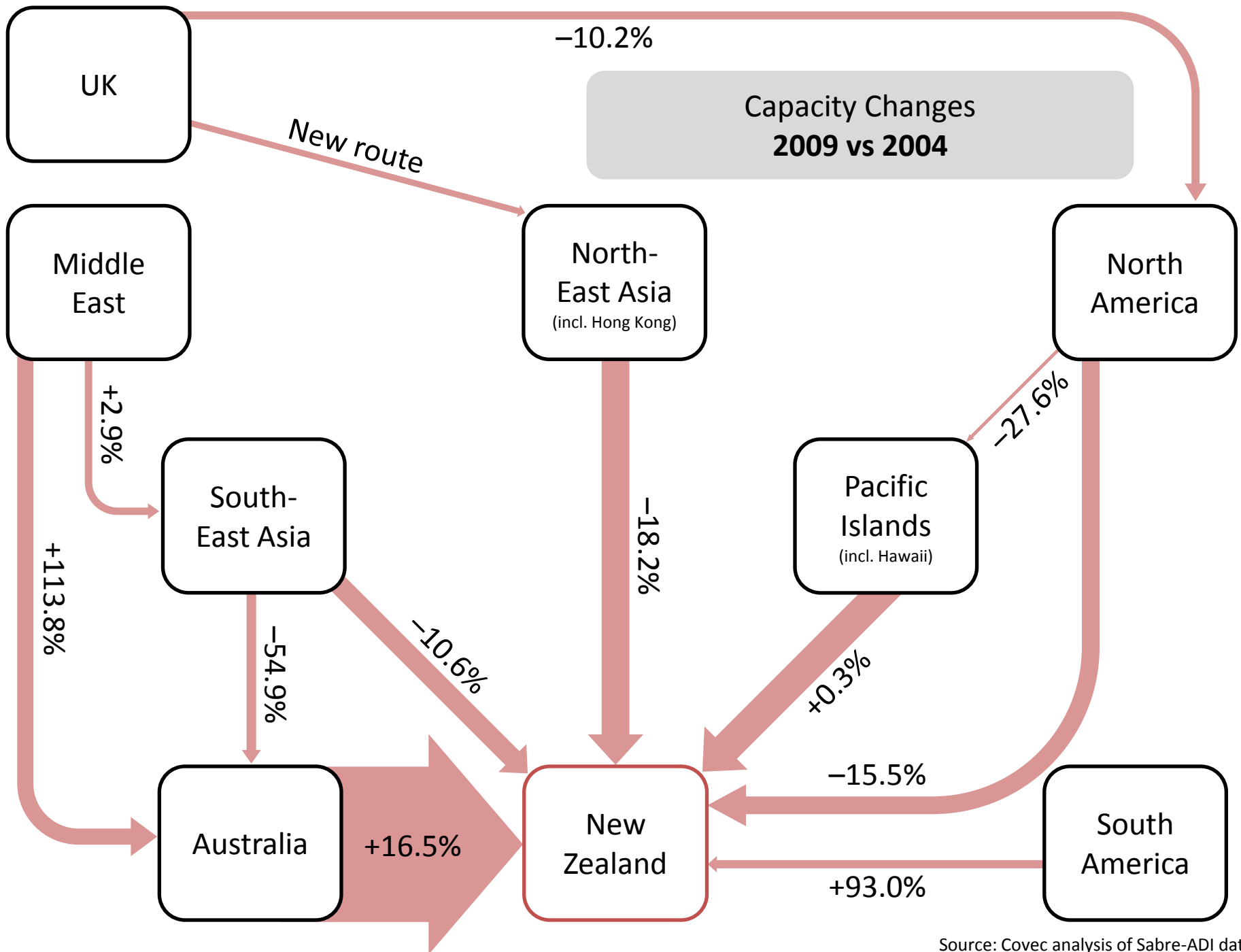


- The following slide shows the capacity (number of seats) on inbound **same-flight-number** air services to New Zealand during calendar 2004 and 2009.
- Prepared by Covec under the *Tourism and Aviation: Critical Linkages* project funded by the Foundation for Research, Science and Technology and the Ministry of Tourism.
- Figures are based on flight schedule data from Sabre-ADI, downloaded during November 2009.
- Assistance of Bruce Dale, Ministry of Tourism, is gratefully acknowledged, but he is not responsible for any errors.



Source: Covec analysis of Sabre-ADI data





Asian Routes Detail



- Capacities on North-East and South-East Asian routes to New Zealand:

| From | 2004 | | | 2009 | | | Change in Total |
|--------------|------------------|----------------|------------------|------------------|----------------|------------------|-----------------|
| | Non-stop | Via Australia | Total | Non-stop | Via Australia | Total | |
| Hong Kong | 229,000 | 0 | 229,000 | 299,000 | 0 | 299,000 | +30.5% |
| Singapore | 390,000 | 140,000 | 530,000 | 268,000 | 11,000 | 279,000 | -47.3% |
| Thailand | 0 | 190,000 | 190,000 | 76,000 | 133,000 | 209,000 | +10.0% |
| Japan | 242,000 | 0 | 242,000 | 124,000 | 0 | 124,000 | -48.8% |
| South Korea | 207,000 | 0 | 207,000 | 97,000 | 0 | 97,000 | -53.1% |
| Brunei | 0 | 41,000 | 41,000 | 32,000 | 43,000 | 75,000 | +82.9% |
| China | 0 | 0 | 0 | 70,000 | 0 | 70,000 | New |
| Malaysia | 100,000 | 12,000 | 112,000 | 62,000 | 0 | 62,000 | -44.6% |
| Taiwan | 45,000 | 0 | 45,000 | 0 | 0 | 0 | -100.0% |
| Indonesia | 0 | 32,000 | 32,000 | 0 | 0 | 0 | -100.0% |
| Total | 1,213,000 | 415,000 | 1,628,000 | 1,029,000 | 187,000 | 1,215,000 | -25.4% |

Note: Flights from Singapore and Thailand via Australia are Emirates flights that originate in Dubai (i.e. these flights have two stops en route to New Zealand).

Trans-Tasman Routes Detail



- Capacities on routes from Australia to New Zealand:

| Route | 2004 Capacity | 2009 Capacity | Route | 2004 Capacity | 2009 Capacity |
|---------|------------------|------------------|--------------|------------------|------------------|
| SYD-AKL | 1,096,000 | 1,088,000 | OOL-CHC | 3,000 | 32,000 |
| MEL-AKL | 491,000 | 533,000 | CNS-AKL | 30,000 | 28,000 |
| BNE-AKL | 603,000 | 531,000 | BNE-DUD | 0 | 22,000 |
| SYD-CHC | 378,000 | 461,000 | BNE-HLZ | 0 | 15,000 |
| BNE-CHC | 109,000 | 215,000 | SYD-HLZ | 0 | 12,000 |
| MEL-CHC | 198,000 | 196,000 | BNE-ZQN | 3,000 | 8,000 |
| SYD-WLG | 217,000 | 184,000 | MEL-ZQN | 2,000 | 8,000 |
| BNE-WLG | 21,000 | 126,000 | OOL-WLG | 0 | 8,000 |
| OOL-AKL | 0 | 124,000 | SYD-DUD | 0 | 5,000 |
| MEL-WLG | 88,000 | 102,000 | MEL-DUD | 0 | 3,000 |
| PER-AKL | 61,000 | 70,000 | OOL-HLZ | 0 | 1,000 |
| SYD-ZQN | 13,000 | 45,000 | Total | 3,314,000 | 3,860,000 |
| ADL-AKL | 1,000 | 43,000 | | | |

Note: BNE-AKL, SYD-AKL, MEL-AKL and SYD-CHC include Emirates flights originating in Dubai, some of which are via Singapore and Thailand.

BNE-AKL also includes Royal Brunei flights originating in Brunei.



- Only seats on **same-flight-number** through services are included.
 - Inbound travellers have many other options, e.g. Singapore Airlines flights from Europe to NZ via Singapore, with a change of aircraft and flight number in Singapore.
- Capacity on through flights is allocated to all legs of the flight, therefore these numbers are **maximum** capacities.
 - Air NZ flight NZ1 LHR-LAX-AKL appears as capacity on both the UK -> North America and North America -> New Zealand routes.
 - Emirates flight EK418 DXB-BKK-SYD-CHC appears as capacity on Middle East -> South-East Asia, South-East Asia -> Australia and Australia -> New Zealand routes.



- Capacities reported by Sabre are incorrect for some aircraft types of some airlines.
- Where possible we have corrected these using information about the actual number of seats per aircraft.
 - Route capacities reported here should therefore be treated as *estimates* rather than exact figures.
- More information about actual configurations was available for 2009 than 2004.
 - The 2004 route capacity estimates are less accurate.



- Total inbound capacity can be calculated by adding up the capacities on all non-stop flights to New Zealand, i.e. all the arrows that directly lead to New Zealand.
 - All inbound passengers must be on one of these flights eventually, to arrive in New Zealand.
- Total inbound capacity for 2004 is approximately 5,858,000 seats and for 2009 is approximately 6,200,000 seats. Total inbound capacity therefore increased by about 6% over the past five years.

- 2009 inbound through routes where New Zealand is the **final destination** are:

DXB-SIN-BNE-AKL, DXB-BKK-SYD-AKL, DXB-BKK-SYD-CHC, LAX-APW-TBU-AKL, BWN-BNE-AKL, DXB-MEL-AKL, DXB-SYD-AKL, DXB-BNE-AKL, DXB-SYD-CHC, LAX-PPT-AKL, LAX-RAR-AKL, LHR-LAX-AKL, LHR-HKG-AKL

These routes provide *inbound* capacity in *one direction* only.

- 2009 inbound through routes where New Zealand is an **intermediate stop** are:

MEL-AKL-LAX, SYD-AKL-EZE, SYD-AKL-SCL

These routes provide *inbound* capacity in *both* directions.

- Regions, countries and airports included in the analysis:

| Country | Airports |
|-----------------|-----------------------------------|
| Australia | ADL, BNE, CNS, MEL, OOL, PER, SYD |
| Middle East | |
| UAE | DXB |
| North America | |
| Canada | YVR |
| USA | LAX, SFO |
| North-East Asia | |
| China | HKG, PEK, PVG |
| Japan | FUK, KIX, NGO, NRT |
| South Korea | ICN |
| Taiwan | TPE |
| South-East Asia | |
| Brunei | BWN |
| Indonesia | DPS |
| Malaysia | KUL |
| Singapore | SIN |
| Thailand | BKK |

| Country | Airports |
|------------------|------------------------------|
| Pacific Islands | |
| American Samoa | PPG |
| Australia | NLK |
| Cook Islands | RAR |
| Fiji | NAN, SUV |
| French Polynesia | PPT |
| New Caledonia | NOU |
| Niue | IUE |
| Samoa | APW |
| Solomon Islands | HIR |
| Tonga | TBU |
| USA | HNL |
| Vanuatu | VLI |
| New Zealand | |
| | AKL, CHC, DUD, HLZ, WLG, ZQN |
| UK | |
| | LHR |
| South America | |
| Argentina | EZE |
| Chile | SCL |