



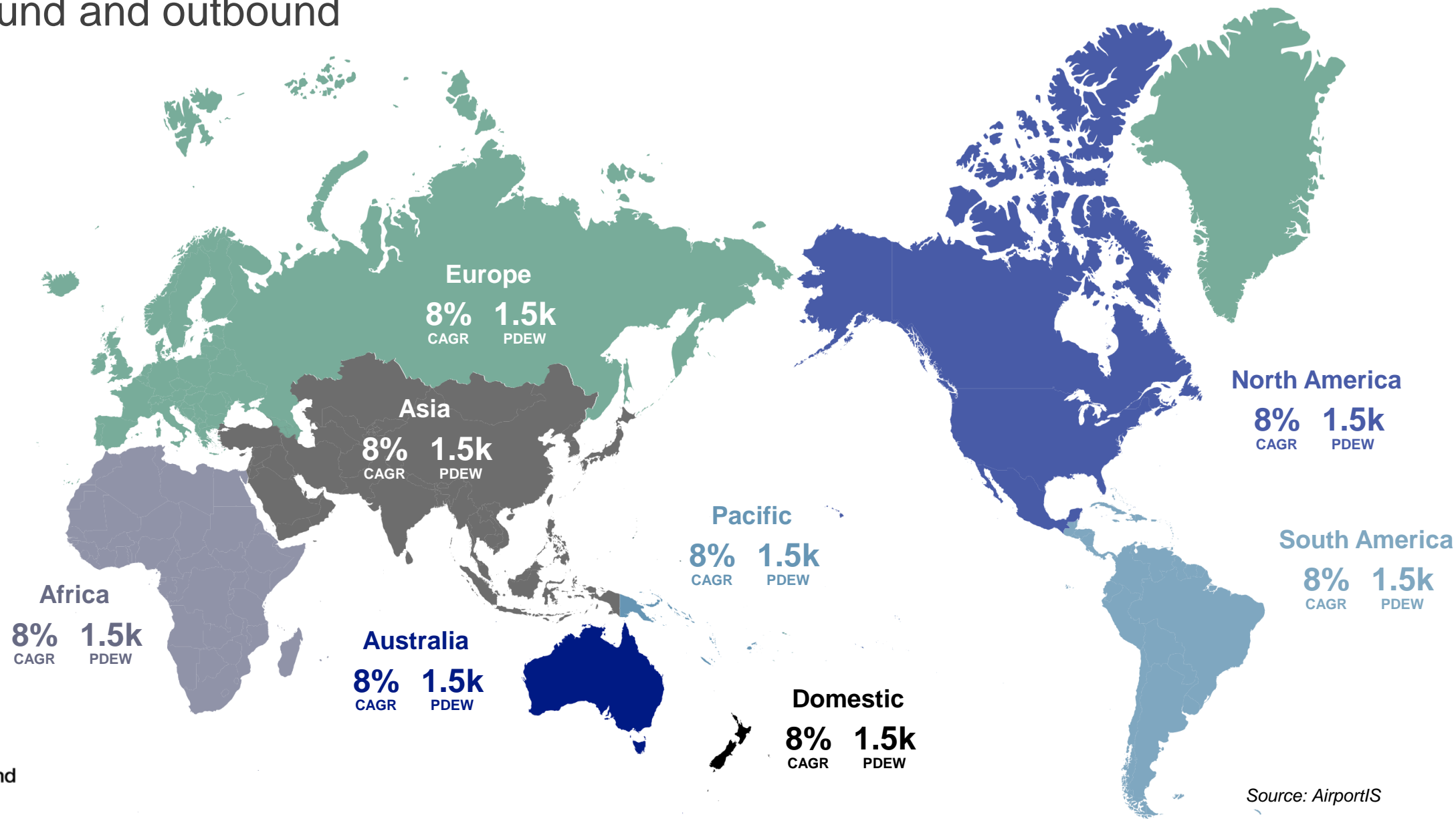
American Airlines

DFW-AKL

Market support workshop

Jan 2020

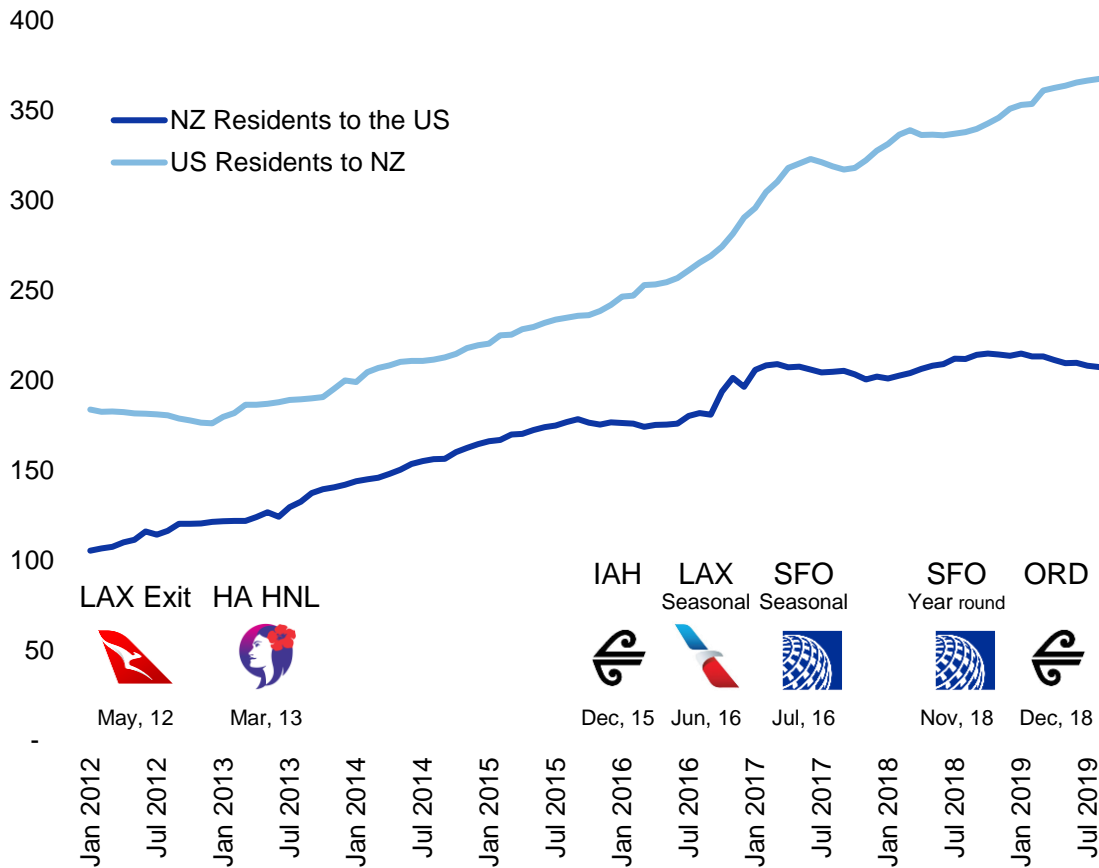
New Zealand to the world continues to show strong passenger growth, both inbound and outbound



The arrival of US carriers has increased US point of sale. The market remains broadly balanced with NW favoring US point of sale and NS favoring NZ POS

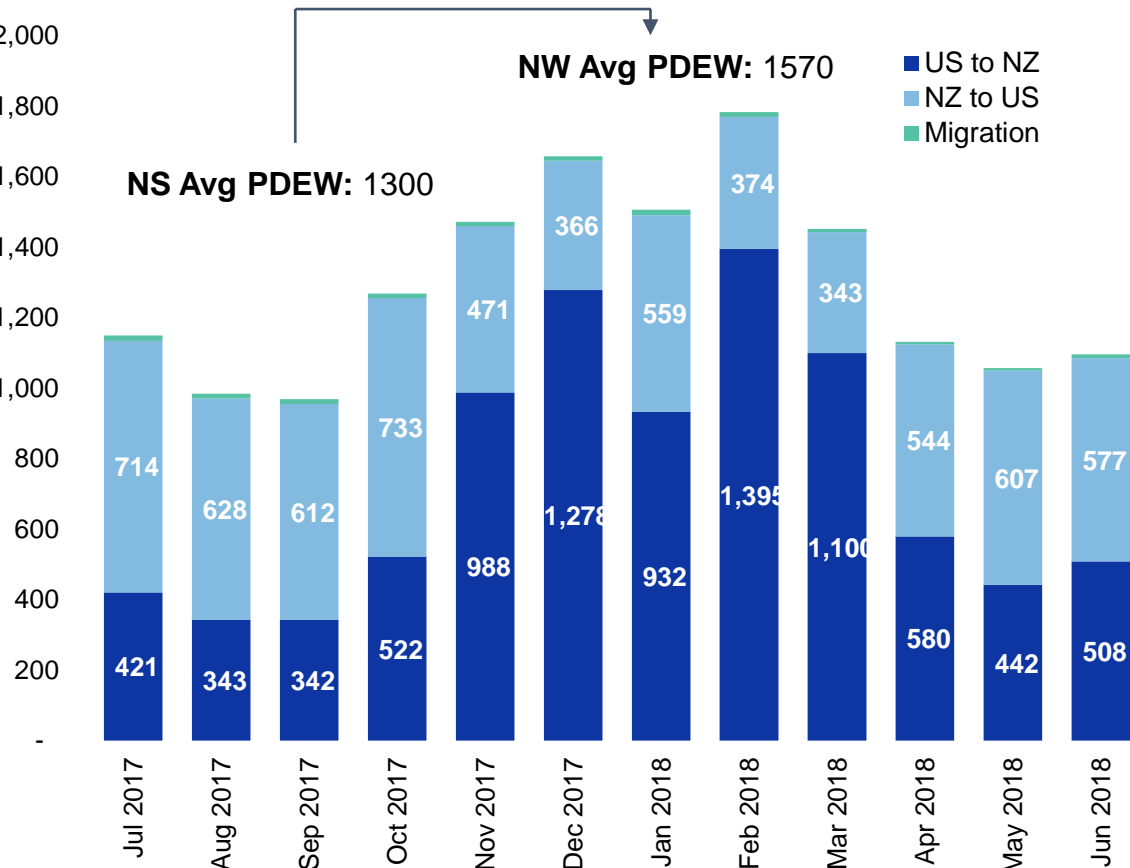
MAT US-NZ arrivals

Arrivals into NZ (000's)



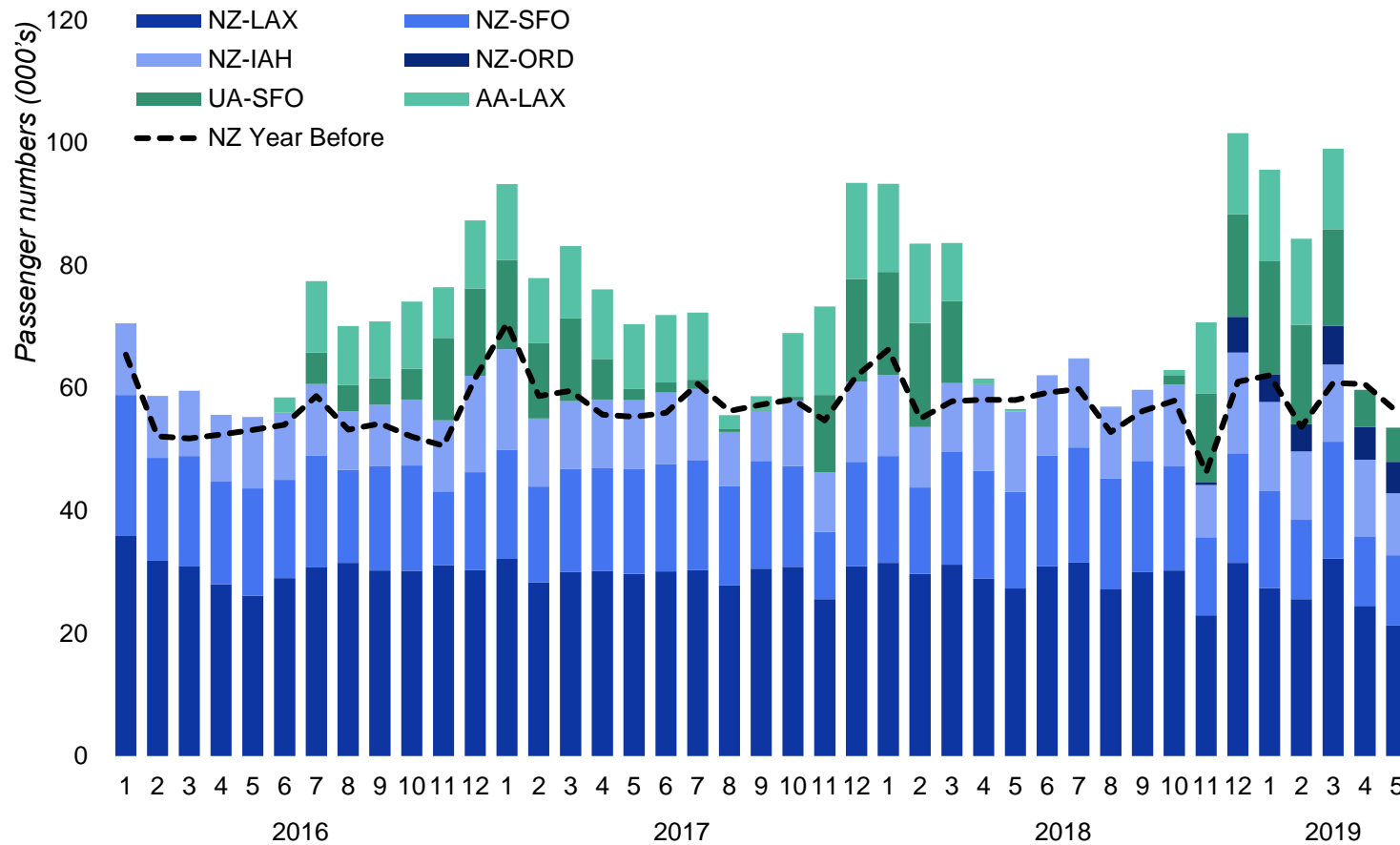
Seasonality

PDEW

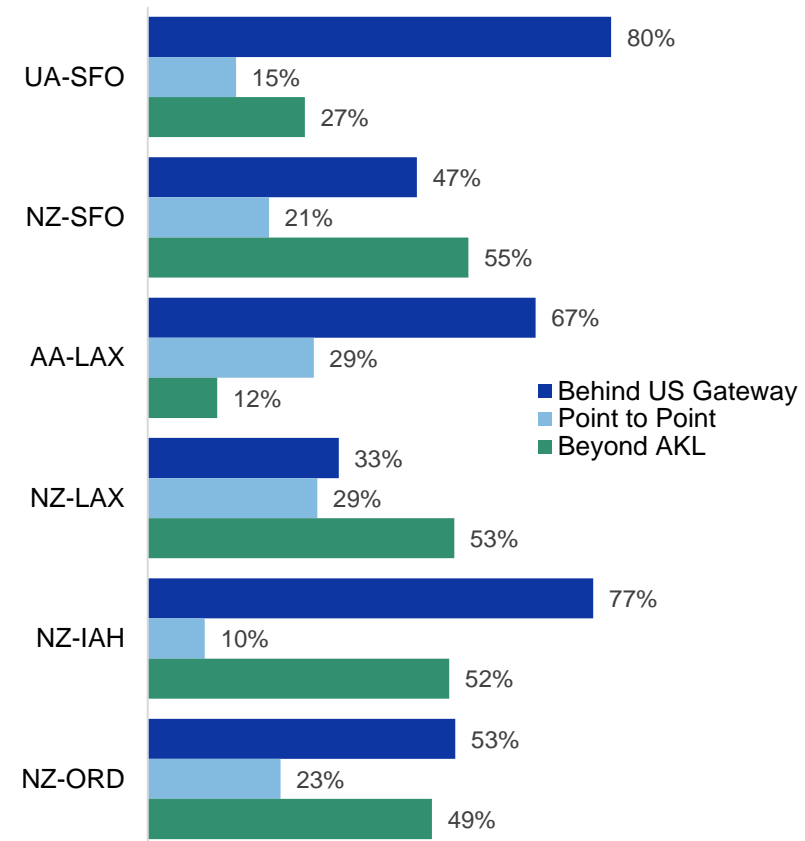


The entry of US carriers did not impact Air New Zealand but created new passengers by connecting passengers behind the LAX/SFO gateway

Passengers carried by airline/route

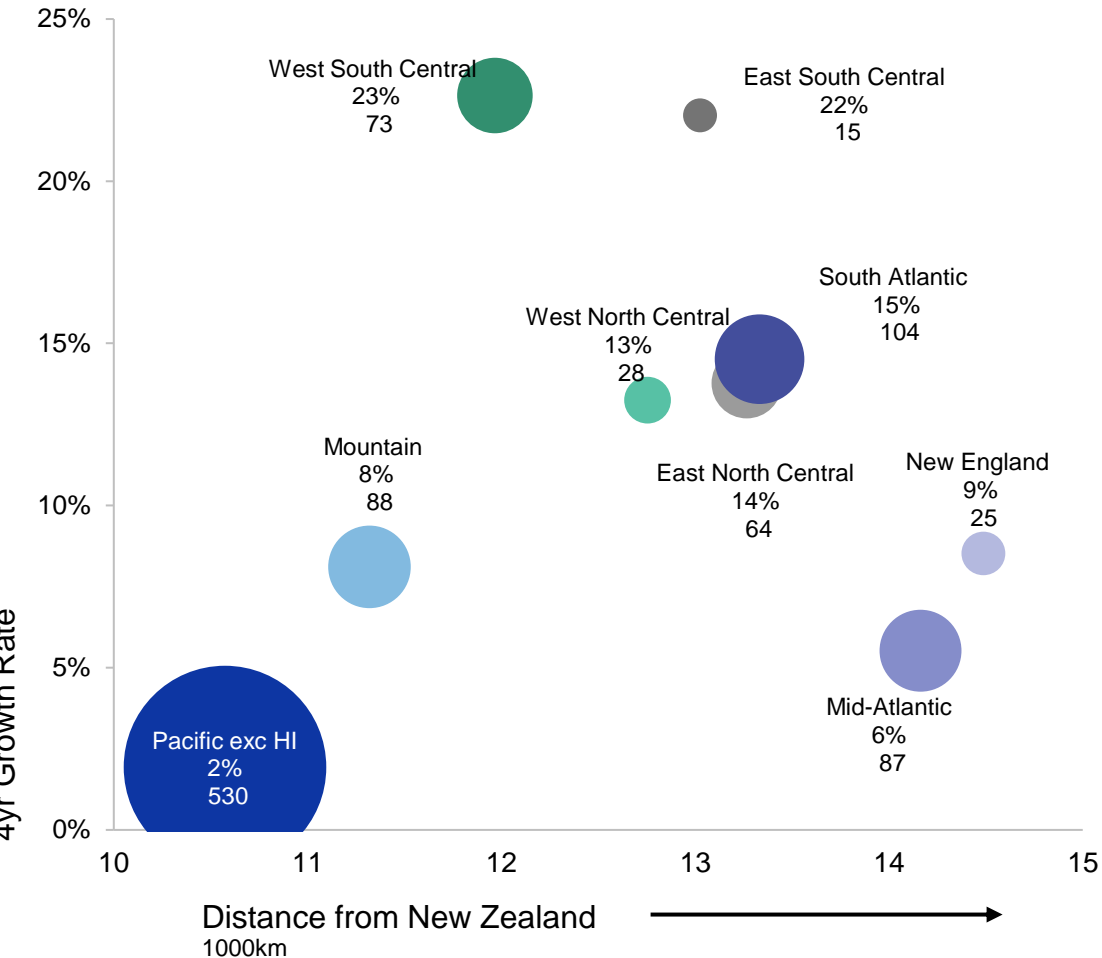


Source of traffic

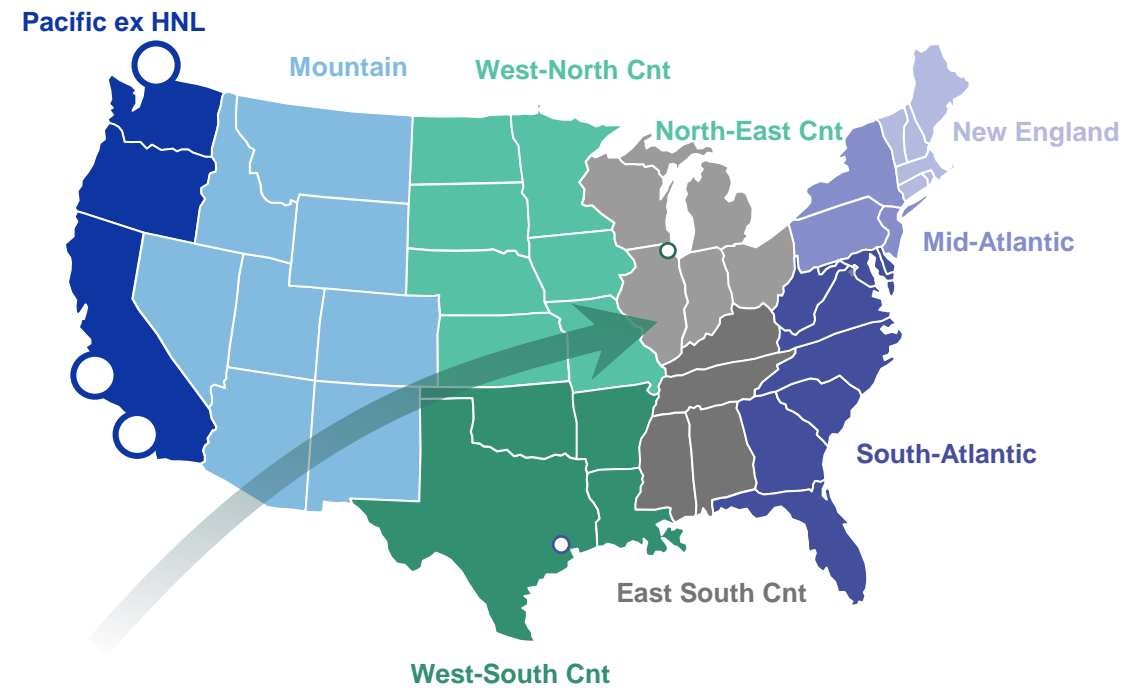


West coast markets are large & well developed. New services into US hubs are connecting and growing the east of the US

Distance from New Zealand v growth rate



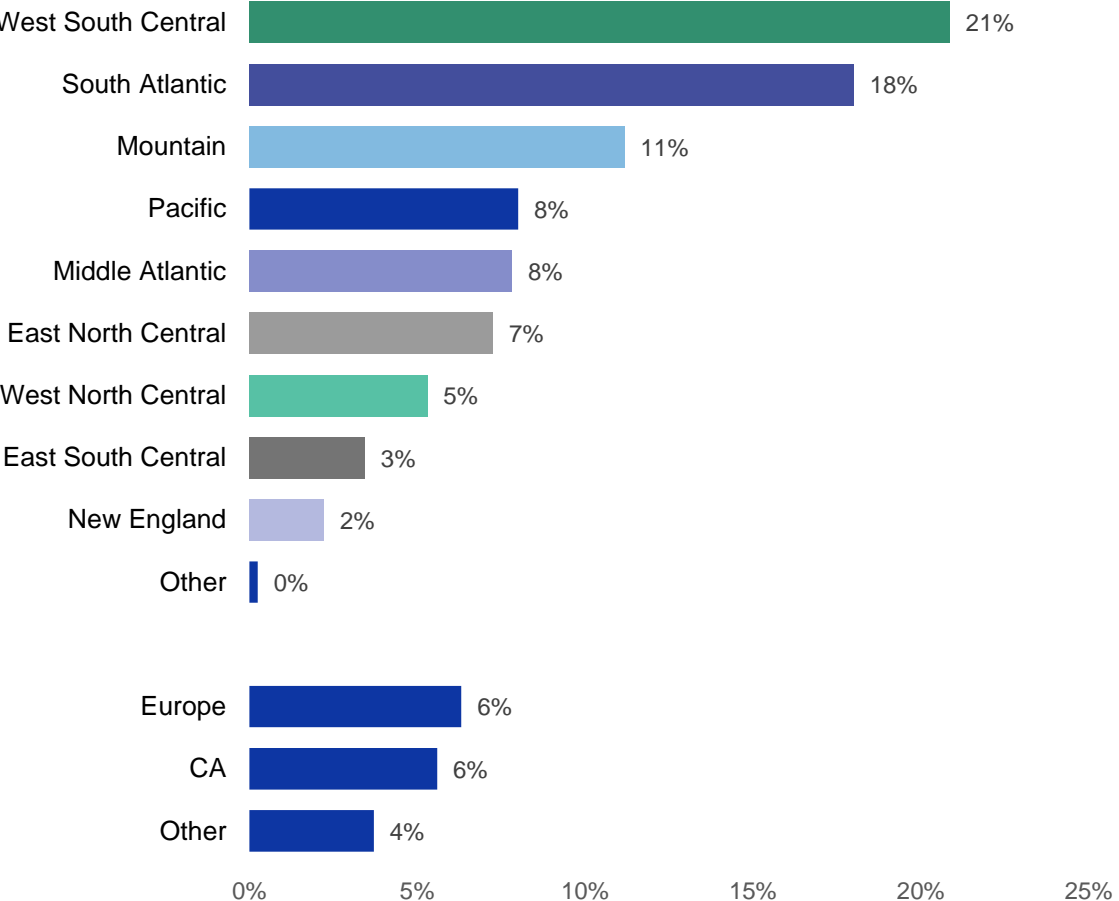
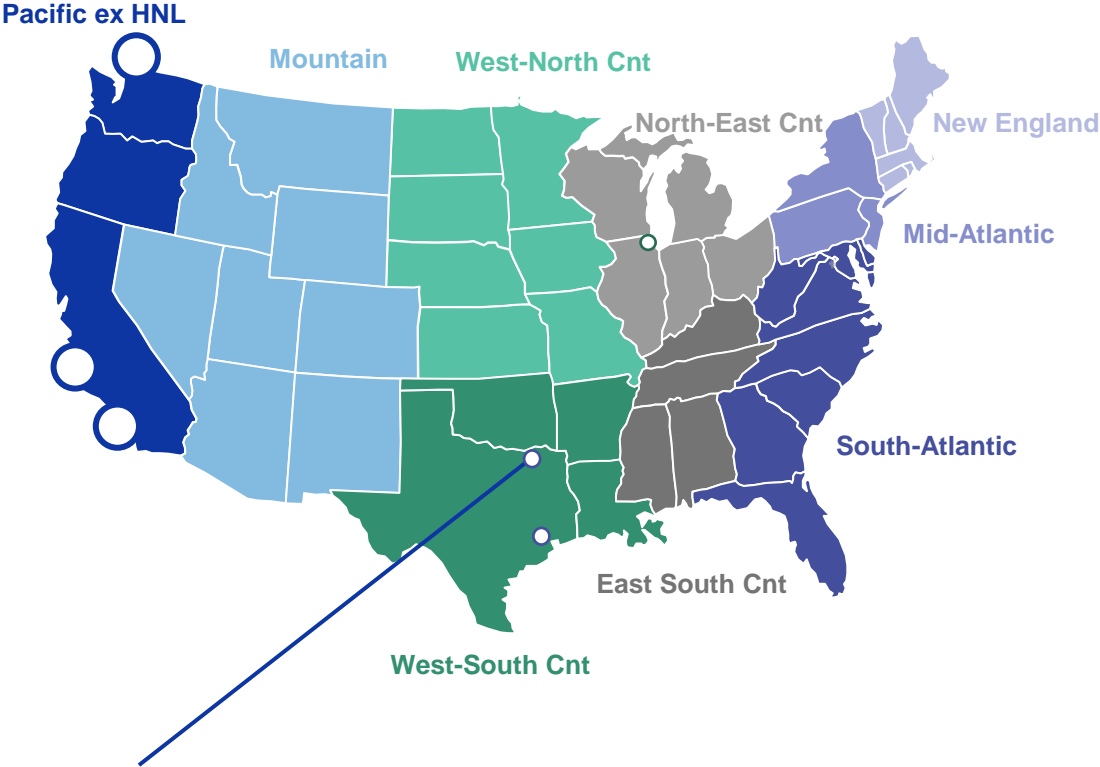
New services are connecting east



Demand for DFW-AKL is forecast to come from the east and central states; likely to be more US point of sale than LAX-AKL (71% US POS)

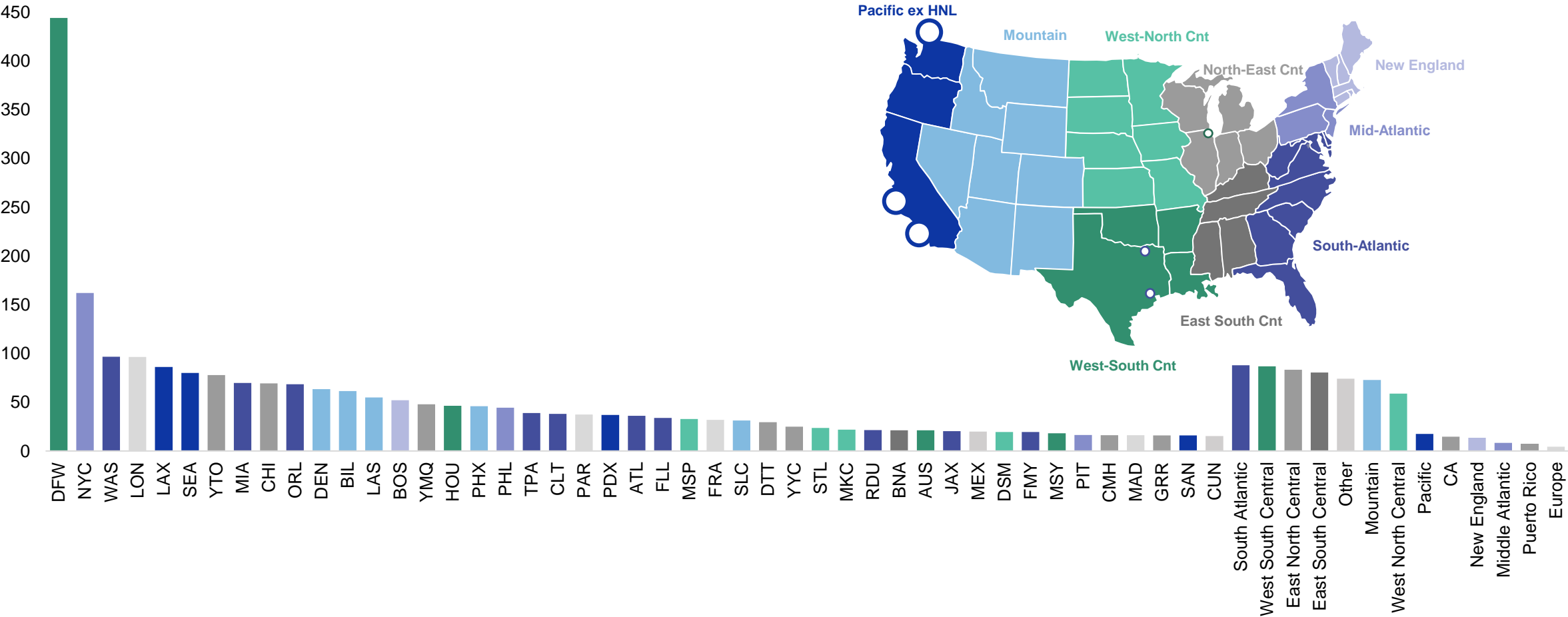
Demand will come from the East/Central

Modelling of OD (on the DFW side)



Demand for DFW-AKL is forecast to be sourced from a long tail of US cities

Forecast passenger demand per week



New Zealand demand will be focused in Auckland with 3/4 of the New Zealand population living in the Auckland Airport catchment

New Zealand's population



4.8m
NZ Population



1.7m
Auckland

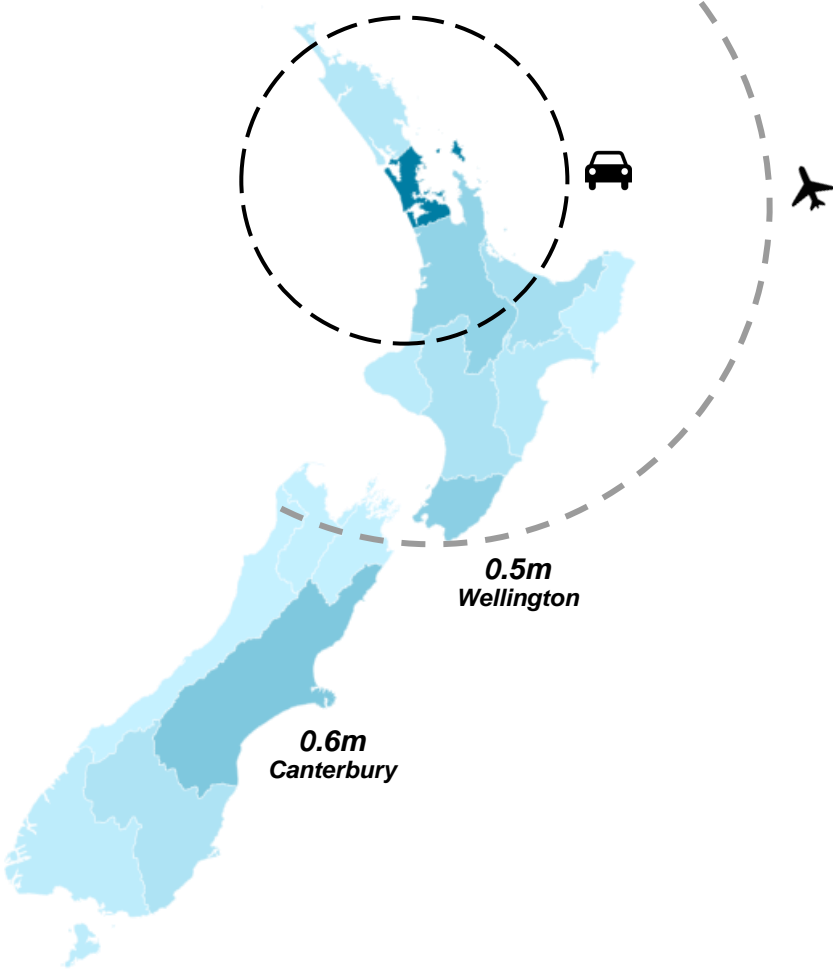


2.4m
3hr Drive Catchment



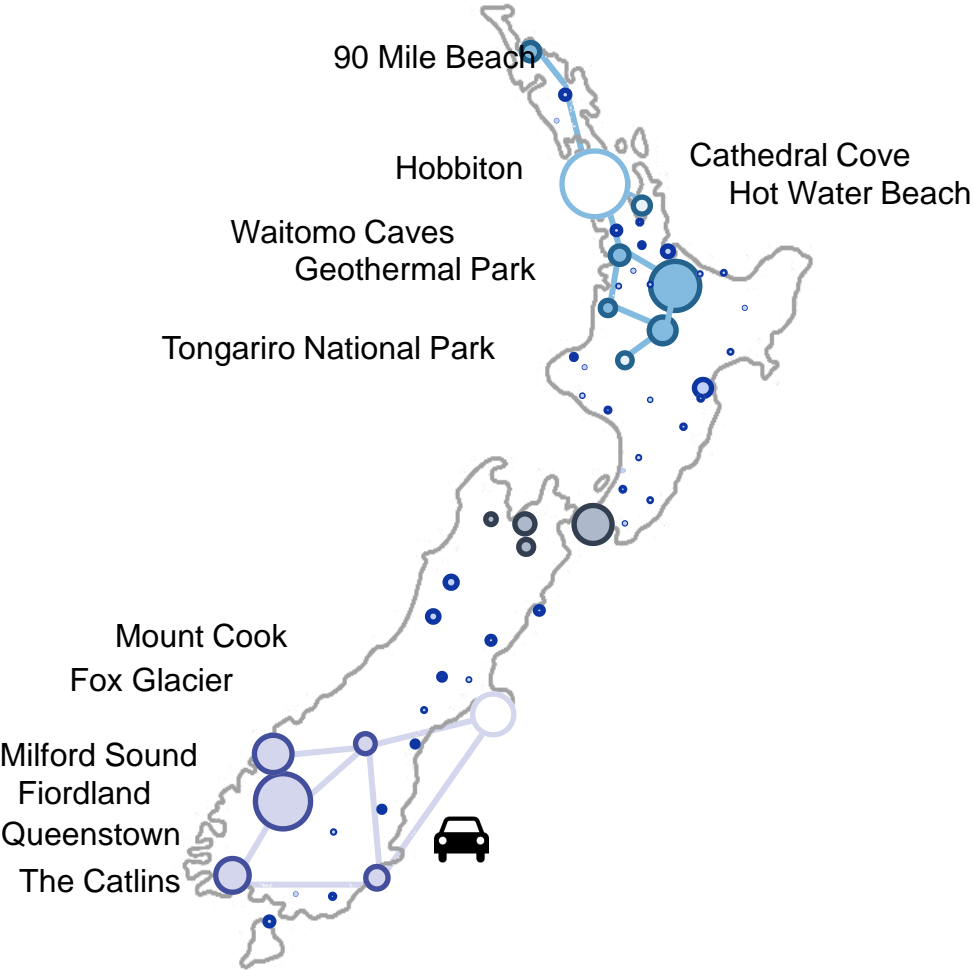
3.2m
Long-haul Catchment

Auckland Airport's catchment

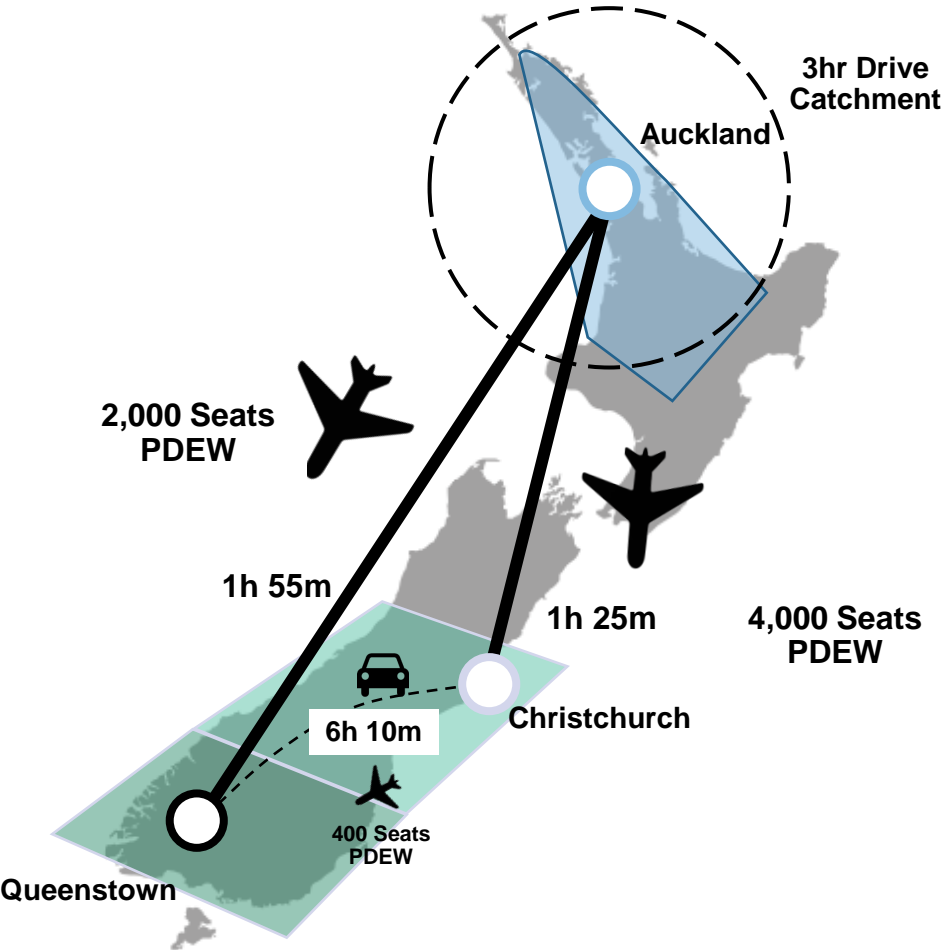


82% of long-haul tourists surveyed travelled the North Island with 62% travelling both islands

Visitor nights show a clear tourist areas in the North & South



AKL is an effective port to both North and South



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