



OAG®

SUMMER INSIGHTS: SHARING OUR PASSION FOR AVIATION DATA

Wednesday June 19th, 2024

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SPEAKERS

CHIEF ANALYST



John Grant

Chief Analyst, OAG

With a wealth of experience across the global aviation industry, John provides expert commentary on market developments for OAG, making connections between what the data is telling us and the trends and events occurring in the sector.

GUEST SPEAKER



Sanja Ples

Chief Data Officer, CH Aviation

Sanja Ples is an experienced aviation expert with more than 15 years of expertise. She has a strong foundation in operations, sales, and marketing, together with a strong passion for aviation.

She is currently the Chief Data Officer and co-owner of ch-aviation, where her main goal is to make sure the aviation community receives reliable news and statistics on the airline business.

GUEST SPEAKER



Courtney Miller

Founder & MD, Visual Approach

After nearly two decades in the industry, Courtney Miller has a breadth of experience spanning operations, sales, fleet and network planning, cargo planning, market forecasting, and data analytics.

He is the Founder and Managing Director of Visual Approach, providing data and research to the aviation industry.

MODERATOR



Deirdre Fulton

Partner, MIDAS Aviation

Deirdre is a partner in an aviation consultancy providing meaningful insight and analysis to clients around the world. She works closely with OAG on their data analysis and publications.



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Today's discussion

- In this webinar we're taking a deeper look at some key characteristics of how people travel
 - Shining a light on some of the world's longest routes
 - What potential do single aisle aircraft offer for global travel?
 - And looking in the other direction – where are the widebodies on short haul routes?
 - Where are current hotspots for new route activity and who benefits from that?
- We'll be taking questions as we go. Please use the chat function to ask your questions.

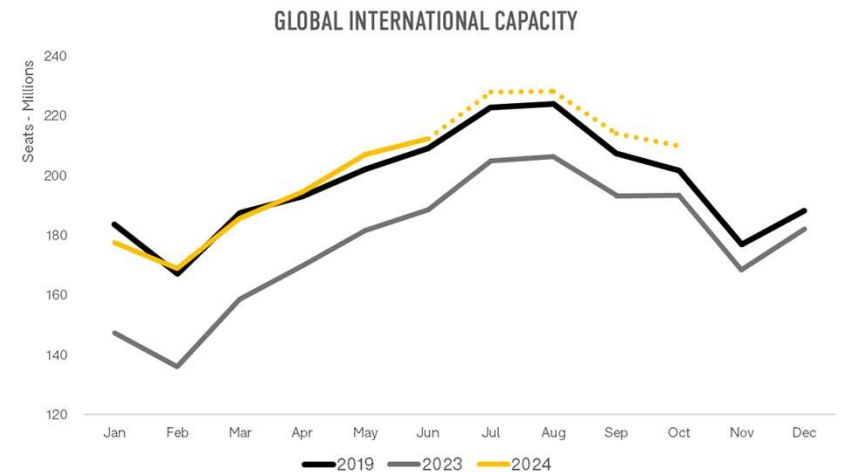
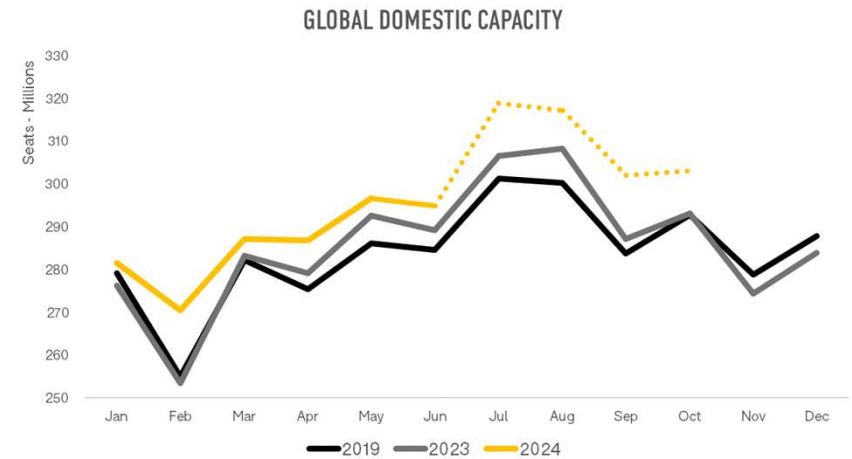
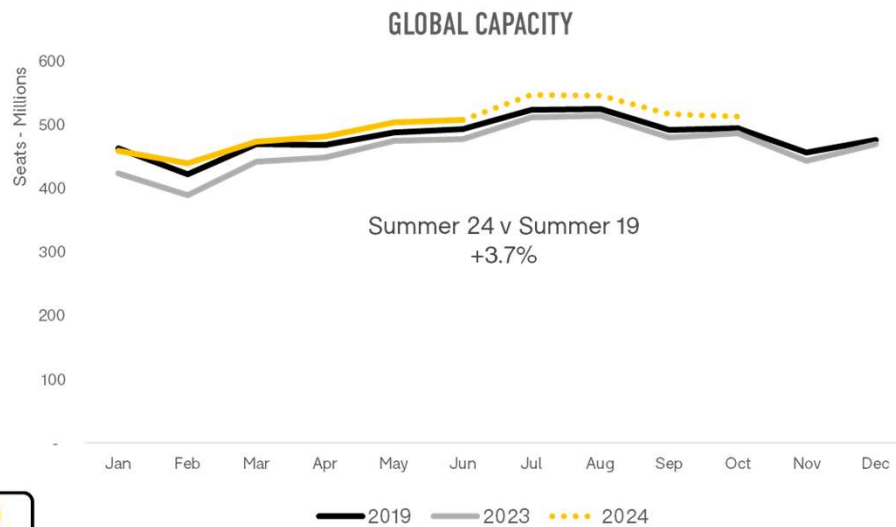


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GROWTH TRENDS CONTINUE THROUGH THE SUMMER

- Capacity growth looks set to continue the trend of recent months, sitting 3.7% above the pre pandemic period
- Domestic capacity is expected to grow at 3.1% this summer on last year and is trending at 4.7% ahead of 2019
- International is also ahead of 2019, by 2.3% and up 11.6% on 2023



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THE WORLD’S LONGEST ROUTES

- The 10 longest flights in the world all cover distances of over 14,000km, and all take between 16-18 hours.
- The longest flight, between JFK and SIN, flies just over a third of the way round the world. It operates with two full crews, and they have three days off before the return leg to recover.
- 6 of the longest routes start or end in Australia and New Zealand, facilitating connectivity at opposite ends of the world.
- New this summer, China’s longest route operated by China Southern connects Shenzhen and Mexico City directly for the first time. The route only operates direct on the way however, as the altitude at Mexico City means a fuel stop at Tijuana is needed on the return leg.



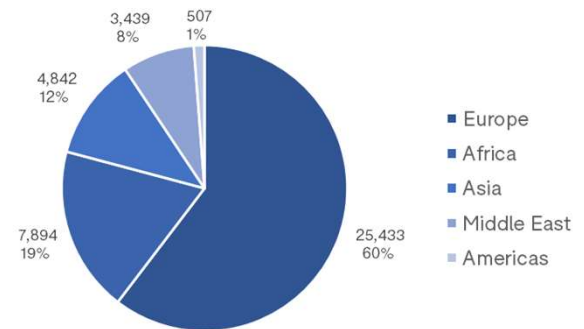
Top 10 Longest Flight Routes in Summer 2024
By GCD (km)

Ranking Summer 2024	Market Pair (Airport)	Dep Airport Name	Arr Airport Name	GCD (km)	Ranking Summer 2023	Carrier
1	JFK-SIN	New York J F Kennedy International Apt	Singapore Changi Apt	15332	1	Singapore Airlines
2	EWB-SIN	Newark Liberty International Apt	Singapore Changi Apt	15329	2	Singapore Airlines
3	AKL-DOH	Auckland International Apt	Doha (QA)	14526	3	Qatar Airways
4	LHR-PER	Perth	London Heathrow Apt	14499	4	Qantas Airways
5	DFW-MEL	Melbourne Airport	Dallas Dallas/Fort Worth Intl Apt	14468	5	Qantas Airways
6	CDG-PER	Paris Charles de Gaulle Apt	Perth	14265	-	Qantas Airways
7	AKL-JFK	Auckland International Apt	New York J F Kennedy International Apt	14209	6	Qantas Airways, Air New Zealand
8	AKL-DXB	Auckland International Apt	Dubai International	14193	7	Emirates
9	SZX-MEX	Shenzhen (CN)	Mexico City Juarez Intl	14124	-	China Southern
10	LAX-SIN	Los Angeles International Apt	Singapore Changi Apt	14096	8	Singapore Airlines

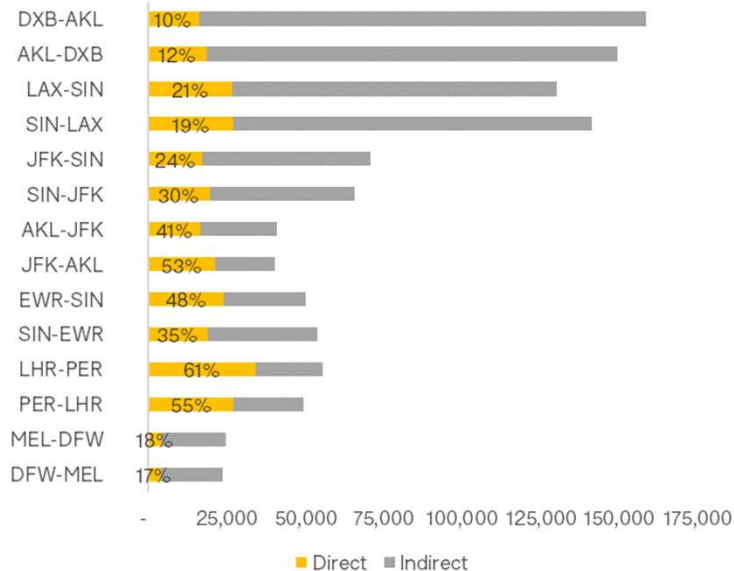
Source: [OAG](#)

THE DATA BEHIND THE LONGEST ROUTES

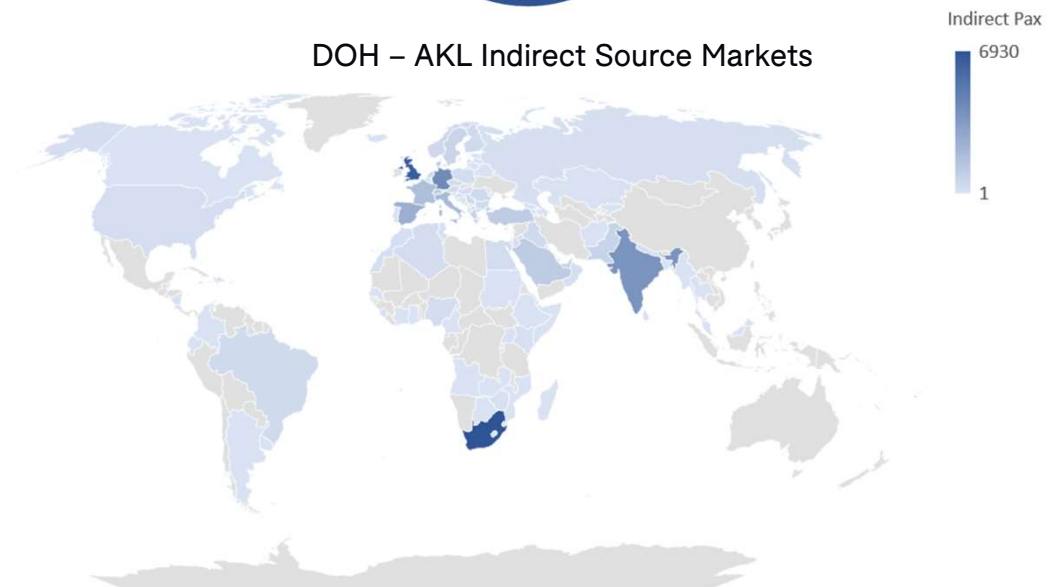
- Typically these ultra long haul flights have an element of connecting passengers whose journeys originate behind or beyond the route's origin point.
- LHR-PER has the highest share of direct passengers with 61% travelling from London to Perth, and 55% the other way.



Direct and Indirect Passengers on Longest Routes



DOH - AKL Indirect Source Markets

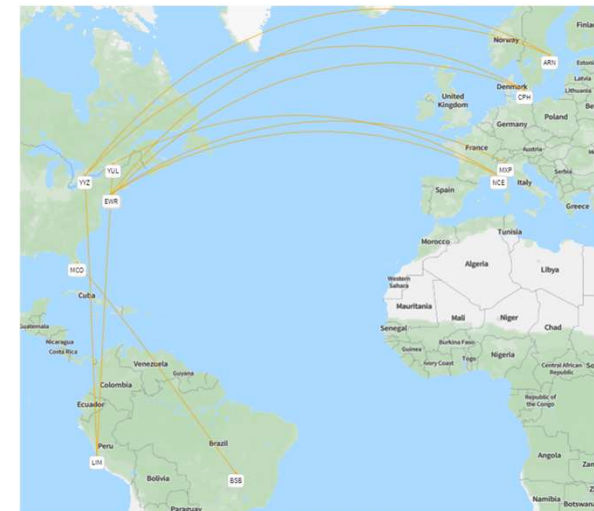
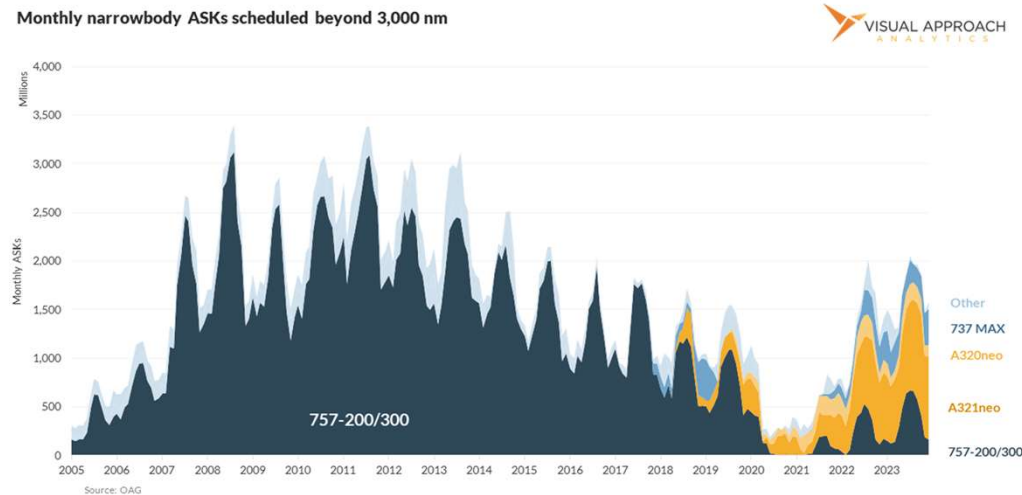


TOP 10 LONGEST SINGLE AISLE AIRCRAFT ROUTES...

- The longest single aisle aircraft routes currently operate at a range of between 6,000-6,500km and predominantly on transatlantic routes on smaller, secondary routes.
- Narrowbodies have operated on the transatlantic for a number of years, and still do – United operate a 757-200 on their Stockholm – Newark route this summer
- Three of the Top 10 longest single aisle routes operate between the USA and Latin America

Route	Aircraft Type	Carrier	GCD (km)
EWB-MXP	Airbus A321	La Compagnie	6,433
EWB-NCE	Airbus A321	La Compagnie	6,428
LIM-YUL	Airbus A321neo	Air Transat A.T.Inc.	6,397
ARN-YYZ	Airbus A321neo	SAS Scandinavian Airlines	6,309
ARN-EWR	Boeing 757-200 Passenger	United Airlines	6,304
CPH-YYZ	Airbus A321neo	SAS Scandinavian Airlines	6,265
LIM-YYZ	Airbus A321neo	Air Transat A.T.Inc.	6,193
CPH-JFK	Airbus A321neo	SAS Scandinavian Airlines	6,185
BSB-MCO	Boeing 737MAX 8 Passenger	GOL Linhas Aereas S.A.	6,091

Monthly narrowbody ASKs scheduled beyond 3,000 nm

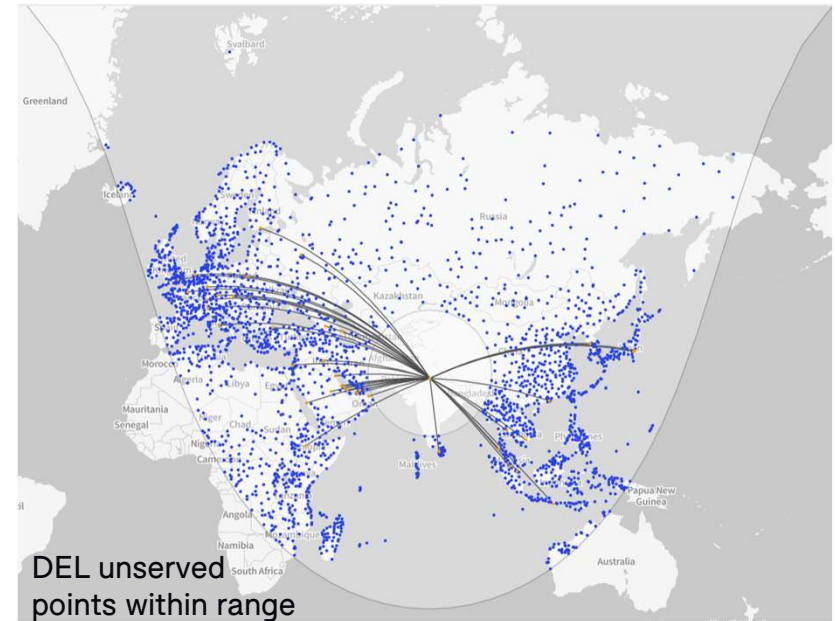
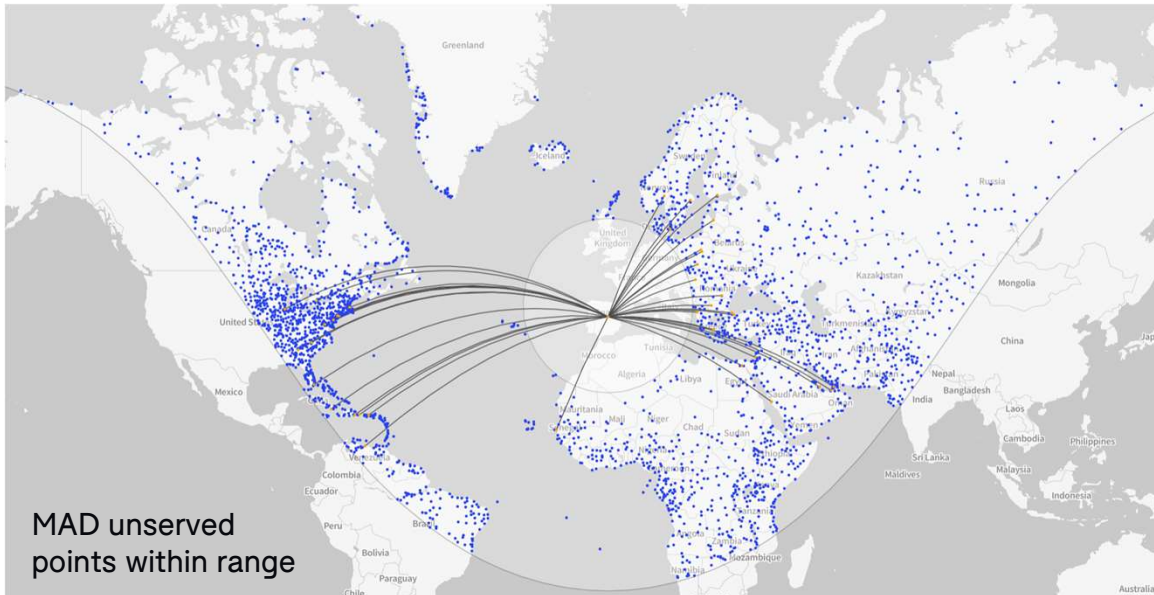
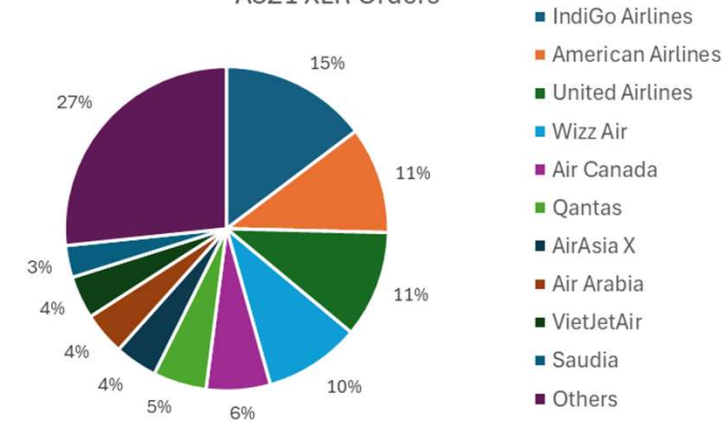


UNSERVED DESTINATIONS IN A321 XLR RANGE

➤ There are 496 A321-XLRs on order, with the first deliveries due to begin later this year to IAG who plan to deploy them on Iberia routes, on Madrid – Boston, and to Washington allowing it to operate year round from a seasonal operation currently.

➤ The Iberia A321-XLRS will have 182 seats and two cabins but no premium economy

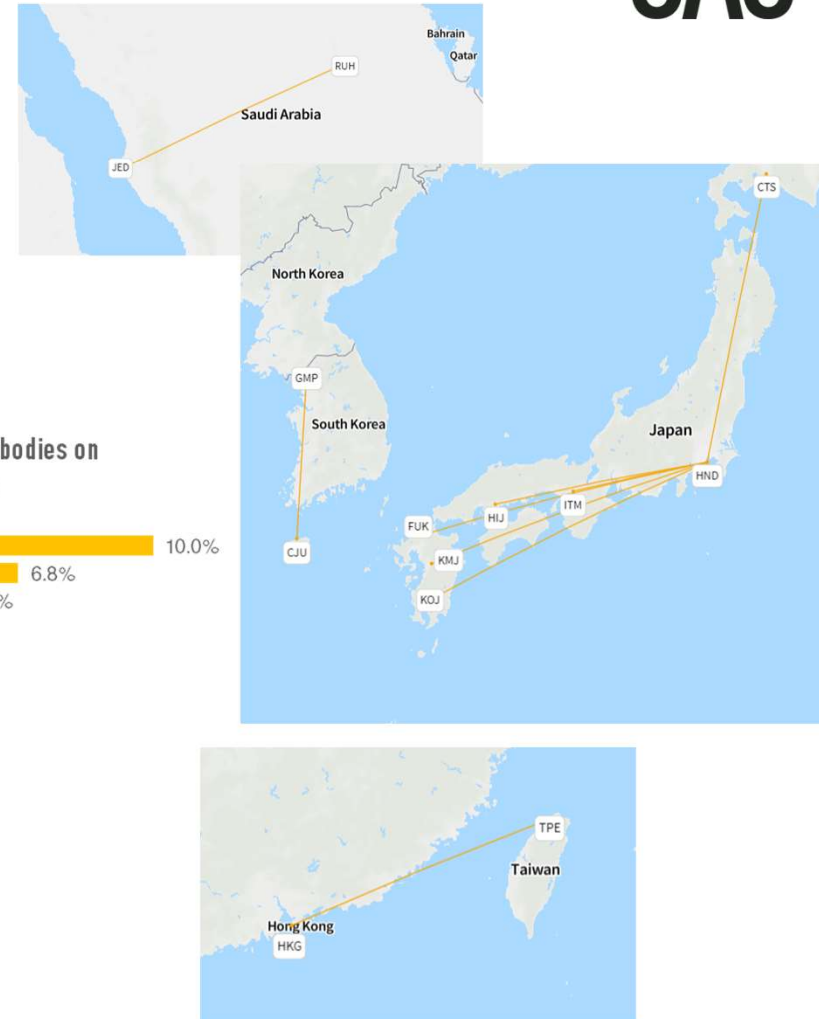
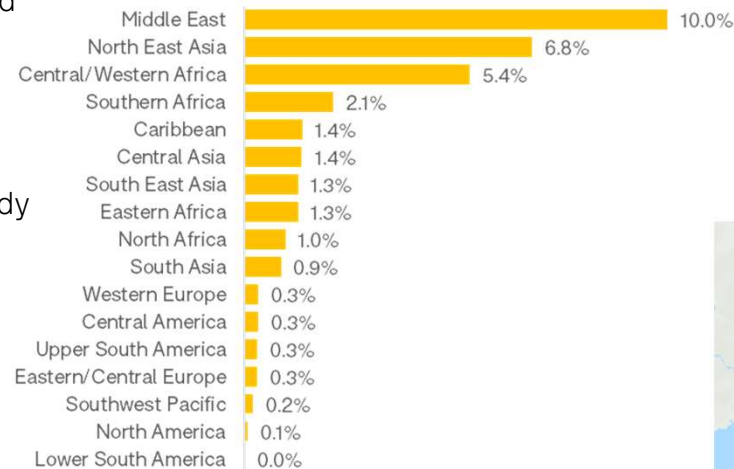
A321 XLR Orders



AND THE SHORTEST WIDEBODY ROUTES...

- In the Middle East, 10% of flights under a distance of 1000km are operated by widebody aircraft. In North East Asia the share is 6.8%.
- Japan dominates in the use of widebodies on short sectors, with 6 of the top 10 widebody routes globally by the number of flights operating short domestic sectors – interesting when you consider Japan also has an extensive high speed rail network! Averaging just 400 miles for each route and 1 h 30 of flying time, they offer a competitive alternative to rail, and allow frequent flyers to collect loyalty points.
- Almost all of the Top 10 widebody routes operate within Asia, with one exception – the key Saudi domestic trunk route between Jeddah and Riyadh – where Saudia operate a mix of Airbus A330s, Boeing 777's and some B787-900s, averaging 335 seats per widebody movement
- In Japan the Boeing 767 and 787 are most popular accounting for 38% and 35% of widebody capacity on domestic routes.

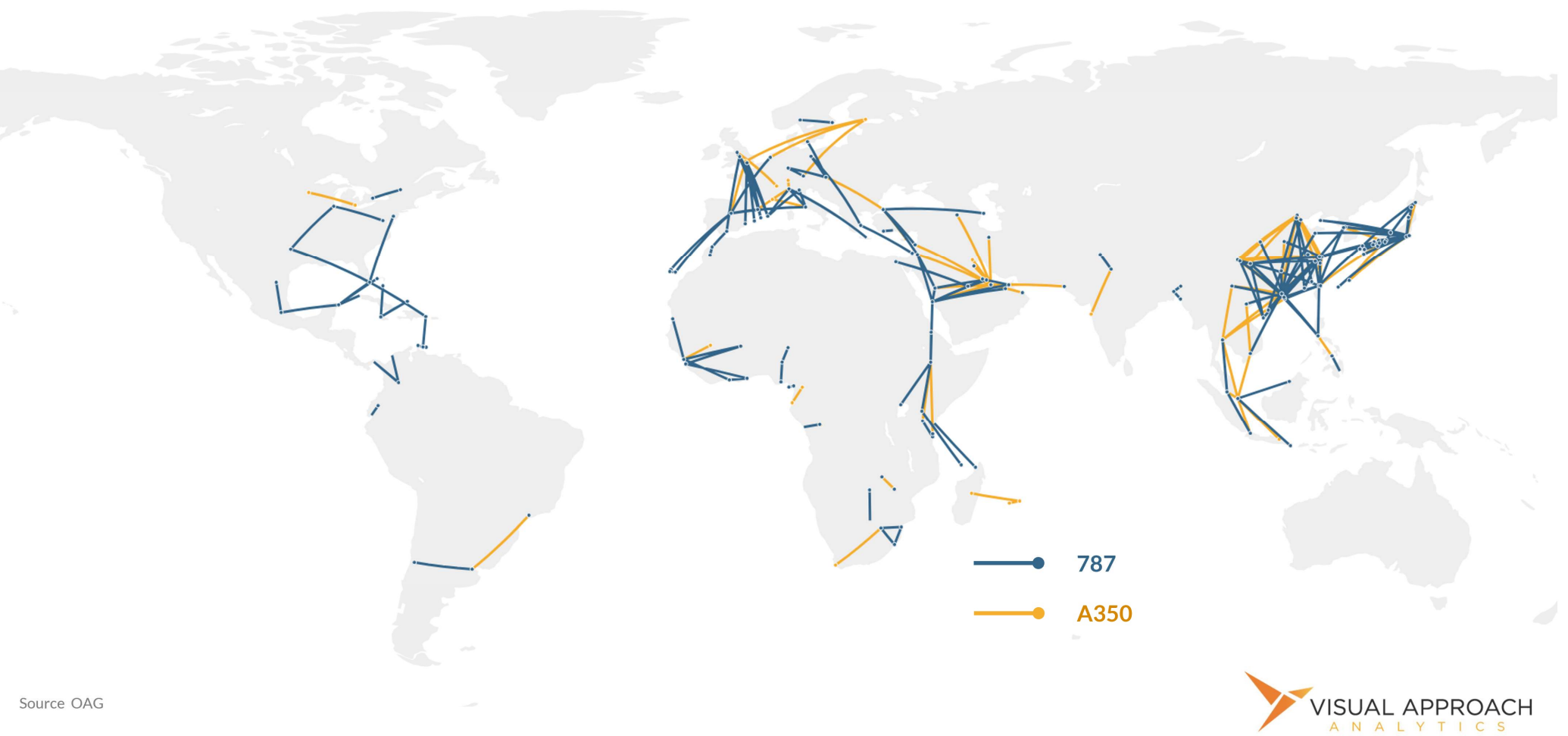
Share of Flights operated on Widebodies on journeys under 1000km



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Flying short-haul with long-haul specialists
(787 and A350 routes shorter than 1,000 nautical miles, June 2024 schedule)

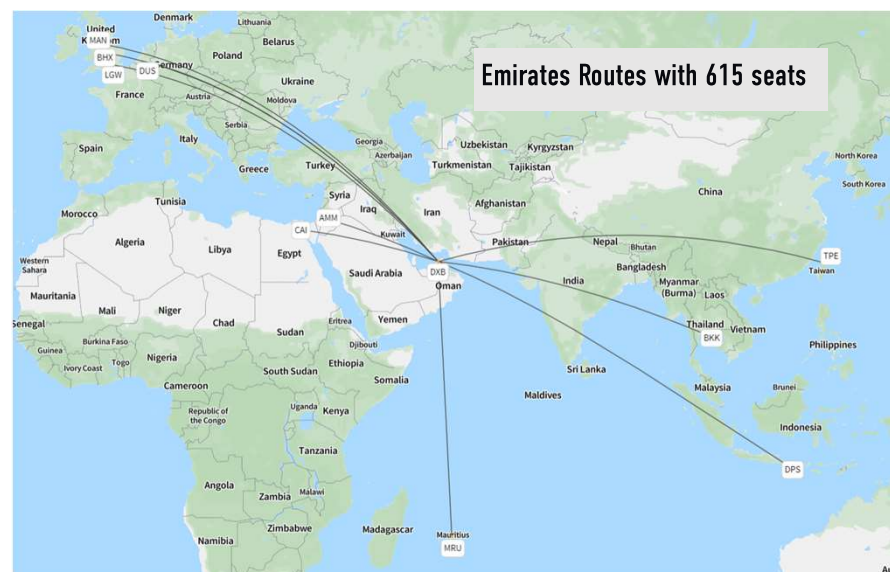
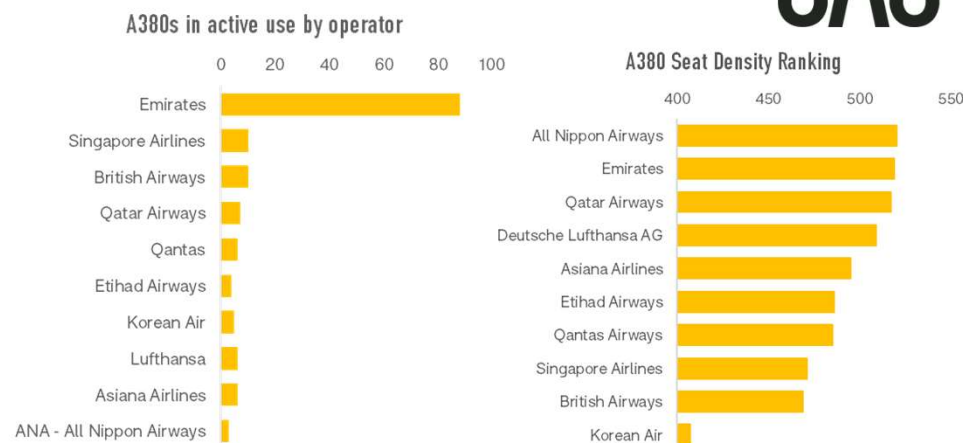


Source OAG

MOST SEATS ON THE AIRCRAFT

- The A380 is the largest passenger aircraft in service
- 10 carriers currently have A380's in operation with seat configurations ranging from Korean Air with 470 seats to ANA squeezing in the most with 520. The average is 499 with Asiana sitting right at the midpoint.
- There are currently 217 A380's in the global fleet, with 145 of these in active use. 24 are out for maintenance and 48 are in storage.
- Emirates have the second highest seat density on the A380 with an average of 518 seats although across the fleet they have 7 different configurations ranging from 484 to 615. Emirates have 12 A380's with the 615 configuration – 557 seats in economy and 58 in business.
- This week these Emirates high gauge A380s are operating on 10 routes across their network

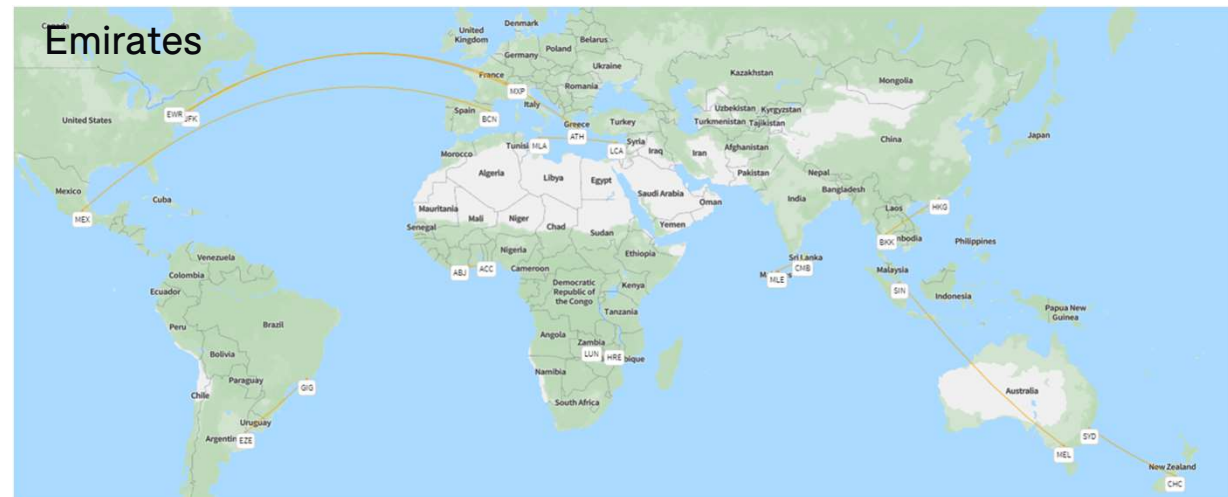
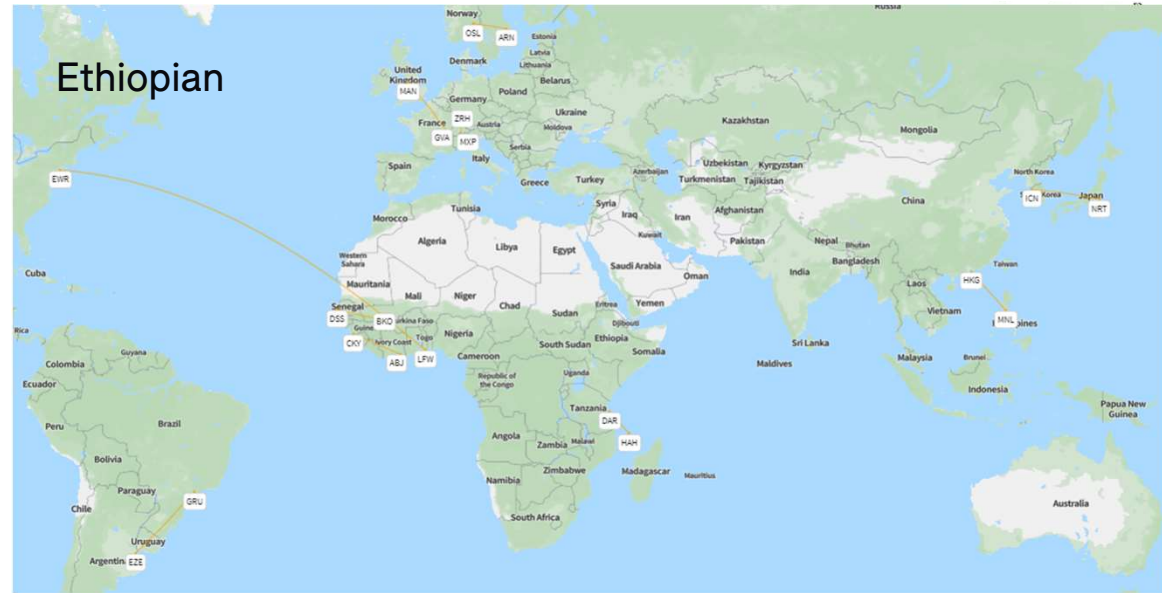
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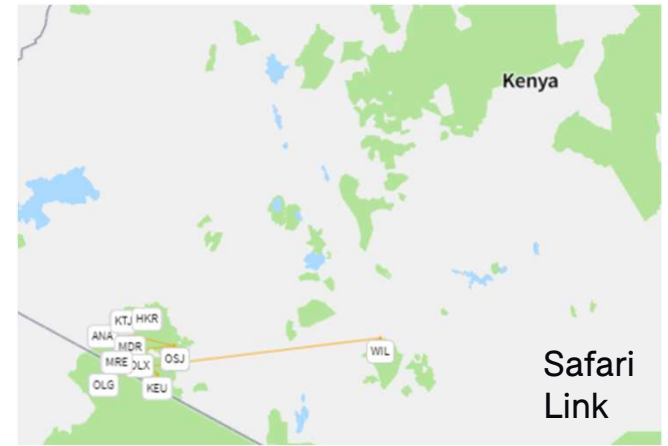
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Fifth Freedom routes by carrier - 2023



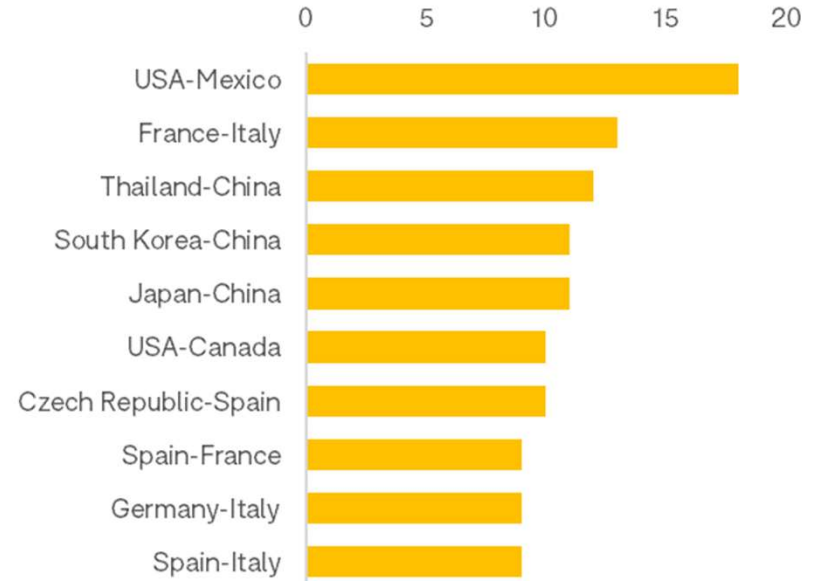
ROUTES WITH MOST STOPS



WHERE IS EVERYONE GOING THIS SUMMER?

- The new Tulum airport in the Yucatan Peninsula, south of Cancun in Mexico means the USA-Mexico tops the list of the country pairs with most new routes this summer. There are 18 new routes between the USA and Mexico, with 9 of those operating to Tulum from points across the US. Monterrey is also popular, with three new routes there from Orlando, Denver and Miami.
- France – Italy sees the next highest increase in new routes this summer, with 13 routes added. Both Ryanair and Volotea are driving growth – Ryanair from Beauvais to points across Italy including Rome, Catania in Sicily, and Olbia in Sardinia, whilst Volotea are adding capacity between Bordeaux and Brest to Palermo, Trieste, Verona and Olbia
- Italy is also experiencing new route growth from Germany and Spain.
- There is also ongoing recovery taking place in Asia where routes between China and Thailand, South Korea and Japan are coming back this summer for the first time since 2019.

Country Pairs with the most
New Routes this summer



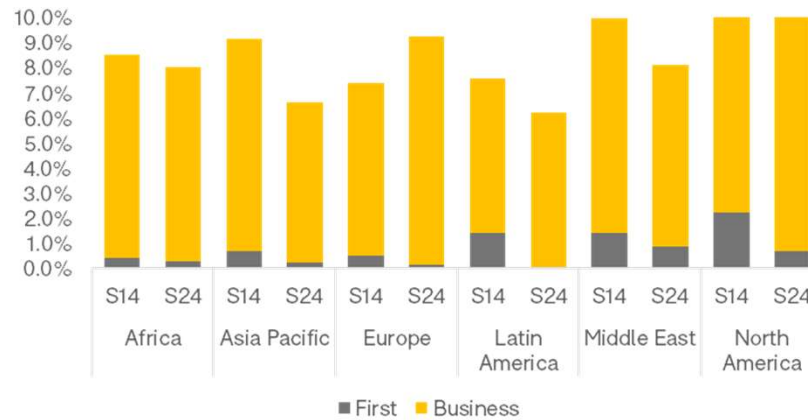
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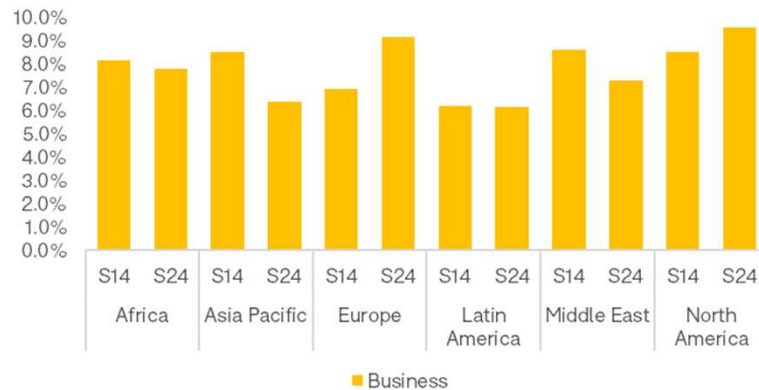
WHO IS SITTING WHERE?

➤ Over the last decade and especially since the pandemic we've seen a shift from first to business. This is most evident in North America, although in percentage terms fairly small with a shift of 2.2% to 0.7% in first class share of capacity. This equates to a reduction of 1.1m seats

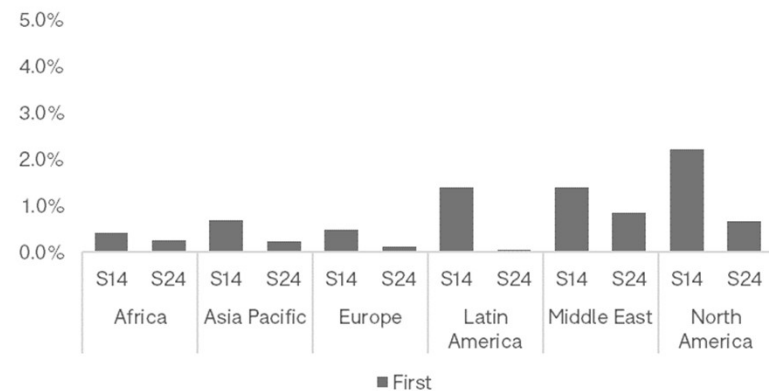
Capacity Share in Premium Cabin by Region



Capacity Share in Premium Cabin by Region



Capacity Share in First Cabin by Region



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CARGO ... FLOWERS, FISH AND SHELLFISH ARE IMPORTANT!

- Live lobsters! 16,000 Tonnes exported from Halifax St Johns in 2022 valued at US\$293 million. Major destinations included China and Europe.
- Circa 90% of the world's asparagus produced in Peru – 97,000 Tonnes valued at US\$382 million of which the USA (72,000) and Spain (10,000) were major markets.
- Security of aviation – safer than trucking
- US express carriers – Fedex “position” up to six aircraft a night waiting for confirmation of where additional capacity required and move accordingly
- LAN send an aircraft north with live salmon from Santiago and once they know what the spot price is of flowers v asparagus they select the product that generates the best return



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Quirky quiz – no prizes, just avgeek status at stake!

- Which UK Emirates destination is the only route in Emirates network to stock a distinctive ale?
- Which is the most isolated airport in the world?
- Who is the operator of the oldest aircraft still in regular service
- How many stops does the route with most stops have?
- Who can name the country which has the airport with the highest altitude in the world? And bonus points for their altitude..
- Which two countries with big populations are there no flights between? No flights between India and China
- Why do Canadian Airport codes start with a Y?



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Quirky quiz – no prizes, just avgeek status at stake!

- Which UK Emirates destination is the only route in Emirates network to stock a distinctive ale?
Newcastle
- Which is the most isolated airport in the world?
St Helena or Mataverí (Easter Island)
- Who is the operator of the oldest aircraft still in regular service?
Maldivian with a 54 year old Twin Otter!
- How many stops does the route with most stops have?
10 – SafariLink in Kenya who operate from Nairobi Wilson
- Who can name the country which has the airport with the highest altitude in the world? And bonus points for the altitude..
China – 6 airports over 4,000m high with the highest Daocheng Yading (DCY) at 4,411m elevation
- Which two countries with big populations are there no flights between?
No flights between India and China, China and Brazil and Brazil and Indonesia.
- Bonus question - Why do Canadian Airport codes start with a Y?
Y denoted Yes for there being a weather station – which almost all Canadian airports have.



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Quirky facts

- Last one!
- The biggest aircraft ever to land in Antarctica



<https://eu.usatoday.com/story/travel/airline-news/2023/11/17/boeing-787-dreamliner-biggest-plane-antarctica/71621525007/>



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