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Annexure A– List of Qantas’ related bodies corporate covered by this application

| Entities | Country of Incorporation |
|---|--------------------------|
| AAL Aviation Limited | Australia |
| Australian Regional Airlines Pty. Ltd. | Australia |
| Regional Airlines Charter Pty Limited | Australia |
| Network Aviation Pty Ltd | Australia |
| Network Aviation Holdings Pty Ltd | Australia |
| Network Holding Investments Pty Ltd | Australia |
| Network Turbine Solutions Pty Ltd | Australia |
| Osnet Jets Pty Ltd | Australia |
| Sunstate Airlines (Qld) Pty. Limited | Australia |
| Airlink Pty Limited | Australia |
| National Jet Systems Pty Ltd | Australia |
| National Jet Operations Services Pty Ltd | Australia |
| Eastern Australia Airlines Pty. Limited | Australia |
| Impulse Airlines Holdings Proprietary Limited | Australia |
| Jetstar Airways Pty Limited | Australia |
| Jetstar Airways Limited | New Zealand |
| Jetstar Group Pty Limited | Australia |
| Jetstar Holidays Co. Ltd. | Japan |
| Jetstar NZ Regional Limited | New Zealand |
| Australian Airlines Limited | Australia |
| Jetstar Services Pty Limited | Australia |
| Qantas Group Accommodation Pty Ltd | Australia |
| Jetconnect Limited | New Zealand |
| Jetstar Asia Holdings Pty Limited | Australia |

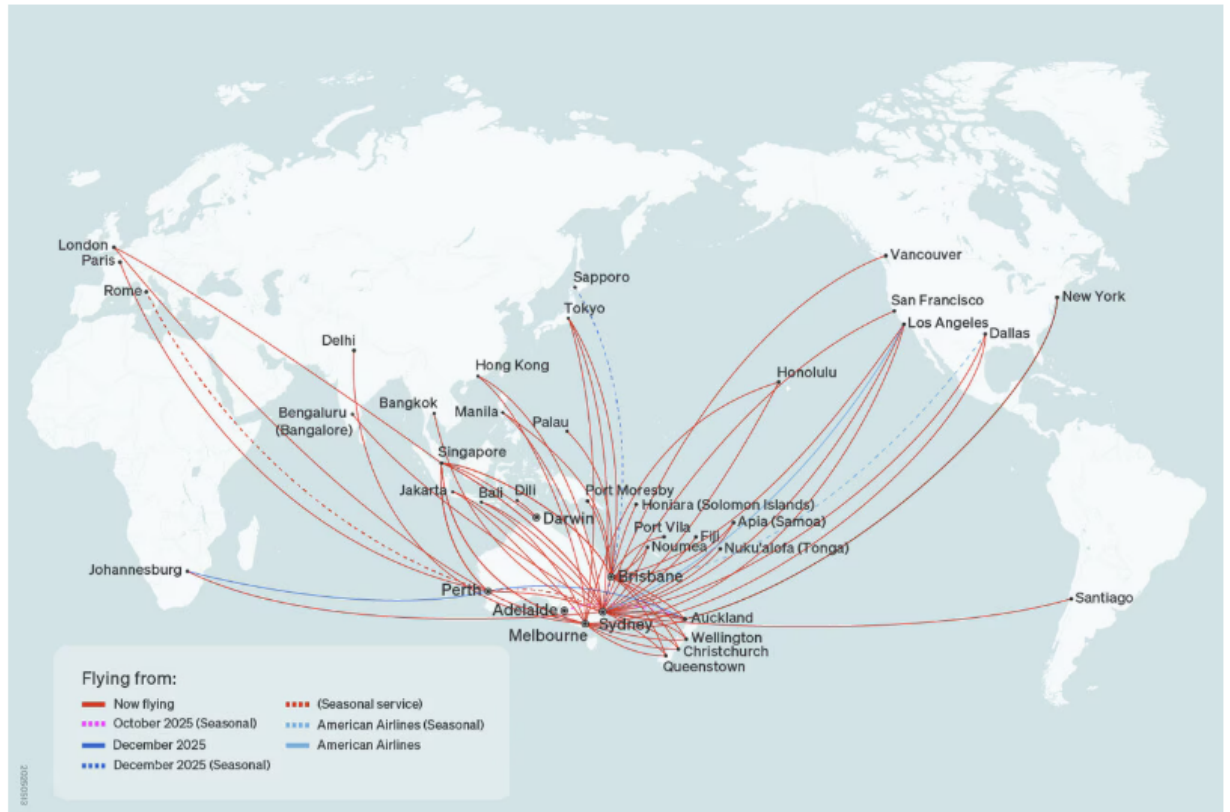
| Entities | Country of Incorporation |
|---|--------------------------|
| Newstar Investment Holdings Pte. Ltd. | Singapore |
| Orangestar Investment Holdings Pte. Ltd. | Singapore |
| Jetstar Asia Airways Pte. Ltd. | Singapore |
| Valuair Limited | Singapore |
| Jetstar International Group Australia Pty. Limited | Australia |
| Jetstar Regional Services Pte. Ltd. | Singapore |
| Jetstar International Group Japan Co., Limited | Japan |
| Q H Tours Ltd | Australia |
| Holiday Tours & Travel Pte. Ltd. | Singapore |
| H Travel Sdn Bhd | Malaysia |
| Hangda Ticket Agent (Shanghai) Co. Ltd | China |
| Holiday Tours & Travel Ltd | Taiwan |
| HTT Travel Vietnam Limited liability Company | Vietnam |
| Holiday Tours & Travel (Korea) Limited | Korea |
| Holiday Tours & Travel (Singapore) Pte. Ltd. | Singapore |
| QH International Co. Limited. | Japan |
| Qantas Asia Investment Company Pty Ltd | Australia |
| Qantas Cabin Crew (UK) Limited | United Kingdom |
| Qantas Airways Domestic Pty Limited | Australia |
| Qantas Domestic Pty Limited | Australia |
| Qantas Freight Enterprises Limited | Australia |
| Express Freighters Australia Pty Limited | Australia |
| Australian Air Express Pty Ltd | Australia |
| Express Freighters Australia (Operations) Pty Limited | Australia |
| Qantas Road Express Pty Limited | Australia |
| Qantas Courier Limited | Australia |
| Qantas Freight Terminals Pty Limited | Australia |

| Entities | Country of Incorporation |
|--|--------------------------|
| Qantas Frequent Flyer Limited | Australia |
| Qantas Frequent Flyer Operations Pty Limited | Australia |
| Taylor Fry Holdings Pty Limited | Australia |
| Taylor Fry Pty Limited | Australia |
| VII Pty Limited | Australia |
| TAD Holdco Pty Ltd | Australia |
| Trip A Deal Holdings Pty Ltd | Australia |
| Trip A Deal Pty Ltd | Australia |
| TRIPADEAL(NZ) LIMITED | New Zealand |
| Phone A Flight Pty Ltd | Australia |
| Qantas Ground Services Pty Limited | Australia |
| Qantas Group Flight Training Pty Limited | Australia |
| Qantas Group Flight Training (Australia) Pty Limited | Australia |
| Qantas Information Technology Ltd | Australia |
| Qantas Superannuation Limited | Australia |
| Qantas Ventures Pty Limited | Australia |
| Qantas Climate Fund Investment 1 Pty Ltd | Australia |
| Qantas Climate Fund Investment 2 Pty Ltd | Australia |
| Qantas SAFFA Pty Limited | Australia |
| Qantas Wheatbelt Connect Pty Limited | Australia |
| QF A332 Leasing 1 Pty Limited | Australia |
| QF A332 Leasing 2 Pty Limited | Australia |
| QF BOC 2008-1 Pty Limited | Australia |
| QF BOC 2008-2 Pty Limited | Australia |
| QF Cabin Crew Australia Pty Limited | Australia |
| QF Dash 8 Leasing No. 4 Pty Limited | Australia |

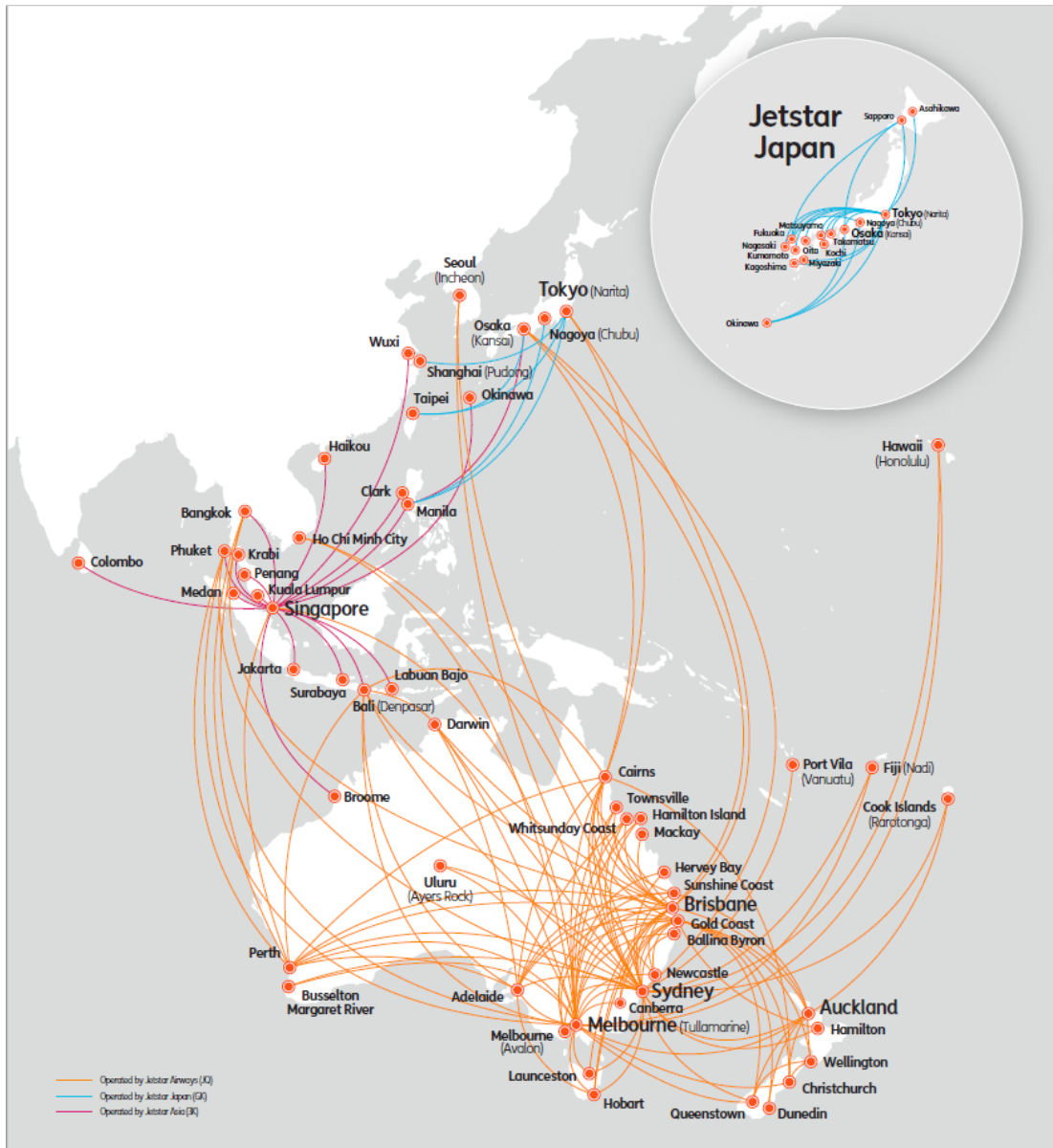
| Entities | Country of Incorporation |
|---------------------------------------|--------------------------|
| QF Dash 8 Leasing No. 5 Pty Limited | Australia |
| QF Dash 8 Leasing No. 6 Pty Limited | Australia |
| QF ECA 2008-1 Pty Limited | Australia |
| QF ECA 2008-2 Pty Limited | Australia |
| QF ECA A380 2010 No.1 Pty Limited | Australia |
| QF ECA A380 2010 No.2 Pty Limited | Australia |
| QF ECA A380 2010 No.3 Pty Limited | Australia |
| QF ECA A380 2010 No.4 Pty Limited | Australia |
| QF ECA A380 2011 No.1 Pty Limited | Australia |
| QF ECA A380 2011 No.2 Pty Limited | Australia |
| QF EXIM B787 No. 1 Pty Limited | Australia |
| QF EXIM B787 No. 2 Pty Limited | Australia |
| QGHC 1 Pty Limited | Australia |
| Southern Cross Insurances Pte Limited | Singapore |

Annexure B– Qantas Group Network Maps

Qantas



Jetstar*




*Note: Jetstar Asia (routes with purple line) has closed.

Annexure C – Joint training exercise

In October 2024, Qantas and American participated in the triennial full-scale emergency response exercise at American Airlines' key North American hub, Dallas Fort Worth. Below is a copy of the internal communication about the training exercise:

Posted in All Company

**Jaclyn Kinnane**
Oct 11, 2024 • @J3

2 shares • Seen by 1,922 • ...

Practicing is such an important part of what our airport teams do for emergency response. These initial moments in an incident when our Station Emergency Response Plans are activated are most important. This year, Qantas was invited to participate in the Dallas Fort Worth triennial full scale exercise as the affected carrier. This event had more than 9 months of planning, 500 participants on the day, 70+ actors transported to hospitals, 13 hospitals activated, 20 ambulances, 1 AmBus (because it's Texas) and multiple fire units and law enforcement.





[Paul Knuth](#) and his local DFW team built on the first part of the exercise in August and made changes for October. They did such a good job! Also, thank you to the support teams - Americas Airports, Americas QF Corp Comms, LAX Engineering. In addition to working closely with DFW Airport and American Airlines as our mutual assistance partner, we also ran our notification process with the National Transportation Safety Board (NTSB) TDA division which activated American Red Cross.


In Sydney we ran a small 'mock' CMT from midnight to 0400. This was a great opportunity to test the communication to and from DFW.


Thank you to everyone involved it was a great success.


WARNING - below are some photos from the exercise, including the aircraft trainer that was set on fire and actors who were moulaged for the event.




see less



 Thank

 Comment

 Share ▾

   You and 53 others

Annexure D – Market share data for air cargo

Table 1: Total Share of Freight and Mail:¹ US TO NEW ZEALAND, 2020-2024

| Calendar Year | Qantas | American | Total QF + AA |
|---------------|--------|----------|---------------|
| 2020 | 16.9% | 0.5% | 17.4% |
| 2021 | 11.9% | 0.0% | 11.9% |
| 2022 | 12.8% | 0.1% | 12.9% |
| 2023 | 7.0% | 0.3% | 7.3% |
| 2024 | 7.2% | 0.6% | 7.9% |

Table 2: Total Volumes of Freight and Mail:² US TO NEW ZEALAND, 2020-2024

| Calendar Year | Qantas (T) | American (T) | Total QF + AA (T) |
|---------------|------------|--------------|-------------------|
| 2020 | 3,858 | 120 | 3,978 |
| 2021 | 3,055 | - | 3,055 |
| 2022 | 4,268 | 26 | 4,294 |
| 2023 | 3,570 | 135 | 3,705 |
| 2024 | 4,151 | 361 | 4,512 |

Source: US Department of Transport

Note: Data from New Zealand to the US is not provided as this data is not collected by the US Department of Transport.

¹ Together, 'Freight and Mail' constitute cargo.

² Ibid.

Annexure E – Competitor information

1. Air New Zealand

- 1.1 Air New Zealand is the flag carrier airline of New Zealand, headquartered in Auckland, and is the leading provider of air transport services to / from New Zealand, including on Trans-Pacific routes. The airline operates a global network that provides, amongst other things, air passenger services to, from, and within New Zealand. Each year, Air New Zealand flies more than 15 million passengers on its network, offering over 3,400 flights a week to 49 domestic and international destinations,³ including those between New Zealand and Australia, and to / from the US and Canada.
- 1.2 Air New Zealand is a member of the Star Alliance, the largest global airline alliance. Beyond its direct domestic network, the airline's international strategy focuses on the Trans-Pacific and Asia, with expanded coverage direct flights to destinations covered by its alliance partners. Its key alliance relationships include partners across the United States, Singapore, Hong Kong and China,⁴ including an alliance with United that covers flights between the mainland US and New Zealand, including feeder flights within the US and New Zealand.⁵ Air New Zealand also has an alliance with Air Canada,⁶ and offers flights between Melbourne or Sydney and Vancouver via Auckland.⁷
- 1.3 Air New Zealand's commitment to Trans-Pacific travel, including between New Zealand and the US, over the years has been strong. For example, in 2022, Air New Zealand relaunched several international routes, including direct services to San Francisco, Honolulu, Houston, Adelaide, Cairns, Hobart, and the Sunshine Coast.⁸ Greg Foran, Chief Executive Officer of Air New Zealand, emphasised the airline's commitment to restoring and expanding its network stating that: *'We're seeing firsthand how keen people are to travel again, particularly across the Tasman. Come July, we will double our services across the Tasman and restart popular direct services like the Sunshine Coast, Hobart, and Adelaide.'*⁹
- 1.4 In the same year, Air New Zealand also, amongst other things, resumed flights to nine major Australian airports as well as Chicago, launched a new non-stop service between Auckland and New York and increased capacity between Auckland and Los Angeles, demonstrating its dedication to further strengthening its presence on the Trans-Pacific.¹⁰
- 1.5 This was reinforced in 2024 when Air New Zealand recommenced its seasonal service between Auckland and the Sunshine Coast. Commenting on this, Air New Zealand General Manager International Jeremy O'Brien highlighted that *'Australia is an incredibly important market for Air New Zealand. This seasonal service will also provide more opportunities for our Aussie customers*

³ See <https://www.airnewzealand.co.nz/corporate-profile>.

⁴ See <https://www.airnewzealand.co.nz/corporate-profile>.

⁵ See <https://www.airnewzealand.com/united-airlines-co-operation>.

⁶ See [Air Canada - Star Alliance | Air New Zealand – Australia](#).

⁷ See [Find & book flights to Canada with Air NZ](#).

⁸ See <https://www.airnewzealandnewsroom.com/press-release-2022-airnz-the-sky-is-the-limit-airnz-to-relaunch-14-international-routes-in-16-days>, and <https://www.airnewzealandnewsroom.com/press-release-2022-air-new-zealand-resumes-flights-to-more-north-american-destinations>.

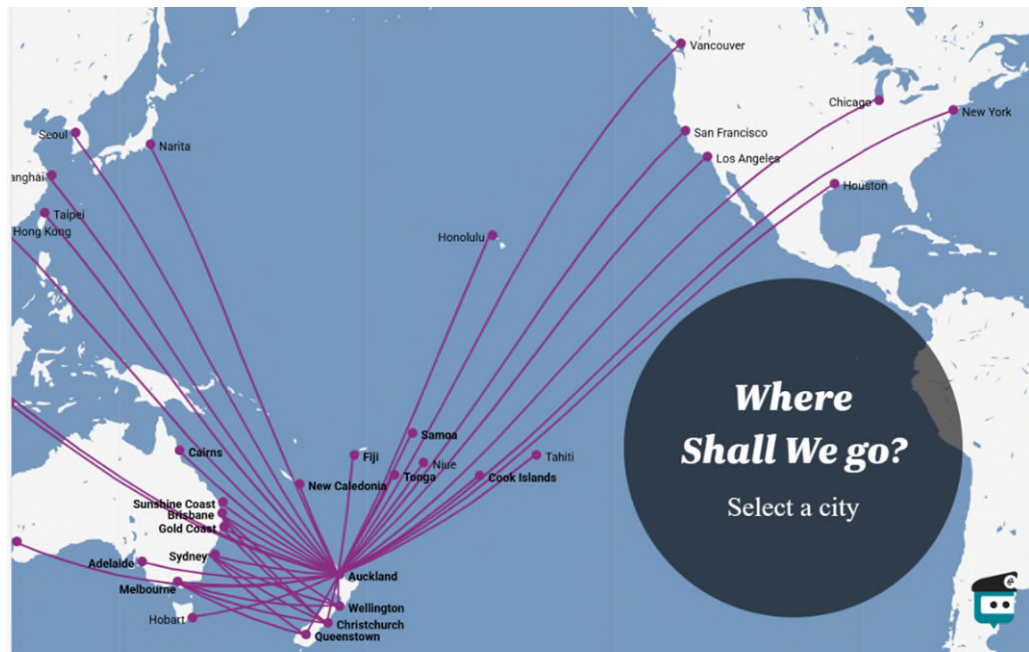
⁹ See <https://www.airnewzealandnewsroom.com/press-release-2022-airnz-the-sky-is-the-limit-airnz-to-relaunch-14-international-routes-in-16-days>.

¹⁰ See <https://www.airnewzealandnewsroom.com/press-release-2022-airnz-the-sky-is-the-limit-airnz-to-relaunch-14-international-routes-in-16-days>, <https://www.airnewzealand.co.nz/press-release-2022-airnz-is-off-to-the-big-apple#:~:text=Today%2C%20Air%20New%20Zealand%20has,on%2017%20September%20this%20year.&text=Landing%20at%20John%20F.,Boeing%20787%2D9%20Dreamliner%20aircraft>, <https://www.airnewzealandnewsroom.com/press-release-2022-airnz-increases-capacity-to-los-angeles-and-seoul>, and <https://www.airnewzealandnewsroom.com/press-release-2022-air-new-zealand-says-hello-to-chicago-once-again-and-celebrates-reopening-of-all-international-ports>.

to head across the ditch and enjoy New Zealand's snowy mountains and winter escapes.'¹¹ Over winter, Air New Zealand flies to seven other destinations in Australia, including Sydney, Brisbane, Melbourne, Perth, Adelaide, Cairns, and the Gold Coast.

- 1.6 2024 also saw Air New Zealand celebrating 20 years of linking New Zealanders with San Francisco, with Mr O'Brien confirming that San Francisco has been a popular route for both Kiwi travellers and US customers heading to New Zealand. In addition to flying to San Francisco, Air New Zealand currently operates flights to Honolulu, Los Angeles, Houston, and New York with connections to over 100 domestic US destinations with its alliance partner United.¹²

- 1.7 Air New Zealand's route map, highlighting its Trans-Pacific offering, is shown below:



Flights to USA

Whether it's the larger than life cities like Los Angeles, New York and Las Vegas or the iconic places and attractions like the Grand Canyon, Disney World and the White House the USA has some of the best travel experiences the world has to offer.

Find lowest fares for top destinations in United States

Los Angeles

Visit the entertainment capital of the world that's also known for idyllic year-round weather.

Find flights to Los Angeles

San Francisco

The Golden Gates welcome you to the city of cable cars, a sparkling bay, and streets lined with elegant Victorian homes.

Find flights to San Francisco

Houston

As America's fourth largest city, Houston has always been a big deal. Experience Texan hospitality in the home of space travel.

Find flights to Houston

Chicago

Outstanding architecture, art, food and sport - these are the things that make Chicago magnificent.

Find flights to Chicago

Honolulu

Hawaii is where the culture of Polynesia meets the energy of the USA, where sun-kissed beaches meet world-class shopping.

Find flights to Honolulu

New York

Watch Broadway shows, visit world-renowned art museums and enjoy breathtaking views of the Manhattan skyline.

Find flights to New York

- 1.8 Air New Zealand actively promotes its Trans-Pacific offering to Australian and New Zealand consumers, including via its website and other marketing channels, and use of press release for tactical campaigns and associated media coverage. Examples are set out below:

¹¹ See <https://www.airnewzealandnewsroom.com/press-release-2024-hello-sunshine-air-new-zealands-seasonal-service-to-the-sunshine-coast-returns>.

¹² See <https://www.airnewzealandnewsroom.com/from-the-harbour-bridge-to-the-golden-gate-celebrating-20-years-of-connecting-auckland-and-san-francisco>.

\$1200 flights to the US on offer in Air New Zealand sale

By [Kristine Tarbert](#) | 4 weeks ago

Air New Zealand has just launched their [New Year Sale](#), featuring incredible fares to New Zealand and the US.

Fares across the ditch start at just \$267, while [flights](#) to the [US](#) are available from as little as \$1258.

There are dozens of destinations currently on offer, including [Los Angeles](#), [Honolulu](#), New York, Auckland, and Christchurch.

2. United Airlines

- 2.1 United is an American airline headquartered in Chicago, Illinois. It operates a large domestic and international route network, spanning cities across the United States and around the world. United is the leading carrier across the Atlantic and Pacific, offering direct flights to international cities in Asia and Australia, New Zealand, Europe, Latin America, the Middle East and Africa.¹³
- 2.2 United is a founding member of the Star Alliance, a global airline alliance, whose entire network provides service to nearly 200 countries.¹⁴ Moreover, and of relevance to this Application, United has strategic partnerships with Air New Zealand and Virgin Australia that enable more travel options between New Zealand, Australia, and the Americas, through codeshare flights and reciprocal loyalty benefits.¹⁵
- 2.3 United offers flights to more than 210 destinations in the US and over 120 international destinations across five continents, operating more than 4,500 flights daily, with major hubs in cities like Chicago, Denver, Houston, New York/Newark, Los Angeles, San Francisco, and Washington, D.C.¹⁶
- 2.4 United is a significant and substantial competitor on the Trans-Pacific, with a strong and committed presence, including with respect to New Zealand. This focus on maintaining and growing its Trans-Pacific presence is evidenced over the recent years by, for example, United's launch of new flights between New Zealand, Australia and the US in 2023 which included the first non-stop flight between San Francisco-Christchurch, a Los-Angeles-Auckland service and a Los-Angeles-Brisbane service. In addition to adding new flights to its schedule, United also increased its flying from San Francisco to Brisbane and Sydney.¹⁷ Examples of United's promotional material associated with the launch of the San Francisco-Christchurch route in 2023 are set out below:¹⁸

¹³ See <https://www.united.com/en/us/newsroom/corporate-fact-sheet.html#whoWeAre>.

¹⁴ See <https://www.united.com/en-us/flights>.

¹⁵ See <https://www.united.com/en/au/fly/mileageplus/earn-miles/airline-partners.html>; and <https://www.virgin.com/about-virgin/latest/virgin-australia-and-united-airlines-announce-partnership>, and See <https://www.airnewzealand.com/united-airlines-co-operation>; and <https://www.airnewzealand.com/star-alliance-united>.

¹⁶ See <https://www.united.com/en-us/flights>.

¹⁷ See <https://united.mediaroom.com/2023-04-18-United-Announces-Largest-South-Pacific-Expansion-in-Aviation-History-Including-New-Direct-Flight-to-Christchurch-New-Zealand>; and <https://www.united.com/en/us/newsroom/announcements/cision-125302>.

¹⁸ See <https://travelweekly.com.au/united-makes-u-s-aviation-history-with-new-direct-flights-from-san-francisco-to-christchurch/>.

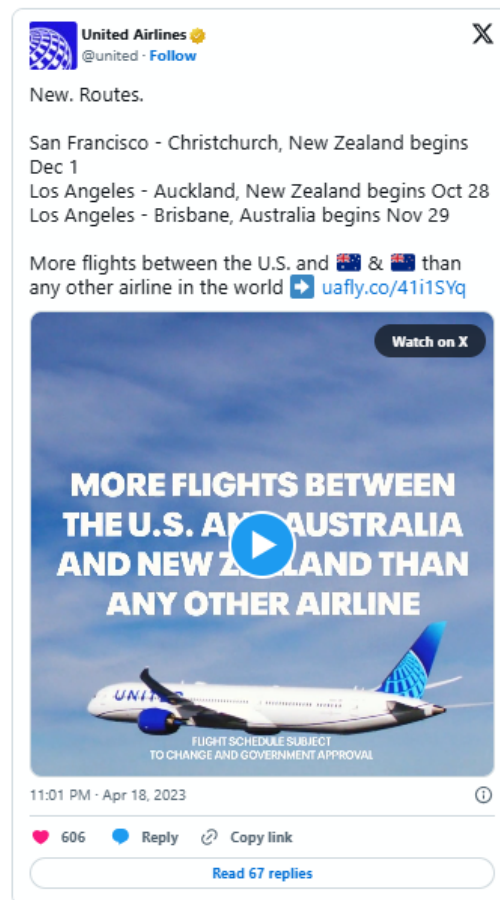


- 2.5 This expansion formed part of United's broader strategy to increase its footprint on the Trans-Pacific, and provide more travel options for passengers between New Zealand, Australia and the US. At the time of the launch, Patrick Quayle, Senior Vice President of Global Network Planning and Alliances at United explained that:

*'This past winter, United enhanced our network and became the largest carrier to the South Pacific region. Now, this upcoming winter, we will expand even further...Our strong partnerships with Air New Zealand and Virgin Australia provide unparalleled connectivity, and with our historic expansion across five destinations in New Zealand and Australia, United is the clear choice for customers' travel to the region.'*¹⁹

¹⁹ See <https://united.mediaroom.com/2023-04-18-United-Announces-Largest-South-Pacific-Expansion-in-Aviation-History,-Including-New-Direct-Flight-to-Christchurch,-New-Zealand>.

- 2.6 In parallel, United actively marketed itself on social media as the airline with 'more flights between the US and Australia and New Zealand than any other airline':

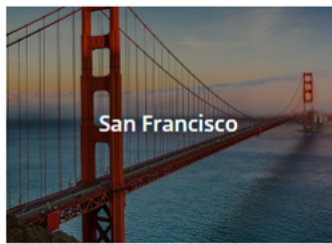


- 2.7 In 2024, United made some limited capacity cuts on Trans-Pacific routes at the margins, and announced it would not operate its seasonal routes from Los Angeles to Auckland and Brisbane that peak season. In an interview, United Airlines Regional Manager Australia, New Zealand and Tahiti, Tim Wallis confirmed the changes were about 'right-sizing' within the United fleet and 'best maximising' aircraft for the early and late parts of the Northern Winter – which spans November 2024 to late March 2025, and emphasised United is still committed to 'holding that place in the market'.²⁰ Despite the reductions announced in 2024, United continues to have significant and highly competitive operations across the Trans-Pacific, and has demonstrated a return to expanding its operations. In fact, these adjustments have ensured that United is a very effective and efficient substantial competitor in New Zealand with a finely curated, fit for purpose, offering. United's commitment and market stature has been further evidenced by the recent announcement that it will launch a new non-stop flight between Adelaide-San Francisco, commencing in December 2025 – a first for any US airline and for Adelaide and which has never previously had a direct service to the United States.²¹
- 2.8 United actively promotes its Trans-Pacific offering to New Zealand and Australian consumers, including via its website and other marketing channels, and use of press release for tactical campaigns and associated media coverage. Examples are set out below:

²⁰ See <https://karryon.com.au/industry-news/airline/united-airlines-trims-au-link/>.

²¹ See United Airlines Launches Nonstop Flights to Adelaide – A US First (2 April 2025). Available: <https://flighthacks.com.au/united-airlines-launches-flights-to-adelaide/>.

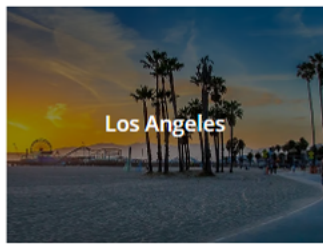
Fly from New Zealand to United's most popular destinations



Flights to San Francisco (SFO)

| | |
|-------------------------|---------------------|
| From Auckland (AKL) | From |
| 06/05/2025 - 20/05/2025 | NZ \$ 1,839 * |
| Roundtrip Economy | Viewed: 2 hours ago |

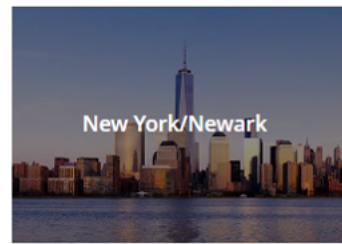
[See more](#)



Flights to Los Angeles (LAX)

| | |
|-------------------------|---------------------|
| From Auckland (AKL) | From |
| 15/05/2025 - 19/05/2025 | NZ \$ 1,789 * |
| Roundtrip Economy | Viewed: 3 hours ago |

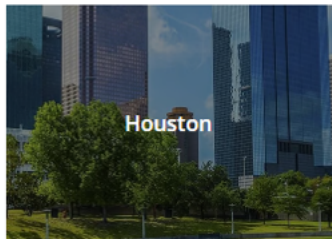
[See more](#)



Flights to New York/Newark (EWR)

| | |
|-------------------------|---------------------|
| From Auckland (AKL) | From |
| 27/05/2025 - 03/06/2025 | NZ \$ 2,249 * |
| Roundtrip Economy | Viewed: 3 hours ago |

[See more](#)

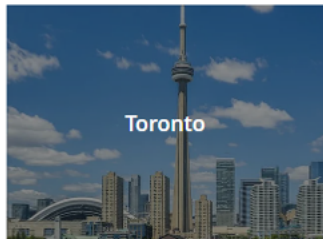


Flights to Houston (IAH)

| | |
|-------------------------|---------------------|
| From Auckland (AKL) | From |
| 28/05/2025 - 01/06/2025 | NZ \$ 1,979 * |
| Roundtrip Economy | Viewed: 3 hours ago |

| | |
|-------------------------|---------------------|
| From Christchurch (CHC) | From |
| 27/05/2025 - 10/06/2025 | NZ \$ 1,997 * |
| Roundtrip Economy | Viewed: 2 hours ago |

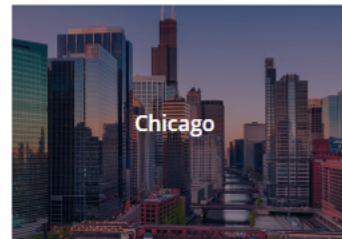
[See more](#)



Flights to Toronto (YYZ)

| | |
|-------------------------|---------------------|
| From Auckland (AKL) | From |
| 15/05/2025 - 29/05/2025 | NZ \$ 2,003 * |
| Roundtrip Economy | Viewed: 3 hours ago |

[See more](#)



Flights to Chicago (ORD)

| | |
|-------------------------|---------------------|
| From Auckland (AKL) | From |
| 08/05/2025 - 12/05/2025 | NZ \$ 2,449 * |
| Roundtrip Economy | Viewed: 3 hours ago |

| | |
|-------------------------|---------------------|
| From Christchurch (CHC) | From |
| 21/05/2025 - 25/05/2025 | NZ \$ 2,344 * |
| Roundtrip Economy | Viewed: 2 hours ago |

[See more](#)

*Prices have been available for round trips within the last 48 hours and may not be currently available. For Economy class, fares listed may be Basic Economy, which is our most restrictive fare option and subject to [additional restrictions](#). Additional [baggage charges](#) and fees for other optional service may apply. Other terms and conditions may apply.

Book the best deals from New Zealand to the United States

| Input departure airport | Input arrival airport | Input your budget | Select Cabin Class |
|-------------------------|-----------------------|-------------------|--------------------|
| Origin City | Destination City | Max budget | Economy |

| | | | |
|---|---|---|---|
| Auckland (AKL) to San Francisco (SFO) 11/06/2025 - 15/06/2025 from NZ \$1,839* Viewed: 2 hours ago Roundtrip Economy Book Now | Auckland (AKL) to Los Angeles (LAX) 22/05/2025 - 29/05/2025 from NZ \$1,789* Viewed: 2 hours ago Roundtrip Economy Book Now | Christchurch (CHC) to San Francisco (SFO) 04/06/2025 - 11/06/2025 from NZ \$1,838* Viewed: 2 hours ago Roundtrip Economy Book Now | Auckland (AKL) to New York/Newark (EWR) 27/05/2025 - 03/06/2025 from NZ \$2,249* Viewed: 2 hours ago Roundtrip Economy Book Now |
| Auckland (AKL) to Houston (IAH) 28/05/2025 - 01/06/2025 from NZ \$1,979* Viewed: 3 hours ago Roundtrip Economy Book Now | Auckland (AKL) to Chicago (ORD) 03/06/2025 - 17/06/2025 from NZ \$2,449* Viewed: 2 hours ago Roundtrip Economy Book Now | Auckland (AKL) to Seattle (SEA) 20/05/2025 - 27/05/2025 from NZ \$2,229* Viewed: 2 hours ago Roundtrip Economy Book Now | Auckland (AKL) to Denver (DEN) 11/06/2025 - 18/06/2025 from NZ \$2,229* Viewed: 3 hours ago Roundtrip Economy Book Now |

3. Delta

- 3.1 Delta is an American airline headquartered in Atlanta, Georgia. Delta offers flights up to 275 destinations in 50 countries, with up to 4,000 daily departures,²² including those between New Zealand, Australia and the US.
- 3.2 Delta is a founding member of the SkyTeam global alliance, which allows it to offer extensive network coverage and travel experiences through its partner airlines. The SkyTeam alliance includes 20 airlines operating more than 10,000 daily flights to over 1,000 destinations in 184 countries.²³
- 3.3 Delta has expanded its Trans-Pacific activities in recent years by launching additional services, including services to /from New Zealand. For example, in 2023 Delta launched a flight to New Zealand connecting Los Angeles to Auckland – which was initially planned as a seasonal service, but later extended to year-round operations.²⁴ Justin Erbacci, CEO of Los Angeles World Airports, described this new route as follows:

*'LAX continues to grow its global network of destinations that are connecting Angelenos to every corner of the globe, and Delta's addition of nonstop service from Los Angeles to New Zealand is in lockstep with the airline's commitment to expand and improve service to our region. Coupled with Delta's international additions to Sydney and Tahiti, this is another exciting result of the ongoing and strong collaboration between LAX and Delta Air Lines as we connect more people across the Pacific and beyond.'*²⁵

- 3.4 Delta also increased services from LAX to Sydney, to twice-daily in late 2023.²⁶ In December 2024, Delta also launched a seasonal route from Los Angeles to Brisbane between 4 December

²² See <https://www.delta.com/apac/en/about-delta/overview>.

²³ See <https://news.delta.com/tags/skyteam>. Delta also have Trans-Pacific alliances with China Eastern and Korean Air (see <https://www.delta.com/apac/en/airline-partners/overview>).

²⁴ See <https://news.delta.com/summer-europe-delta-fly-largest-ever-trans-atlantic-schedule>; and <https://onemileatatime.com/news/delta-auckland-flight/>.

²⁵ See <https://onemileatatime.com/news/delta-auckland-flight/>.

²⁶ See <https://news.delta.com/summer-europe-delta-fly-largest-ever-trans-atlantic-schedule>.

2024 and 28 March 2025.²⁷ Commenting on the launch, Joe Esposito, Delta's Senior Vice President of Network Planning remarked that:

*'This marks our most extensive schedule to the South Pacific to date, and as we build our presence in the region, we know our customers will enjoy the enhanced experience consistently provided by Delta.'*²⁸

- 3.5 Delta went on to emphasise that its *'LAX-to-Brisbane route is the latest in a series of investments the airline – already the leading global carrier at Los Angeles International Airport (LAX) – is making in the South Pacific region. In winter 2022, Delta introduced a second frequency from LAX to Sydney, and just recently enhanced those flights to daily... They also launched daily service from LAX to Auckland, New Zealand, in October 2023.'*²⁹

- 3.6 Delta further strengthened its presence on the Trans-Pacific with the recent announcement of a new non-stop service from Los Angeles to Melbourne, beginning December 2025.³⁰ Paul Baldoni, Senior Vice President of Network Planning at Delta has stated that:

*'Delta's new service to Melbourne reflects our commitment to connecting customers with the world's most exciting destinations... As the largest carrier at LAX, we're proud to provide a premium experience, whether customers are exploring Melbourne or connecting through our Los Angeles hub to destinations around the globe.'*³¹

- 3.7 This was supported by Lorie Argus, CEO of Melbourne Airport, who remarked that: *'Delta is one of the world's largest airlines and is consistently ranked among the best in North America. We are thrilled to have them add Melbourne to their network, given the opportunities it brings for Victorians and local businesses.'*³² This initiative will increase the annual capacity by 86,000 seats on the Melbourne-Los Angeles route, likely reducing Trans-Pacific airfares, benefiting travellers. Additionally, Delta will join United and Qantas in offering flights to the US from Sydney, Brisbane, and Melbourne.³³

- 3.8 In response to this announcement, Flight Centre corporate global chief operating officer Melissa Elf said *'based on their bookings, airfares between Australia and the US had come down 10 per cent in the past quarter, compared to the previous corresponding period... With the volume of seats available on flights between Australia and the US hovering around 90 per cent or lower in recent months, compared to pre-Covid volumes, announcements like this one from Delta is exactly what's needed to lift capacity and for prices to drop further.'*³⁴

- 3.9 This expansion means Delta's Trans-Pacific operations now include flights to Auckland (New Zealand), Papeete (Tahiti), Sydney, Brisbane, and Melbourne (Australia). Tom Hew, Delta's Country Manager for Australia and New Zealand, emphasised the airline's growth and market expansion in the region, noting, *'The opportunities for Delta in the region are indeed limited only by our imagination, drive, and determination.'*³⁵

- 3.10 Delta actively promotes its Trans-Pacific offering to New Zealand and Australian consumers, including via its website and other marketing channels, and use of press release for tactical campaigns and associated media coverage. See example promotional material associated with Delta's 2023 launch of flights to New Zealand set out below:³⁶

²⁷ See <https://news.delta.com/delta-brisbane-bound-brand-new-flight-lax>.

²⁸ See <https://news.delta.com/delta-brisbane-bound-brand-new-flight-lax>.

²⁹ See <https://news.delta.com/delta-brisbane-bound-brand-new-flight-lax>.

³⁰ See <https://news.delta.com/gday-melbourne-delta-introduces-nonstop-service-los-angeles>.

³¹ See <https://news.delta.com/gday-melbourne-delta-introduces-nonstop-service-los-angeles>.

³² See <https://www.aviacionline.com/delta-air-lines-expands-transpacific-market-with-nonstop-los-angeles-melbourne-route>.

³³ See 'Airfares to US falling as Delta adds thousands of extra seats' by Robyn Ironside in The Australian, 5 February 2025.

³⁴ See 'Airfares to US falling as Delta adds thousands of extra seats' by Robyn Ironside in The Australian, 5 February 2025.

³⁵ See <https://360.deltathailand.com/en/our-people/Tom-Hew-Interview>.

³⁶ See <https://www.nzherald.co.nz/business/companies/airlines/deltas-dawn-giant-us-airline-about-to-touchdown-in-nz-and-shake-up-the-market/7SSEVGT4BFDQKCKC5IPCAFSSU/>.



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PREMIUM

Delta's dawn: Giant US airline about to touchdown in NZ and shake-up the market



By **Grant Bradley**

Deputy Editor - Business · NZ Herald · 29 Oct, 2023 11:00 AM · 3 mins to read

4. Virgin Australia

- 4.1 Virgin Australia is a major Australian airline headquartered in Brisbane that commenced operations in Australia in 2000. Virgin Australia operates a comprehensive domestic network, serving major cities and regional destinations across Australia. The airline also offers a limited number of short-haul international flights.³⁷
- 4.2 Virgin Australia is not a member of any global airline alliance. However, it has strategic partnerships with several international airlines, including United, Air New Zealand, Air Canada, Hawaiian Airlines and Qatar, enhancing its network coverage and providing passengers with more travel options, including to / from New Zealand.³⁸ In September 2022, the ACCC granted authorisation to enable Virgin Australia to make and give effect to codeshare agreements with carriers operating long-haul international air passenger services to/from Australia (including with United).³⁹

³⁷ See <https://www.virginaustralia.com/au/en/about-us/>.

³⁸ See <https://www.virginaustralia.com/au/en/travel-info/flying-with-us/airline-partners/>.

³⁹ See ACCC Determination: Application for authorisation AA1000608 lodged by Virgin Australia Airlines Pty Ltd in respect of proposed codeshare pricing arrangements with participating international airlines (8 September 2022). Authorisation number: AA1000608. Available: <https://www.accc.gov.au/system/files/public-registers/documents/Final%20Determination%20-%2008.09.22%20-%20PR%20-%20AA1000608%20Virgin.pdf>.

- 4.3 Virgin Australia's partnership with United on the Trans-Pacific allows United customers access to Virgin Australia's domestic network and Virgin Australia access to United's long-haul network which has improved travel options between the US, New Zealand and Australia.
- 4.4 In 2024, Virgin Australia rekindled its partnership with Air New Zealand, with Virgin Australia Chief Strategy and Transformation Officer, Alistair Hartley, conveying:

*'The connection between Australia and New Zealand has always been deeper than just a stretch of ocean, and our new partnership with Air New Zealand celebrates that enduring bond. This codeshare agreement isn't just about flights – it's about creating seamless travel experiences that give Virgin Australia customers more ways to explore, connect, and adventure. We're committed to delivering unprecedented network coverage, loyalty rewards, and travel flexibility that make crossing borders as easy as crossing the street.'*⁴⁰

- 4.5 Virgin Australia actively promotes its Trans-Pacific partnerships. Examples are set out below:⁴¹



⁴⁰ See <https://www.virginaustralia.com/nz/en/newsroom/2024/12/virgin-australia-and-air-new-zealands-love-story-takes/>.

⁴¹ See <https://www.executivetraveller.com/news/virgin-australia-air-new-zealand-codeshare-partnership> and <https://www.virginaustralia.com/en-nz/flights-from-new-zealand>.

Top Deals on Flights from New Zealand

From

Select origin

To

Select destination

Budget

\$ Input max budget

From Queenstown (ZQN)
To
Brisbane (BNE)
23/09/2025 - 30/09/2025
From
\$770*
Last seen 1 hour ago
Return - Economy
Search flights

From Queenstown (ZQN)
To
Sydney (SYD)
28/11/2025 - 03/12/2025
From
\$717*
Last seen 3 hours ago
Return - Economy
Search flights

From Queenstown (ZQN)
To
Bali (DPS)
23/07/2025 - 04/08/2025
From
\$1,114*
Last seen 7 hours ago
Return - Economy
Search flights

From Queenstown (ZQN)
To
Gold Coast (OOL)
11/09/2025 - 25/09/2025
From
\$998*
Last seen 9 hours ago
Return - Economy
Search flights

From Queenstown (ZQN)
To
Adelaide (ADL)
08/10/2025 - 20/10/2025
From
\$966*
Last seen 6 hours ago
Return - Economy
Search flights

5. Hawaiian Airlines / Alaska Airlines

- 5.1 Hawaiian Airlines is Hawaii's largest and longest-serving airline, offering non-stop service to Hawaii from various destinations in North America, Asia, New Zealand, Australia and the South Pacific. The airline also provides inter-island flights connecting the major Hawaiian Islands.⁴² Hawaiian Airlines offers approximately 260 daily flights.⁴³ Hawaiian Airlines has recently been acquired by Alaska Airlines.⁴⁴
- 5.2 The resumption of services to New Zealand and Australia in 2022 was of key importance for Hawaiian Airlines. Reflecting on this milestone, Andrew Stanbury, regional director for Australia and New Zealand at Hawaiian Airlines stated that *'[t]he resumption of our New Zealand service, along with the restart of our Sydney service in December, completes the reopening of our Oceania market – an integral piece of our company's post-pandemic recovery.'*⁴⁵ Travellers in Australia and New Zealand also regained access to the carrier's extensive U.S. domestic network of 16 gateways, including destinations in Austin, Orlando, and Ontario, California, with the option to enjoy a stopover on the Hawaiian Islands in either direction.⁴⁶
- 5.3 Affirming the airline's commitment to New Zealand and the US in 2024, Russell Williss, country director for New Zealand at Hawaiian Airlines stated that *'[w]e love connecting people with aloha*

⁴² See <https://www.hawaiianairlines.com/destinations>.

⁴³ See <https://www.hawaiianairlines.com/about-us/corporate-responsibility/our-home#:~:text=Our%20distinct%20network%20of%20domestic,culture%20and%20way%20of%20life>.

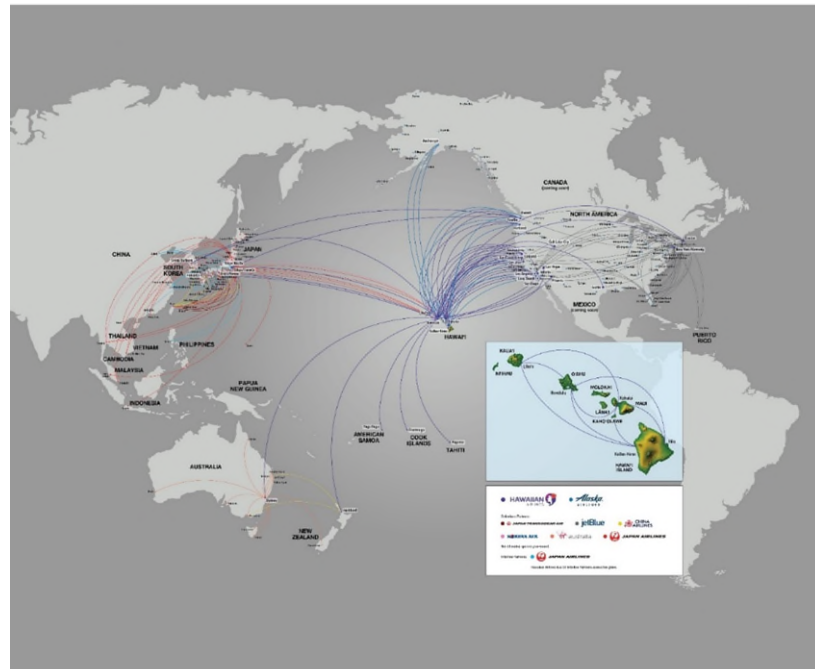
⁴⁴ See <https://news.alaskaair.com/company/alaska-airlines-completes-acquisition-of-hawaiian-airlines-expanding-benefits-and-choice-for-travelers/>

⁴⁵ See <https://newsroom.hawaiianairlines.com/releases/hawaiian-airlines-to-welcome-back-kiwis-with-resumption-of-nonstop-auckland-honolulu-service#:~:text=HONOLULU%20%E2%80%93%20Hawaiian%20Airlines%20today%20confirmed,to%20pandemic%20related%20travel%20restrictions>.

⁴⁶ See <https://newsroom.hawaiianairlines.com/releases/hawaiian-airlines-to-welcome-back-kiwis-with-resumption-of-nonstop-auckland-honolulu-service#:~:text=HONOLULU%20%E2%80%93%20Hawaiian%20Airlines%20today%20confirmed,to%20pandemic%20related%20travel%20restrictions>.

and take our decade-long commitment to connecting New Zealand with Hawai'i and the United States (and vice versa) very seriously.⁴⁷

- 5.4 Hawaiian Airlines route map, highlighting its Trans-Pacific offering is shown below:




- 5.5 Hawaiian Airlines actively promotes its Trans-Pacific offering to Australian and New Zealand consumers, including via its website and other marketing channels, and use of press release for tactical campaigns and associated media coverage. Examples are set out below:⁴⁸



⁴⁷ See <https://newsroom.hawaiianairlines.com/blog/we-love-connecting-people-with-aloha-hawaiian-airlines-welcomes-kiwis-back-with-auckland-seasonal-service>.

⁴⁸ See <https://news.alaskaair.com/destinations/fly-alaska-and-hawaiian-airlines-from-the-pacific-northwest-via-honolulu/> and https://www.hawaiianairlines.co.nz/beyond?HACMP=EMMP_HA-Fare_NZ_20230411&LID=1151911_&MID=1151911&Marketing_test=&RID=361388572&mi_ign=202304110100&xcheck_campaign=C000DG94F5&xcheck_segment=NZ.



Your connection to 15 destinations across North America

Start your U.S. journey with the 50th state's hometown carrier, the airline that specializes in vacations. With our easy connections from Honolulu (HNL) to Los Angeles (LAX), San Francisco (SFO), New York City (JFK) and more, we bring you to your destination with authentic Hawaiian hospitality at a great price.

Hawaii just might be your favorite layover of all time. Get a head start on clearing customs in Honolulu, where you can enjoy some time exploring the islands or continue onto a same-day connecting flight to the Continental U.S. Best of all, when you book your trip together with us, you'll enjoy two free 32 kg checked bags all the way to your ultimate destination.



Fly Alaska and Hawaiian Airlines from the Pacific Northwest via Honolulu

Now is the perfect time to book a dream vacation to Australia or New Zealand with special one-way fares from Seattle or Portland via Honolulu, available from November 19–21. Alaska Airlines and Hawaiian Airlines offer the most direct routes from the Pacific Northwest to Sydney and Auckland, with a layover in Honolulu.

By [Alaska Airlines](#) Nov 19, 2024 | 6 min read

Summary

- ✦ Travel with Alaska and Hawaiian Airlines from the Pacific Northwest, connecting through Honolulu on the quickest routes to Australia and New Zealand.
- ✦ Special fares starting at \$390 one-way from Seattle or Portland to Auckland (New Zealand) and Sydney (Australia) available through Nov. 21, 2024.
- ✦ Travel dates: Auckland through April 30, 2025, and Sydney between Feb. 1–Sept. 30, 2025, when booked on Alaska or Hawaiian Airlines websites.

If you're ready to experience a bucket-list vacation to Australia or New Zealand, now is the perfect time to book a flight to the warmth, beauty and excitement of a Southern Hemisphere adventure. Maybe even make some new Aussie and Kiwi friends along the way.

From now through Nov. 21, 2024, you can take advantage of special fares starting at \$390 one-way from Seattle or Portland via Honolulu for travel to Auckland, New Zealand through April 30, 2025, and for travel to Sydney, Australia between Feb. 1 through Sept. 30, 2025, when you book at [alaskaair.com](#) and [hawaiianairlines.com](#). Flights are subject to availability and fare restrictions apply. Visit [here](#) for more information on terms and conditions.

For our guests in the Pacific Northwest, Alaska Airlines and Hawaiian Airlines offer the most direct route from Seattle and Portland to Sydney and Auckland with a layover in Honolulu.

Annexure F – Market-share data for New Zealand-US routes (bi-directional) by PAX (premium and non-premium)

Market shares on New Zealand-US routes (bi-directional) by PAX – Premium

| | Summer 2020 | Winter 2020/2021 | Summer 2021 | Winter 2021/2022 | Summer 2022 | Winter 2022/2023 | Summer 2023 | Winter 2023/2024 | Summer 2024 | Winter 2024/2025 |
|----------------------------|-------------|------------------|-------------|------------------|-------------|------------------|-------------|------------------|-------------|------------------|
| Average Monthly Pax | 376 | 345 | 418 | 693 | 5,937 | 13,920 | 8,455 | 18,858 | 11,920 | 22,021 |
| Shares: | | | | | | | | | | |
| AA | 0.0% | 0.1% | 0.0% | 0.2% | 0.2% | 12.4% | 1.4% | 13.6% | 1.2% | 9.8% |
| QF | 0.0% | 0.0% | 0.1% | 0.9% | 5.1% | 6.0% | 5.4% | 7.4% | 5.3% | 8.4% |
| AA+QF | 0.0% | 0.1% | 0.1% | 1.1% | 5.2% | 18.4% | 6.8% | 21.0% | 6.5% | 18.1% |
| UA | 9.1% | 12.3% | 6.6% | 8.7% | 7.9% | 18.7% | 15.8% | 20.9% | 10.2% | 15.7% |
| NZ | 89.5% | 84.0% | 90.5% | 85.4% | 79.5% | 56.6% | 71.2% | 47.9% | 78.4% | 53.8% |
| UA+NZ | 98.5% | 96.3% | 97.1% | 94.2% | 87.4% | 75.3% | 87.1% | 68.8% | 88.6% | 69.5% |
| AC | 0.8% | 0.2% | 0.0% | 0.0% | 0.1% | 1.3% | 0.1% | 1.9% | 0.0% | 1.1% |
| DL | 0.0% | 0.1% | 0.0% | 0.0% | 0.3% | 0.2% | 0.4% | 3.9% | 2.9% | 8.1% |
| FJ | 0.0% | 0.0% | 0.0% | 1.8% | 2.1% | 1.7% | 1.4% | 1.5% | 1.2% | 1.6% |
| HA | 0.1% | 0.0% | 0.0% | 0.0% | 3.9% | 2.0% | 3.4% | 1.8% | 0.0% | 0.0% |
| LA | 0.0% | 0.0% | 0.0% | 1.3% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% |
| SQ | 0.0% | 1.7% | 1.2% | 1.1% | 0.1% | 0.0% | 0.0% | 0.1% | 0.0% | 0.0% |
| Other | 0.5% | 1.6% | 1.5% | 0.5% | 0.9% | 1.2% | 0.8% | 1.0% | 0.6% | 1.6% |
| HHI | 8,327 | 7,508 | 8,527 | 7,633 | 6,635 | 3,864 | 5,514 | 3,064 | 6,390 | 3,492 |
| HHI AA+QF Combined | 8,327 | 7,508 | 8,527 | 7,460 | 6,612 | 4,017 | 5,530 | 3,269 | 6,403 | 3,660 |

Source: MIDT.

Notes:

[1] Summer season is defined as April – October, Winter season is defined as November-March.

[2] Carriers with <1% share in each season are displayed under "Other" category.

[3] Shares for HHIs are recalculated after dropping carriers with <1% share.

[4] Premium tickets include "F", "C", and "W" cabin class.

Market shares on New Zealand-US routes (bi-directional) by PAX – Non-premium

| | Summer 2020 | Winter 2020/2021 | Summer 2021 | Winter 2021/2022 | Summer 2022 | Winter 2022/2023 | Summer 2023 | Winter 2023/2024 | Summer 2024 | Winter 2024/2025 |
|----------------------------|-------------|------------------|-------------|------------------|-------------|------------------|-------------|------------------|-------------|------------------|
| Average Monthly Pax | 2,221 | 1,956 | 2,039 | 4,059 | 26,731 | 60,515 | 50,999 | 77,412 | 45,534 | 78,443 |
| Shares: | | | | | | | | | | |
| AA | 0.1% | 0.1% | 0.1% | 0.0% | 0.6% | 13.3% | 1.5% | 11.5% | 2.1% | 11.1% |
| QF | 0.0% | 0.1% | 0.1% | 1.0% | 7.0% | 5.3% | 5.6% | 6.1% | 8.3% | 7.0% |
| AA+QF | 0.1% | 0.2% | 0.2% | 1.0% | 7.6% | 18.6% | 7.0% | 17.6% | 10.4% | 18.1% |
| UA | 5.8% | 14.4% | 14.8% | 19.6% | 9.4% | 12.4% | 11.9% | 14.2% | 9.8% | 12.2% |
| NZ | 92.2% | 74.3% | 76.5% | 71.1% | 63.5% | 51.6% | 65.5% | 41.2% | 67.2% | 45.2% |
| UA+NZ | 98.0% | 88.7% | 91.2% | 90.7% | 73.0% | 64.1% | 77.4% | 55.4% | 77.1% | 57.4% |
| AS | 0.0% | 0.0% | 0.0% | 0.0% | 0.1% | 0.0% | 0.0% | 0.3% | 0.1% | 5.6% |
| HA | 0.2% | 0.0% | 0.0% | 0.1% | 10.1% | 8.1% | 9.3% | 6.2% | 0.4% | 0.0% |
| AS+HA | 0.2% | 0.0% | 0.0% | 0.1% | 10.2% | 8.1% | 9.3% | 6.5% | 0.5% | 5.6% |
| AC | 0.8% | 0.0% | 0.0% | 0.0% | 0.2% | 1.3% | 0.1% | 1.5% | 0.3% | 1.5% |
| CX | 0.0% | 2.3% | 0.5% | 0.0% | 0.1% | 0.1% | 0.2% | 0.0% | 0.1% | 0.1% |
| DL | 0.0% | 0.0% | 0.0% | 0.0% | 0.3% | 0.2% | 0.4% | 14.7% | 6.5% | 12.9% |
| EK | 0.1% | 0.8% | 2.8% | 0.9% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% |
| FJ | 0.0% | 0.0% | 0.0% | 3.1% | 5.8% | 4.5% | 3.1% | 2.5% | 3.7% | 2.9% |
| LA | 0.0% | 0.0% | 0.0% | 2.2% | 0.3% | 0.0% | 0.3% | 0.1% | 0.1% | 0.1% |
| QR | 0.1% | 1.8% | 1.7% | 0.4% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% |
| SQ | 0.0% | 1.0% | 1.3% | 0.2% | 0.0% | 0.1% | 0.0% | 0.0% | 0.0% | 0.0% |
| TN | 0.4% | 0.0% | 0.0% | 0.0% | 2.2% | 2.5% | 1.7% | 0.9% | 0.9% | 0.8% |
| X9 | 0.0% | 1.5% | 1.1% | 0.9% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% |
| Other | 0.2% | 3.7% | 1.1% | 0.6% | 0.3% | 0.5% | 0.5% | 0.8% | 0.4% | 0.6% |
| HHI | 8,886 | 6,080 | 6,308 | 5,921 | 4,489 | 3,178 | 4,705 | 2,432 | 4,972 | 2,659 |
| HHI AA+QF Combined | 8,886 | 6,080 | 6,308 | 5,921 | 4,443 | 3,322 | 4,722 | 2,578 | 5,009 | 2,819 |

Source: MIDT.

Notes:

[1] Summer season is defined as April – October, Winter season is defined as November-March.

[2] Carriers with <1% share in each season are displayed under "Other" category.

[3] Shares for HHIs are recalculated after dropping carriers with <1% share.

[4] Non-premium tickets are Economy cabin.

Annexure G – Route share data

Auckland – LAX

The Auckland-LAX route is serviced by American, Air New Zealand, and more recently by Delta and United, demonstrating competitive new entry. Tables 1 and 2 below set out the Applicants' and other carriers' share of seats and HHIs on AKL-LAX for the previous 5 years. Tables 3 and 4 below set out the Applicants' and other carriers' total departures and departure shares on AKL-LAX for the previous 5 years.

Table 1 – Seat (capacity) on direct routes between Auckland-LAX (bi-directional)

| Carrier | Total Seats W20/21 | Total Seats S21 | Total Seats W21/22 | Total Seats S22 | Total Seats W22/23 | Total Seats S23 | Total Seats W23/24 | Total Seats S24 | Total Seats W24/25 | Total Seats S25 |
|---------|-----------------------|--------------------|-----------------------|--------------------|-----------------------|--------------------|-----------------------|--------------------|-----------------------|--------------------|
| AA | | | | | | | 36,480 | | 41,652 | |
| DL | | | | | | | 104,412 | 33,492 | 101,178 | 13,464 |
| NZ | 30,002 | 28,983 | 56,731 | 122,845 | 161,774 | 153,766 | 162,888 | 162,792 | 180,546 | 162,344 |
| UA | | | | | | | 42,662 | | | |

Table 2 – Seat (capacity) % share on direct routes between Auckland-LAX (bi-directional)

| Carrier | Seat Share W20/21 | Seat Share S21 | Seat Share W21/22 | Seat Share S22 | Seat Share W22/23 | Seat Share S23 | Seat Share W23/24 | Seat Share S24 | Seat Share W24/25 | Seat Share S25 |
|------------|----------------------|-------------------|----------------------|-------------------|----------------------|-------------------|----------------------|-------------------|----------------------|-------------------|
| AA | 0% | 0% | 0% | 0% | 0% | 0% | 11% | 0% | 13% | 0% |
| DL | 0% | 0% | 0% | 0% | 0% | 0% | 30% | 17% | 31% | 8% |
| NZ | 100% | 100% | 100% | 100% | 100% | 100% | 47% | 83% | 56% | 92% |
| UA | 0% | 0% | 0% | 0% | 0% | 0% | 12% | 0% | 0% | 0% |
| HHI | 10000 | 10000 | 10000 | 10000 | 10000 | 10000 | 3381 | 7170 | 4262 | 8586 |

Table 3 – Total departures on direct routes between Auckland-LAX (bi-directional)

| Carrier | Total Departures W20/21 | Total Departures S21 | Total Departures W21/22 | Total Departures S22 | Total Departures W22/23 | Total Departures S23 | Total Departures W23/24 | Total Departures S24 | Total Departures W24/25 | Total Departures S25 |
|---------|-------------------------|----------------------|-------------------------|----------------------|-------------------------|----------------------|-------------------------|----------------------|-------------------------|----------------------|
| AA | | | | | | | 128 | | 178 | |
| DL | | | | | | | 308 | 106 | 330 | 44 |
| NZ | 109 | 105 | 206 | 412 | 476 | 450 | 478 | 476 | 540 | 484 |
| UA | | | | | | | 166 | | | |

Table 4 – Departure % share on direct routes between Auckland-LAX (bi-directional)

| Carrier | Departure Share W20/21 | Departure Share S21 | Departure Share W21/22 | Departure Share S22 | Departure Share W22/23 | Departure Share S23 | Departure Share W23/24 | Departure Share S24 | Departure Share W24/25 | Departure Share S25 |
|------------|------------------------|---------------------|------------------------|---------------------|------------------------|---------------------|------------------------|---------------------|------------------------|---------------------|
| AA | 0% | 0% | 0% | 0% | 0% | 0% | 12% | 0% | 17% | 0% |
| DL | 0% | 0% | 0% | 0% | 0% | 0% | 29% | 18% | 31% | 8% |
| NZ | 100% | 100% | 100% | 100% | 100% | 100% | 44% | 82% | 52% | 92% |
| UA | 0% | 0% | 0% | 0% | 0% | 0% | 15% | 0% | 0% | 0% |
| HHI | 10000 | 10000 | 10000 | 10000 | 10000 | 10000 | 3149 | 7021 | 3935 | 8472 |

Source: OAG.

Notes:

[1] Winter season includes fourth quarter of the earlier year and first quarter of the later year. Summer season includes second and third quarter of the year.

[2] Analysis includes non-stop segments between U.S. (excluding territories and HI) and New Zealand.

[3] Carriers represent the operating carriers adjusted for mergers and acquisitions.

[4] A carrier is included in the table if they operated nonstop on at least one route between New Zealand and the United States.

[5] A carrier is considered operating nonstop on a route if it markets at least 52 non-directional flights (or about one round-trip flight per week) in either the summer or the winter season of the year, adjusted for mergers and acquisitions.

Auckland – JFK

Qantas and Air New Zealand are the only two carriers operating direct services between Auckland and JFK, with Air New Zealand commencing the route in 2022 and Qantas commencing the route in 2023.

Tables 5 and 6 below set out these two airlines' share of seats and HHIs on AKL-JFK for the previous 5 years. Tables 7 and 8 below set out these two airlines' total departures and departure shares on AKL-JFK for the previous 5 years.

Table 5 – Seat (capacity) on direct routes between Auckland-JFK (bi-directional)

| Carrier | Total Seats W20/21 | Total Seats S21 | Total Seats W21/22 | Total Seats S22 | Total Seats W22/23 | Total Seats S23 | Total Seats W23/24 | Total Seats S24 | Total Seats W24/25 | Total Seats S25 |
|---------|-----------------------|--------------------|-----------------------|--------------------|-----------------------|--------------------|-----------------------|--------------------|-----------------------|--------------------|
| NZ | | | | | 42,900 | 43,450 | 42,350 | 42,900 | 39,600 | 42,350 |
| QF | | | | | | 22,184 | 47,672 | 49,560 | 66,552 | 61,360 |

Table 6 – Seat (capacity) % share on direct routes between Auckland-JFK (bi-directional)

| Carrier | Seat Share W20/21 | Seat Share S21 | Seat Share W21/22 | Seat Share S22 | Seat Share W22/23 | Seat Share S23 | Seat Share W23/24 | Seat Share S24 | Seat Share W24/25 | Seat Share S25 |
|---------|----------------------|-------------------|----------------------|-------------------|----------------------|-------------------|----------------------|-------------------|----------------------|-------------------|
| NZ | 0% | 0% | 0% | 0% | 100% | 66% | 47% | 46% | 37% | 41% |
| QF | 0% | 0% | 0% | 0% | 0% | 34% | 53% | 54% | 63% | 59% |
| HHI | 0 | 0 | 0 | 0 | 10000 | 5525 | 5017 | 5026 | 5322 | 5168 |

Table 7 - Total departures on direct routes between Auckland-JFK (bi-directional)

| Carrier | Total Departures W20/21 | Total Departures S21 | Total Departures W21/22 | Total Departures S22 | Total Departures W22/23 | Total Departures S23 | Total Departures W23/24 | Total Departures S24 | Total Departures W24/25 | Total Departures S25 |
|---------|-------------------------------|----------------------------|-------------------------------|----------------------------|-------------------------------|----------------------------|-------------------------------|----------------------------|-------------------------------|----------------------------|
| NZ | | | | | 156 | 158 | 154 | 156 | 144 | 154 |
| QF | | | | | | 94 | 202 | 210 | 282 | 260 |

Table 8 – Departure % share on direct routes between Auckland-JFK (bi-directional)

| Carrier | Departure Share W20/21 | Departure Share S21 | Departure Share W21/22 | Departure Share S22 | Departure Share W22/23 | Departure Share S23 | Departure Share W23/24 | Departure Share S24 | Departure Share W24/25 | Departure Share S25 |
|---------|------------------------|---------------------|------------------------|---------------------|------------------------|---------------------|------------------------|---------------------|------------------------|---------------------|
| NZ | 0% | 0% | 0% | 0% | 100% | 63% | 43% | 43% | 34% | 37% |
| QF | 0% | 0% | 0% | 0% | 0% | 37% | 57% | 57% | 66% | 63% |
| | 0 | 0 | 0 | 0 | 10000 | 5322 | 5091 | 5109 | 5525 | 5328 |

Source: OAG.

Notes:

[1] Winter season includes fourth quarter of the earlier year and first quarter of the later year. Summer season includes second and third quarter of the year.

[2] Analysis includes non-stop segments between U.S. (excluding territories and HI) and New Zealand.

[3] Carriers represent the operating carriers adjusted for mergers and acquisitions.

[4] A carrier is included in the table if they operated nonstop on at least one route between New Zealand and the United States.

[5] A carrier is considered operating nonstop on a route if it markets at least 52 non-directional flights (or about one round-trip flight per week) in either the summer or the winter season of the year, adjusted for mergers and acquisitions.

Auckland – DFW

American Airlines is the only carrier on this route and commenced services in 2022. Data for this route for the last 5 years is shown in tables 9 - 12 below.

Table 9 – Seat (capacity) on direct routes between Auckland-DFW (bi-directional)

| Carrier | Total Seats W20/21 | Total Seats S21 | Total Seats W21/22 | Total Seats S22 | Total Seats W22/23 | Total Seats S23 | Total Seats W23/24 | Total Seats S24 | Total Seats W24/25 | Total Seats S25 |
|---------|--------------------|-----------------|--------------------|-----------------|--------------------|-----------------|--------------------|-----------------|--------------------|-----------------|
| AA | | | | | 81,510 | | 86,640 | | 76,950 | |

Table 10 – Seat (capacity) % on direct routes between Auckland-DFW (bi-directional)

| Carrier | Seat Share W20/21 | Seat Share S21 | Seat Share W21/22 | Seat Share S22 | Seat Share W22/23 | Seat Share S23 | Seat Share W23/24 | Seat Share S24 | Seat Share W24/25 | Seat Share S25 |
|---------|----------------------|-------------------|----------------------|-------------------|----------------------|-------------------|----------------------|-------------------|----------------------|-------------------|
| AA | 0% | 0% | 0% | 0% | 100% | 0% | 100% | 0% | 100% | 0% |
| HHI | 0 | 0 | 0 | 0 | 10000 | 0 | 10000 | 0 | 10000 | 0 |

Table 11 – Total departures on direct routes between Auckland-DFW (bi-directional)

| Carrier | Total Departures W20/21 | Total Departures S21 | Total Departures W21/22 | Total Departures S22 | Total Departures W22/23 | Total Departures S23 | Total Departures W23/24 | Total Departures S24 | Total Departures W24/25 | Total Departures S25 |
|---------|-------------------------------|----------------------------|-------------------------------|----------------------------|-------------------------------|----------------------------|-------------------------------|----------------------------|-------------------------------|----------------------------|
| AA | | | | | 286 | | 304 | | 270 | |

Table 12 – Departure % share on direct routes between Auckland-DFW (bi-directional)

| Carrier | Departure Share W20/21 | Departure Share S21 | Departure Share W21/22 | Departure Share S22 | Departure Share W22/23 | Departure Share S23 | Departure Share W23/24 | Departure Share S24 | Departure Share W24/25 | Departure Share S25 |
|---------|------------------------------|---------------------------|------------------------------|---------------------------|------------------------------|---------------------------|------------------------------|---------------------------|------------------------------|---------------------------|
| AA | 0% | 0% | 0% | 0% | 100% | 0% | 100% | 0% | 100% | 0% |
| HHI | 0 | 0 | 0 | 0 | 10000 | 0 | 10000 | 0 | 10000 | 0 |

Source: OAG.

Notes:

[1] Winter season includes fourth quarter of the earlier year and first quarter of the later year. Summer season includes second and third quarter of the year.

[2] Analysis includes non-stop segments between U.S. (excluding territories and HI) and New Zealand.

[3] Carriers represent the operating carriers adjusted for mergers and acquisitions.

[4] A carrier is included in the table if they operated nonstop on at least one route between New Zealand and the United States.

[5] A carrier is considered operating nonstop on a route if it markets at least 52 non-directional flights (or about one round-trip flight per week) in either the summer or the winter season of the year, adjusted for mergers and acquisitions.

Annexure H – Operators of indirect NZ-US routes

1. Fiji Airways

- 1.1 Fiji Airways is the national airline of Fiji, offering flights to over 26 destinations across the Pacific, Australia, New Zealand, Asia, and North America.⁴⁹ Fiji Airways also operates Fiji Link, a subsidiary that extends its network to domestic destinations within Fiji and nearby Pacific Island nations such as Tonga, Samoa, Tuvalu and Vanuatu.⁵⁰
- 1.2 Fiji Airways became a full member of the oneworld alliance on 1 April 2025.⁵¹
- 1.3 Fiji Airways' Trans-Pacific services include services from Fiji to Sydney, Melbourne, and Brisbane (Australia); Los Angeles, San Francisco and Honolulu (US); and Auckland and Christchurch (New Zealand).⁵² This network provides a host of indirect connections for New Zealand and Australian consumers to travel to and from the US. This was expanded recently, in 2024, by the introduction of the airline's first non-stop flight between Nadi and DFW, increasing connectivity on the Trans-Pacific and providing more indirect options for New Zealand and Australian consumers to travel to the US.
- 1.4 Promoting the new route, Fiji Airways Chief Executive Officer and Managing Director, Andre Viljoen said:
- 'Introducing a direct service between Fiji and Dallas is a really exciting milestone for Fiji Airways, as we continue to increase Fiji's connectivity with the United States and beyond offering our guests more travel options... The new Fiji-Dallas service is set to bring more than 1,000 passengers a week into Fiji alone, helping to bolster the nation's tourism industry. The overnight flight will also offer our customers increased connections to North America from the South Pacific and [onward connections to Australia and New Zealand].'*⁵³
- 1.5 Fijian Deputy Prime Minister and Minister for Finance, Strategic Planning, National Development and Statistics, Honourable Professor Biman Prasad, expressed his enthusiasm for the announcement, stating *'Fiji Airways' new direct route to Dallas is an exciting development for Fiji and will help pave the way for expanded opportunities in tourism and trade between our two nations. Dallas has immense potential as a new source market for Fiji's tourism industry, with DFW International Airport currently ranked the third-busiest airport in the world and the state of Texas home to some of the fastest-growing counties in the United States.'*⁵⁴
- 1.6 The DFW-NAN route strengthens Fiji Airways' expanding presence in North America, joining existing services from Los Angeles, San Francisco, Honolulu, and Vancouver to be the fifth direct route from Fiji to the North American region. This new route also marks Fiji Airways' 26th international direct route and with the airline's growing network, will connect with the airline's 27th direct service to Cairns, Australia which is reported to be launching from 10th April 2025.⁵⁵
- 1.7 Fiji Airways' network, including on the Trans-Pacific, is shown below in its published route map (as at February 2025):

⁴⁹ See <https://www.fijiairways.com/en-us/>.

⁵⁰ See <https://www.oneworld.com/members/fiji-airways>.

⁵¹ See <https://www.oneworld.com/news/2025-03-31-paradise-found-oneworld-welcomes-fiji-airways-to-global-alliance>

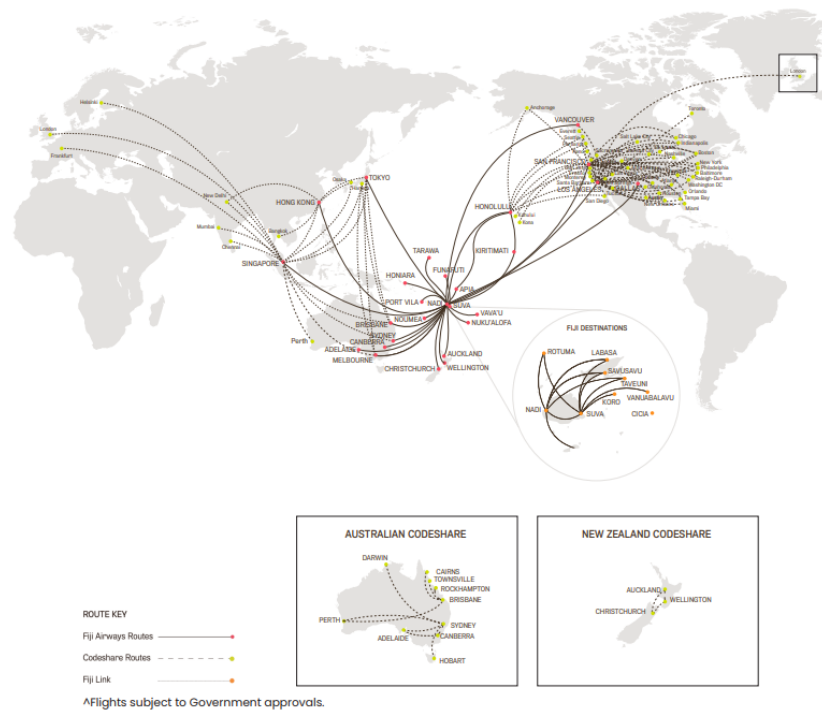
⁵² See <https://simpleflying.com/new-routes-fiji-airways/>.

⁵³ See <https://www.fijiairways.com/en-eu/media-centre/bula-dallas-fiji-airways-announces-direct-service-between-fiji-and-dallas>, and <https://www.fijiairways.com/en-eu/fiji-airways-launches-inaugural-flight-from-nadi-to-dallas-fort-worth>.

⁵⁴ See <https://www.fijiairways.com/en-eu/media-centre/bula-dallas-fiji-airways-announces-direct-service-between-fiji-and-dallas>.

⁵⁵ See <https://www.fijiairways.com/en-eu/fiji-airways-launches-inaugural-flight-from-nadi-to-dallas-fort-worth>.

FIJI AIRWAYS DESTINATIONS



- 1.8 Fiji Airways actively promotes its Trans-Pacific offering to Australian consumers, including via its website and other marketing channels, and use of press release for tactical campaigns and associated media coverage. Examples are set out below:⁵⁶

⁵⁶ See <https://www.fijiairways.com/en-nz/flights-from-auckland-to-united-states>; see <https://www.fijiairways.com/en-fj/flights-from-new-zealand>; see <https://www.thetravel.com/fiji-airways-sale/>; see <https://www.breakingtravelnews.com/news/article/fiji-airways-unveils-massive-sale-to-fiji-australia-new-zealand-and-beyond/> and see <https://www.travelandtourworld.com/news/article/fiji-united-states-japan-australia-new-zealand-canada-united-kingdom-fiji-airways-and-one-world-alliance-drive-transpacific-tourism-through-enhanced-airline-connectivity/>.

Our Most Searched Flights on Fiji Airways from Auckland to United States

FROM

TO



Auckland, New Zealand (AKL)



Select destination

**Auckland (AKL) to
Los Angeles (LAX)**

22/05/25 - 09/06/25

From

NZD1,296*

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**Auckland (AKL) to
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08/04/25 - 16/04/25

From

NZD1,296*

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**Auckland (AKL) to
Los Angeles (LAX)**

19/05/25 - 30/05/25

From

NZD1,296*

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**Auckland (AKL) to
Los Angeles (LAX)**

28/04/25 - 14/05/25

From

NZD1,296*

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**Auckland (AKL) to
Dallas Fort Worth (DFW)**

20/05/25 - 29/05/25

From

NZD1,674*

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**Auckland (AKL) to
Dallas Fort Worth (DFW)**

10/04/25 - 17/04/25

From

NZD1,773*

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01/07/25 - 22/07/25

From

NZD1,985*

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Dallas Fort Worth (DFW)**

15/05/25 - 29/05/25

From

NZD2,002*

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**Auckland (AKL) to
San Francisco (SFO)**

20/05/25 - 12/08/25

From

NZD1,513*

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**Auckland (AKL) to
San Francisco (SFO)**

22/06/25 - 26/07/25

From

NZD1,760*

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**Auckland (AKL) to
San Francisco (SFO)**

01/07/25 - 10/07/25

From

NZD1,846*

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Round trip / Economy

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**Auckland (AKL) to
San Francisco (SFO)**

08/04/25 - 17/04/25

From

NZD1,930*

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Round trip / Economy

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**Auckland (AKL) to
Honolulu (HNL)**

25/05/25 - 31/05/25

From

NZD1,247*

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**Auckland (AKL) to
Honolulu (HNL)**

20/04/25 - 26/04/25

From

NZD1,531*

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**Auckland (AKL) to
Honolulu (HNL)**

10/04/25 - 24/04/25

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NZD2,448*

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**Auckland (AKL) to
Honolulu (HNL)**

03/07/25 - 12/07/25

From

NZD2,903*

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| From Los Angeles (LAX) To Christchurch (CHC) | \$424*USD | \$594*USD | \$774*USD |
| From Los Angeles (LAX) To Wellington (WLG) | \$424*USD | \$594*USD | \$774*USD |
| From Dallas Fort Worth (DFW) To Auckland (AKL) | \$424*USD | \$594*USD | \$774*USD |
| From Dallas Fort Worth (DFW) To Christchurch (CHC) | \$424*USD | \$594*USD | \$774*USD |
| From Dallas Fort Worth (DFW) To Wellington (WLG) | \$424*USD | \$594*USD | \$774*USD |
| From San Francisco (SFO) To Auckland (AKL) | \$424*USD | \$594*USD | \$774*USD |
| From San Francisco (SFO) To Christchurch (CHC) | \$424*USD | \$594*USD | \$774*USD |
| From San Francisco (SFO) To Wellington (WLG) | \$424*USD | \$594*USD | \$774*USD |

Fly out New Zealand with These Popular Flight Deals

FROM

TO

BUDGET

Select origin

Select destination

FJD Set max budget

Auckland (AKL) to Nadi (NAN)
24/04/25 - 02/05/25

From **FJD942***
Viewed 6 hours ago
Round trip / Economy

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Christchurch (CHC) to Nadi (NAN)
01/05/25 - 08/05/25

From **FJD1,156***
Viewed 1 hour ago
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Wellington (WLG) to Nadi (NAN)
04/05/25 - 21/05/25

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Auckland (AKL) to Suva (SUV)
15/04/25 - 28/04/25

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Auckland (AKL) to Labasa (LBS)
19/04/25 - 26/04/25

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Wellington (WLG) to Suva (SUV)
18/04/25 - 22/04/25

From **FJD1,360***
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Auckland (AKL) to San Francisco (SFO)
29/04/25 - 27/05/25

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Auckland (AKL) to Savusavu (SVU)
13/04/25 - 15/04/25

From **FJD1,725***
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Trending Plane Tickets from New Zealand on Fiji Airways

| From | To | Dates | Fare Type | Price |
|--------------------|--------------|---------------------------------------|----------------------|--|
| Auckland (AKL) | Nadi (NAN) | Departs 05/06/25- Return: 18/06/25 | Round trip / Economy | From FJD882* Viewed 1 day ago |
| Christchurch (CHC) | Nadi (NAN) | Departs 27/11/25- Return: 11/12/25 | Round trip / Economy | From FJD898* Viewed 5 hours ago |
| Wellington (WLG) | Nadi (NAN) | Departs 09/07/25- Return: 20/07/25 | Round trip / Economy | From FJD926* Viewed 6 hours ago |
| Auckland (AKL) | Suva (SUV) | Departs 17/07/25- Return: 15/08/25 | Round trip / Economy | From FJD1,218* Viewed 9 hours ago |
| Auckland (AKL) | Labasa (LBS) | Departs 23/05/25- Return: 09/06/25 | Round trip / Economy | From FJD1,392* Viewed 8 hours ago |
| Wellington (WLG) | Suva (SUV) | Departs 18/06/25- Return: 01/10/25 | Round trip / Economy | From FJD1,687* Viewed 1 day ago |
| Christchurch (CHC) | Suva (SUV) | Departs 16/08/25- Return: 28/08/25 | Round trip / Economy | From FJD1,337* Viewed 23 hours ago |

Fiji Airways' Flight Deals Mean Hundreds In Savings For U.S. Travelers Heading To Some Destinations



Fiji Airways plane over LAX

Fiji Airways' limited-time flight sales can help travelers budget for the trip of a lifetime to Fiji, New Zealand, or Australia for around \$900 round trip per flight. Fiji Airways is the primary airline connecting U.S. travelers to destinations in Fiji, while other airlines appear to have fewer offerings that are also more expensive.

Fiji Airways Unveils Massive Sale to Fiji, Australia, New Zealand and Beyond!

© 18 January 2025

Fiji Airways, Fiji's national airline, has launched incredible flight deals for American travelers looking to escape winter for a relaxing getaway or thrilling adventure.



Until February 7, 2025, Fiji Airways is offering significant savings on round-trip airfares to some of the world's most sought-after destinations, including the pristine beaches of Fiji, the Great Barrier Reef in Cairns, the iconic landmarks of Sydney, the vibrant streets of Auckland and beyond.

Available on select travel dates, travelers can fly from Los Angeles, San Francisco, Honolulu or Dallas Fort Worth to:

Fiji from just USD \$748 on a roundtrip Value fare

Australia from USD \$848 on a roundtrip Value fare

New Zealand from USD \$848 on a roundtrip Value fare

Tonga & Western Samoa from USD \$1,298 on a roundtrip Value fare

All economy value fares include one checked bag of up to 30kg, a carry-on bag of up to 7kg, complimentary meals, beverages, and in-flight entertainment, with additional fare options available for those seeking added perks and convenience.

The sale ends February 7, 2025 and is valid for select travel dates across 2025, with limited seats available. Terms and conditions apply.

Fiji, United States, Japan, Australia, New Zealand, Canada, United Kingdom – Fiji Airways and one world Alliance Drive Transpacific Tourism Through Enhanced Airline Connectivity

Monday, March 31, 2025



On **March 31, 2025**, **Fiji Airways**, the national carrier of Fiji, officially became a full member of the **oneworld® global airline alliance**, unlocking a world of benefits for travelers while elevating the international visibility of **Fiji and the South Pacific** as dream tourism destinations. Beginning **April 1, 2025**, passengers will enjoy seamless global access across a vast alliance network and experience Fijian hospitality at a global scale.

With its hub at **Nadi International Airport**, Fiji Airways now joins an elite group of world-class airlines offering benefits such as **priority check-in and boarding, mileage redemption, tier point accumulation**, and access to **nearly 700 airport lounges**, including the new oneworld lounges at **Amsterdam Schiphol** and **Seoul Incheon** airports. The move aligns with the tourism goals of Pacific Island nations seeking to grow inbound travel through improved connectivity.

2. Air Canada

2.1 Air Canada is the Canadian national carrier airline based in Montreal. It provides scheduled and charter air transport for passengers to over 180 destinations with more than 1,000 daily flights. The airline's network coverage spans six continents, with major hubs in Toronto, Montreal, and Vancouver,⁵⁷ and includes services between New Zealand and Canada.

2.2 Air Canada is a founding member of the Star Alliance. Air Canada also partners with other airlines through codeshare agreements, further extending its connectivity and offering passengers a wide range of travel options.⁵⁸ Relevantly, Air Canada participates in joint venture partnerships with United for most flights between Canada and the US, and Air New Zealand with respect to flights to / from New Zealand (including those to Australia with onwards connections to Canada).

⁵⁷ See <https://www.aircanada.com/home/us/en/aco/flights>.


⁵⁸ See https://www.aircanada.com/us/en/aco/home/book/routes-and-partners/star-alliance-and-other-airline-partners.html#.

- 2.3 During Air Canada's 2024 Annual General Meeting, Michael Rousseau, President and Chief Executive, the airline's international performance and expansion:

*'Throughout 2023, we announced new destinations, restored routes, added frequencies, and made other strategic adjustments mainly aimed at strengthening our key hubs and ensuring our resiliency. Internationally, we relaunched, extended, or increased frequencies on 34 routes across the Atlantic and Pacific. This is not only exciting, but profitable. We saw a 50% increase in our 2023 passenger revenues from international services over 2022, and these services accounted for about 65% of the growth in total passenger revenues. This highlights the strength of our network and our position as Canada's leading global airline.'*⁵⁹

*Within North America, we grew capacity on nearly 70% of all routes served.'*⁵⁹

- 2.4 Air Canada continues to offer flights to major Australian and New Zealand cities, including Sydney and Brisbane as well as Auckland,⁶⁰ with its Vancouver hub serving as a key gateway for passengers from Australia and New Zealand connecting to North America.
- 2.5 Air Canada actively promotes its Trans-Pacific offering to New Zealand and Australian consumers, including via its website and other marketing channels, and use of press release for tactical campaigns and associated media coverage. Examples are set out below:⁶¹

Australia & New Zealand

Australia
[View flight schedule](#)


| From | To |
|-----------------|---|
| Vancouver (YVR) | <ul style="list-style-type: none">BrisbaneSydney |

New Zealand
[View flight schedule](#)

| From | To |
|-----------------|--|
| Vancouver (YVR) | <ul style="list-style-type: none">Auckland |

Flights between New Zealand and Canada - our lowest fares in points

 Input origin

 Input destination

pts Input max budget

Economy

| From | To | Fare Type | Departure | Price |
|----------------|-----------------|----------------------|-----------------------------|---|
| Auckland (AKL) | Vancouver (YVR) | Round-trip / Economy | Feb 10, 2026 - Feb 24, 2026 | 143,900 pts + CAD 218 <small>Viewed: 4 hours ago</small> |

3. Air Tahiti Nui

- 3.1 Air Tahiti Nui is the international airline of French Polynesia. The airline offers direct flights between Tahiti and major cities such as Paris, Los Angeles, Seattle, Auckland, and Tokyo.⁶²

⁵⁹ See <https://media.aircanada.com/Remarks-for-Michael-Rousseau,-President-and-Chief-Executive,-Air-Canada,-2024-Annual-General-Meeting-March-28,-2024>.

⁶⁰ See <https://vacations.aircanada.com/en/tour-details/SYDNZE/magical-australia-and-new-zealand-express>.

⁶¹ See <https://www.aircanada.com/en-ca/flights-from-new-zealand-to-canada>.

⁶² See <https://us.airtahitinui.com/spirit-air-tahiti-nui>.

- 3.2 While Air Tahiti Nui is not a member of any major airline alliance, it has established codeshare agreements with several airlines, including American, Air France, Japan Airlines, and Qantas.⁶³
- 3.3 Air Tahiti Nui offers indirect options on the Trans-Pacific for New Zealand and Australian consumers, through its direct flights from Papeete to Los Angeles and Seattle. These flights provide convenient connections to numerous destinations across North America through partnerships with American and Alaska Airlines.⁶⁴ Air Tahiti Nui connects Papeete to New Zealand, with direct flights to Auckland, and onwards to Australia via Auckland, with flights extending to cities such as Sydney, Melbourne, Brisbane, and Perth through its partner airlines.⁶⁵ Through regular flights from Papeete to Auckland, Air Tahiti Nui provides options to New Zealand, supplemented by codeshare and interline partnerships with Air New Zealand, Qantas, and Aircalin which allow passengers to extend their journeys to other destinations within New Zealand, such as Queenstown and Christchurch.⁶⁶

⁶³ See <https://us.airtahitinui.com/spirit-air-tahiti-nui>.

⁶⁴ See <https://us.airtahitinui.com/flights-united-states>.

⁶⁵ See <https://us.airtahitinui.com/flights-australia>.

⁶⁶ See <https://www.airtahitinui.com/en/flights-new-zealand>.

Annexure I – Slot holding data

Table 1 below shows the percentage of all Auckland departures broken down by carrier for January 2025. Tables 2 and 3 below show the percentage of all allocated international slots at Auckland Airport broken down by carrier for the Winter 2024 and Summer 2025 IATA seasons. The Applicants have provided slot shares below for Northern Winter 2024 and Northern Summer 25, as these are most representative of post-pandemic services, including services launched by Delta and the Applicants. The Applicants do not consider it instructive to provide slot shares for 2020-2023, including because of the effects of the Covid-19 Pandemic on services between 2020 and 2022.

Table 1: Auckland – Carrier Share by Departure – As at January 2025

| Carrier | % of total AKL Departure |
|---------|--------------------------|
| NZ | 67.1% |
| JQ | 10.9% |
| QF | 6.5% |
| 3C | 2.7% |
| SQ | 1.5% |
| FJ | 1.1% |
| AA | 1.0% |
| CZ | 1.0% |
| LA | 0.9% |
| MU | 0.8% |
| CI | 0.7% |
| MH | 0.6% |
| CA | 0.5% |
| DL | 0.5% |
| EK | 0.5% |
| KE | 0.5% |
| QR | 0.5% |
| UA | 0.5% |
| CX | 0.5% |
| HU | 0.4% |
| AC | 0.3% |
| HA | 0.2% |
| TN | 0.2% |
| IE | 0.1% |
| SB | 0.1% |
| SU | 0.1% |

Table 2: Auckland – Carrier Share by Allocated International Slots W24⁶⁷

| AKL Slots Held | |
|----------------|---------|
| Operator | W24 |
| NZ | 42.63% |
| QF | 17.19% |
| JQ | 8.18% |
| SQ | 4.08% |
| FJ | 2.69% |
| LA | 2.40% |
| MU | 2.20% |
| AA | 2.07% |
| CZ | 1.96% |
| MH | 1.59% |
| QR | 1.40% |
| EK | 1.40% |
| CI | 1.40% |
| DL | 1.40% |
| UA | 1.38% |
| KE | 1.36% |
| CX | 1.35% |
| CA | 1.24% |
| HU | 1.12% |
| AC | 0.65% |
| IE | 0.54% |
| HA | 0.53% |
| TN | 0.50% |
| SB | 0.25% |
| 3C | 0.21% |
| 3U | 0.20% |
| TNZ | 0.01% |
| AWK | 0.01% |
| 6D | 0.01% |
| 5Y | 0.01% |
| ON | 0.01% |
| HJ | 0.01% |
| Grand Total | 100.00% |

Table 3: Auckland – Carrier Share by Allocated International Slots S25

| AKL Slots Held | |
|----------------|--------|
| Operator | S25 |
| NZ | 48.96% |
| QF | 18.15% |

⁶⁷ Information supplied by Airport Coordination Limited International, slot manager for Auckland Airport.

| | |
|-------------|---------|
| JQ | 9.20% |
| FJ | 3.08% |
| MU | 2.42% |
| LA | 2.32% |
| MH | 1.76% |
| SQ | 1.54% |
| EK | 1.54% |
| QR | 1.54% |
| CX | 1.54% |
| CZ | 1.50% |
| HU | 1.32% |
| CI | 1.00% |
| KE | 0.78% |
| CA | 0.70% |
| UA | 0.67% |
| IE | 0.66% |
| TN | 0.53% |
| SB | 0.40% |
| DL | 0.22% |
| HA | 0.10% |
| 3U | 0.04% |
| 3C | 0.03% |
| ZT | 0.01% |
| FI | 0.01% |
| AA | 0.01% |
| Grand Total | 100.00% |

Annexure J – Historical average fare data

United States - New Zealand (Bi-directional) - All fares quoted in USD, RT⁶⁸

Total

| Dominant Marketing Airline | Country of Sale | 2023 | 2024 | CY24vCY23 |
|----------------------------|-----------------|------|------|-----------|
| AA | All | 2242 | 2117 | -6% |
| AA | NZ | 1513 | 1247 | -18% |
| AA | US | 2423 | 2335 | -4% |
| QF | All | 2539 | 2535 | 0% |
| QF | NZ | 1182 | 1211 | 2% |
| QF | US | 3245 | 3453 | 6% |
| DL | All | 1971 | 1898 | -4% |
| DL | NZ | 1112 | 1362 | 22% |
| DL | US | 2053 | 2020 | -2% |
| FJ | All | 1373 | 1302 | -5% |
| FJ | NZ | 909 | 729 | -20% |
| FJ | US | 1517 | 1548 | 2% |
| HA | All | 1094 | 987 | -10% |
| HA | NZ | 1103 | 872 | -21% |
| HA | US | 1130 | 1121 | -1% |
| NZ | All | 2503 | 2472 | -1% |
| NZ | NZ | 2437 | 2269 | -7% |
| NZ | US | 2765 | 2915 | 5% |
| UA | All | 2803 | 2575 | -8% |
| UA | NZ | 1645 | 1505 | -9% |
| UA | US | 3212 | 2860 | -11% |

Non-premium (discounted economy)

| Dominant Marketing Airline | Country of Sale | 2023 | 2024 | CY24vCY23 |
|----------------------------|-----------------|------|------|-----------|
| AA | All | 1368 | 1133 | -17% |
| AA | NZ | 1174 | 965 | -18% |
| AA | US | 1437 | 1183 | -18% |
| QF | All | 1305 | 1145 | -12% |
| QF | NZ | 895 | 822 | -8% |
| QF | US | 1570 | 1423 | -9% |
| DL | All | 1491 | 1228 | -18% |
| DL | NZ | 1079 | 1292 | 20% |

⁶⁸ RT – Return Trip.

| Dominant Marketing Airline | Country of Sale | 2023 | 2024 | CY24vCY23 |
|----------------------------|-----------------|------|------|-----------|
| DL | US | 1525 | 1223 | -20% |
| FJ | All | | | - |
| FJ | NZ | | | - |
| FJ | US | | | - |
| HA | All | 931 | 809 | -13% |
| HA | NZ | 950 | 781 | -18% |
| HA | US | 942 | 862 | -8% |
| NZ | All | 1280 | 1236 | -3% |
| NZ | NZ | 1276 | 1201 | -6% |
| NZ | US | 1370 | 1364 | 0% |
| UA | All | 1422 | 1289 | -9% |
| UA | NZ | 1162 | 1057 | -9% |
| UA | US | 1557 | 1370 | -12% |

Premium

| Dominant Marketing Airline | Country of Sale | 2023 | 2024 | CY24vCY23 |
|----------------------------|-----------------|------|------|-----------|
| AA | All | 6302 | 6803 | 8% |
| AA | NZ | 4622 | 4640 | 0% |
| AA | US | 6564 | 7094 | 8% |
| QF | All | 6867 | 6872 | 0% |
| QF | NZ | 3200 | 3578 | 12% |
| QF | US | 7995 | 8047 | 1% |
| DL | All | 6034 | 5178 | -14% |
| DL | NZ | 6497 | 4797 | -26% |
| DL | US | 5982 | 5207 | -13% |
| FJ | All | 1373 | 1302 | -5% |
| FJ | NZ | 909 | 729 | -20% |
| FJ | US | 1517 | 1548 | 2% |
| HA | All | 4300 | 4015 | -7% |
| HA | NZ | 4575 | 4545 | -1% |
| HA | US | 4088 | 3918 | -4% |
| NZ | All | 4930 | 5134 | 4% |
| NZ | NZ | 4604 | 4428 | -4% |
| NZ | US | 5533 | 6373 | 15% |
| UA | All | 6524 | 6250 | -4% |
| UA | NZ | 5394 | 4923 | -9% |
| UA | US | 6703 | 6480 | -3% |

Los Angeles – Auckland (Bi-directional) - All fares quoted in USD, RT

Total

| Dominant Marketing Airline | POS | 2023 | 2024 | CY24vCY23 |
|----------------------------|-----|------|------|-----------|
| AA | All | 1761 | 1560 | -11% |
| AA | NZ | 979 | 824 | -16% |
| AA | US | 2132 | 1847 | -13% |
| QF | All | 1799 | 1713 | -5% |
| QF | NZ | 1004 | 724 | -28% |
| QF | US | 2182 | 2157 | -1% |
| DL | All | 1424 | 1459 | 2% |
| DL | NZ | 1002 | 1041 | 4% |
| DL | US | 1451 | 1608 | 11% |
| FJ | All | 1233 | 1197 | -3% |
| FJ | NZ | 849 | 580 | -32% |
| FJ | US | 1353 | 1546 | 14% |
| HA | All | 1177 | 1033 | -12% |
| HA | NZ | 1186 | 1171 | -1% |
| HA | US | 1248 | 1030 | -17% |
| NZ | All | 2274 | 2212 | -3% |
| NZ | NZ | 2114 | 1911 | -10% |
| NZ | US | 2586 | 2693 | 4% |
| UA | All | 1873 | 1673 | -11% |
| UA | NZ | 1083 | 1229 | 13% |
| UA | US | 2658 | 1854 | -30% |

Non-premium (discounted economy)

| Dominant Marketing Airline | POS | 2023 | 2024 | CY24vCY23 |
|----------------------------|-----|------|------|-----------|
| AA | All | 1048 | 827 | -21% |
| AA | NZ | 857 | 719 | -16% |
| AA | US | 1153 | 876 | -24% |
| QF | All | 987 | 930 | -6% |
| QF | NZ | 766 | 612 | -20% |
| QF | US | 1119 | 1102 | -2% |
| DL | All | 1155 | 959 | -17% |
| DL | NZ | 865 | 929 | 7% |
| DL | US | 1175 | 950 | -19% |
| FJ | All | | | - |
| FJ | US | | | - |
| HA | All | 1009 | 921 | -9% |
| HA | NZ | 1101 | 1123 | 2% |
| HA | US | 947 | 859 | -9% |
| NZ | All | 1021 | 961 | -6% |
| NZ | NZ | 1018 | 946 | -7% |
| NZ | US | 1086 | 1038 | -4% |

| Dominant Marketing Airline | POS | 2023 | 2024 | CY24vCY23 |
|----------------------------|-----|------|------|-----------|
| UA | All | 888 | 786 | -11% |
| UA | NZ | 782 | 830 | 6% |
| UA | US | 1015 | 766 | -25% |

Premium

| Dominant Marketing Airline | POS | 2023 | 2024 | CY24vCY23 |
|----------------------------|-----|-------|------|-----------|
| AA | All | 6833 | 5670 | -17% |
| AA | NZ | 9181 | 3575 | -61% |
| AA | US | 7237 | 6009 | -17% |
| QF | All | 6284 | 6142 | -2% |
| QF | NZ | 4570 | 3012 | -34% |
| QF | US | 7018 | 6795 | -3% |
| DL | All | 5044 | 4723 | -6% |
| DL | NZ | 10144 | 4856 | -52% |
| DL | US | 4757 | 4692 | -1% |
| FJ | All | 1233 | 1197 | -3% |
| FJ | NZ | 849 | 580 | -32% |
| FJ | US | 1353 | 1546 | 14% |
| HA | All | 5245 | 3744 | -29% |
| HA | NZ | 5594 | 6938 | 24% |
| HA | US | 5163 | 3567 | -31% |
| NZ | All | 4581 | 4608 | 1% |
| NZ | NZ | 4317 | 3807 | -12% |
| NZ | US | 4894 | 5487 | 12% |
| UA | All | 5616 | 5020 | -11% |
| UA | NZ | 4650 | 5323 | 14% |
| UA | US | 5767 | 5255 | -9% |

DFW – Auckland (Bi-directional) - All fares quoted in USD, RT

Total

| Dominant Marketing Airline | Country of Sale | 2023 | 2024 | CY24vCY23 |
|----------------------------|-----------------|------|------|-----------|
| AA | All | 2246 | 2249 | 0% |
| AA | NZ | 1500 | 1347 | -10% |
| AA | US | 2471 | 2449 | -1% |
| QF | All | 3143 | 2957 | -6% |
| QF | NZ | 1031 | 967 | -6% |
| QF | US | 3633 | 3903 | 7% |
| DL | All | 1207 | 1434 | 19% |
| DL | NZ | 1190 | 1152 | -3% |
| DL | US | 1192 | 1539 | 29% |
| FJ | All | 5080 | 1889 | -63% |
| FJ | NZ | 1253 | 570 | -55% |
| FJ | US | 6441 | 2025 | -69% |
| NZ | All | 2988 | 3184 | 7% |
| NZ | NZ | 3309 | 3062 | -7% |
| NZ | US | 2853 | 3001 | 5% |
| UA | All | 3641 | 2233 | -39% |
| UA | NZ | 1872 | 2158 | 15% |
| UA | US | 3990 | 2345 | -41% |

Non-Premium (discount economy)

| Dominant Marketing Airline | POS | 2023 | 2024 | CY24vCY23 |
|----------------------------|-----|------|------|-----------|
| AA | All | 1122 | 978 | -13% |
| AA | NZ | 1092 | 876 | -20% |
| AA | US | 1161 | 996 | -14% |
| QF | All | 1369 | 1131 | -17% |
| QF | NZ | 849 | 789 | -7% |
| QF | US | 1534 | 1365 | -11% |
| DL | All | 1442 | 1283 | -11% |
| DL | NZ | 1190 | 1855 | 56% |
| DL | US | 1454 | 1267 | -13% |
| FJ | All | | | - |
| FJ | US | | | - |
| NZ | All | 1605 | 1386 | -14% |
| NZ | NZ | 1627 | 1378 | -15% |
| NZ | US | 1651 | 1389 | -16% |
| UA | All | 1379 | 999 | -28% |
| UA | NZ | 1393 | 2063 | 48% |
| UA | US | 1390 | 845 | -39% |

Premium

| Dominant Marketing Airline | POS | 2023 | 2024 | CY24vCY23 |
|----------------------------|-----|------|------|-----------|
| AA | All | 6444 | 7228 | 12% |
| AA | NZ | 5019 | 4174 | -17% |
| AA | US | 6687 | 7725 | 16% |
| QF | All | 7881 | 7344 | -7% |
| QF | NZ | 2547 | 2969 | 17% |
| QF | US | 8419 | 7810 | -7% |
| DL | All | 3850 | 3240 | -16% |
| DL | NZ | | 5124 | - |
| DL | US | 3850 | 3182 | -17% |
| FJ | All | 5080 | 1889 | -63% |
| FJ | NZ | 1253 | 570 | -55% |
| FJ | US | 6441 | 2025 | -69% |
| NZ | All | 5115 | 6297 | 23% |
| NZ | NZ | 5928 | 5196 | -12% |
| NZ | US | 4830 | 6822 | 41% |
| UA | All | 6740 | 4989 | -26% |
| UA | NZ | 3981 | 2649 | -33% |
| UA | US | 6964 | 5235 | -25% |

New York (JFK) – Auckland (Bi-directional) - All fares quoted in USD, RT

Total

| Dominant Marketing Airline | POS | 2023 | 2024 | CY24vCY23 |
|----------------------------|-----|------|------|-----------|
| AA | All | 2399 | 2431 | 1% |
| AA | NZ | 1743 | 1498 | -14% |
| AA | US | 2759 | 3012 | 9% |
| QF | All | 2714 | 2829 | 4% |
| QF | NZ | 1485 | 1667 | 12% |
| QF | US | 3304 | 3808 | 15% |
| DL | All | 2503 | 2393 | -4% |
| DL | NZ | 948 | 2153 | 127% |
| DL | US | 2601 | 2430 | -7% |
| FJ | All | 1952 | 1670 | -14% |
| FJ | NZ | 1995 | 1664 | -17% |
| FJ | US | 2055 | 1671 | -19% |
| HA | All | 1508 | 1633 | 8% |
| HA | NZ | 1546 | 1319 | -15% |
| HA | US | 1549 | 2320 | 50% |
| NZ | All | 3103 | 3120 | 1% |
| NZ | NZ | 2749 | 2661 | -3% |
| NZ | US | 3932 | 4299 | 9% |
| UA | All | 2554 | 2944 | 15% |
| UA | NZ | 1671 | 1834 | 10% |
| UA | US | 3331 | 3500 | 5% |

Non-premium (discounted economy)

| Dominant Marketing Airline | POS | 2023 | 2024 | CY24vCY23 |
|----------------------------|-----|------|------|-----------|
| AA | All | 1412 | 1117 | -21% |
| AA | NZ | 1121 | 1069 | -5% |
| AA | US | 1573 | 1205 | -23% |
| QF | All | 1316 | 1146 | -13% |
| QF | NZ | 960 | 871 | -9% |
| QF | US | 1549 | 1392 | -10% |
| DL | All | 1684 | 1352 | -20% |
| DL | NZ | 1058 | 1441 | 36% |
| DL | US | 1728 | 1353 | -22% |
| HA | All | 1328 | 1222 | -8% |
| HA | NZ | 1419 | 1204 | -15% |
| HA | US | 1308 | 1322 | 1% |
| NZ | All | 1360 | 1320 | -3% |
| NZ | NZ | 1317 | 1269 | -4% |

| Dominant Marketing Airline | POS | 2023 | 2024 | CY24vCY23 |
|----------------------------|-----|------|------|-----------|
| NZ | US | 1561 | 1544 | -1% |
| UA | All | 1264 | 1400 | 3% |
| UA | NZ | 1041 | 1124 | 0% |
| UA | US | 1486 | 1598 | -6% |

Premium

| Dominant Marketing Airline | POS | 2023 | 2024 | CY24vCY23 |
|----------------------------|-----|------|------|-----------|
| AA | All | 7296 | 8066 | 11% |
| AA | NZ | 7030 | 4436 | -37% |
| AA | US | 7606 | 9468 | 24% |
| QF | All | 6647 | 6690 | 1% |
| QF | NZ | 3539 | 4345 | 23% |
| QF | US | 7734 | 7901 | 2% |
| DL | All | 7789 | 6072 | -22% |
| DL | NZ | 1078 | 5667 | 426% |
| DL | US | 8047 | 6251 | -22% |
| FJ | All | 1952 | 1670 | -14% |
| FJ | NZ | 1995 | 1664 | -17% |
| FJ | US | 2055 | 1671 | -19% |
| HA | All | 6275 | 7906 | 26% |
| HA | NZ | 8513 | 8110 | -5% |
| HA | US | 5482 | 9311 | 70% |
| NZ | All | 5949 | 5791 | -3% |
| NZ | NZ | 5151 | 4843 | -6% |
| NZ | US | 7183 | 7527 | 5% |
| UA | All | 6964 | 6433 | -8% |
| UA | NZ | 5571 | 5349 | -4% |
| UA | US | 7627 | 6603 | -13% |

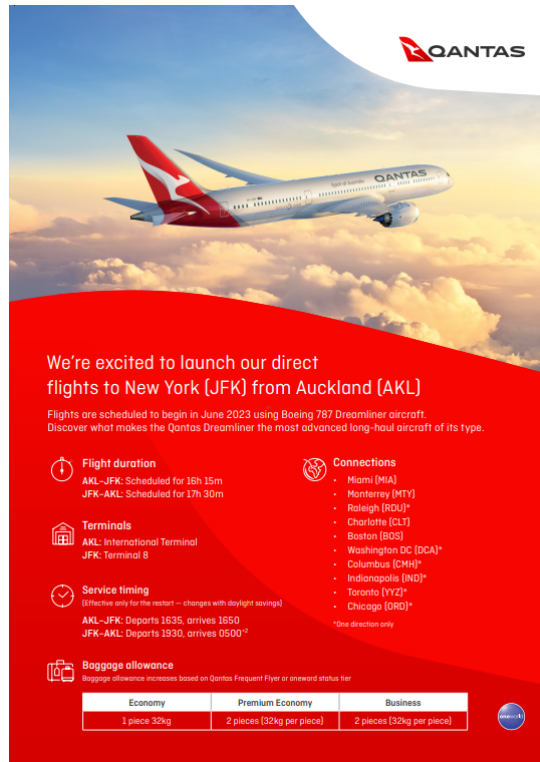
Annexure K – Marketing activities associated with the launch of the Auckland-JFK route

Examples of marketing activities undertaken by Qantas in connection with the announcement of the launch, and commencement, of the Auckland-JFK route are set out below:

1. In March to April 2023, Qantas ran a campaign in New Zealand launching its Auckland-JFK route with significant 'out of home' (OOH) campaign across premium large format billboards across key CBD locations, and streetside 'panoramas' of New York city across sites in Auckland, Wellington and Christchurch. Print media was also used to extend the campaign's reach, with a double page spread in Viva magazine, and digital marketing, including in Stuff and New Zealand Herald. Examples are shown below.



2. Qantas also distributed route launch flyers to agents, announcing the launch of the new schedule, service timing, flight duration and connections in North America via American. Sales incentives for agents were also offered, with the opportunity to win return premium economy seats.



QANTAS

We're excited to launch our direct flights to New York (JFK) from Auckland (AKL)

Flights are scheduled to begin in June 2023 using Boeing 787 Dreamliner aircraft. Discover what makes the Qantas Dreamliner the most advanced long-haul aircraft of its type.

Flight duration
 AKL-JFK: Scheduled for 16h 15m
 JFK-AKL: Scheduled for 17h 30m

Terminals
 AKL: International Terminal
 JFK: Terminal B

Service timing
 (Effective only for the sector - changes with daylight savings)
 AKL-JFK: Departs 1635, arrives 1650
 JFK-AKL: Departs 1930, arrives 0500*

Connections

- Miami (MIA)
- Monterey (MRY)
- Raleigh (RDU)*
- Charlotte (CLT)
- Boston (BOS)
- Washington DC (DCA)*
- Columbus (CMH)*
- Indianapolis (IND)*
- Toronto (YYZ)*
- Chicago (MDW)*

*One direction only

Baggage allowance
 Baggage allowance increases based on Qantas Frequent Flyer or oneworld status tier

| Economy | Premium Economy | Business |
|----------------|---------------------------|---------------------------|
| 1 piece (32kg) | 2 pieces (32kg per piece) | 2 pieces (32kg per piece) |



28 PREMIUM ECONOMY

42 BUSINESS

168 ECONOMY

BUSINESS

Designed with comfort and relaxation in mind. Customers will enjoy:

- Priority check-in counters, dedicated boarding lane and disembarkation access
- Complimentary access to one of our award-winning Qantas Business lounges, where available, or one of our partner airline lounges
- Stretch out in a private Business Suite that reclines to a luxurious fully-flat bed
- Personal on-demand inflight entertainment system
- Complimentary signature Qantas pyjamas and deluxe amenity kits

PREMIUM ECONOMY

Indulgent touches to make customers feel at home:

- Dedicated check-in counter, priority boarding lane and disembarkation access
- Extra legroom and customised seat features to ensure maximum comfort to optimise rest
- Seated in a private and intimate cabin with attentive personalised service
- Complimentary premium amenity kits to stay refreshed

ECONOMY

Discover the premium benefits:

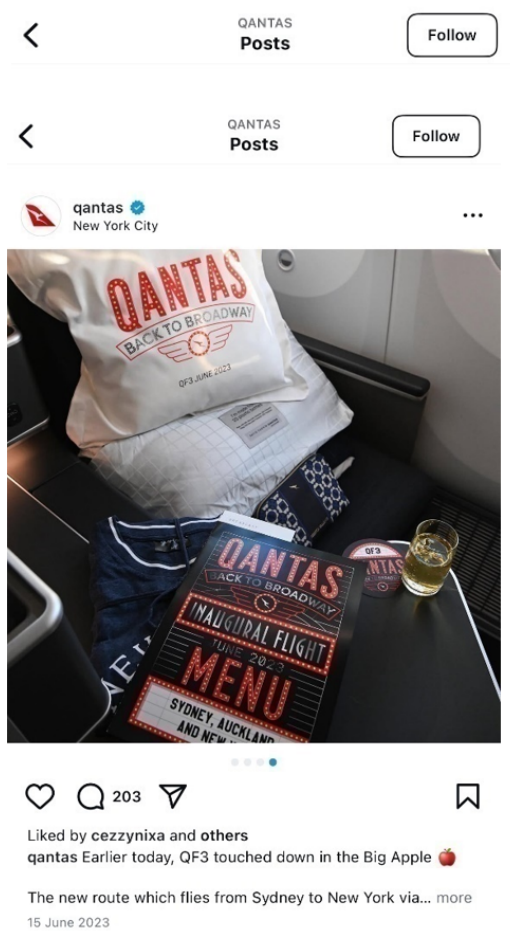
- Refreshed cabin interiors designed for optimal comfort
- Ergonomic slimline seats with softer cushioning and more legroom to maximise rest
- Complimentary stylish amenity kits

3. Launch activities also include a formal launch event in March 2023 at the Park Hyatt Auckland to celebrate the launch, with approximately 150 key industry partners invited to a 'New York met gala themed' event including trade partners, Auckland Airport, and the Qantas leadership team (at a cost of [CONFIDENTIAL]).
4. In June 2023, Qantas undertake widescale marketing to celebrate the route commencing. This included:
 - (a) a Trans-Tasman Business Circle hosting a keynote briefing featuring Alan Joyce AC, Chief Executive Officer and Managing Director, Qantas Airways in Auckland to launch the inaugural service the following day, with the event attended by 150-200 attendees, as well as a cocktail event with high tier frequent flyers (at a cost of [CONFIDENTIAL]).

- (b) a 'false' cover for the New Zealand Herald, with a reach of nearly 1 million readers, funded by funding received from Auckland Airport.



- (c) gate activity for the inaugural flight on 14 June 2023, with 'goodie bags' of merchandise provided to passengers onboard, decoration of the gate and terminal with Qantas and US flags with hot dog stand, pretzel and donut stand handing out food, performers (in NY themed costumes eg. Statue of Liberty) and Matilda welcoming passengers into arrivals hall and Qantas staff with branded flags farewelling passengers. Images from the inaugural flight were promoted on Qantas social media channels, as illustrated below.

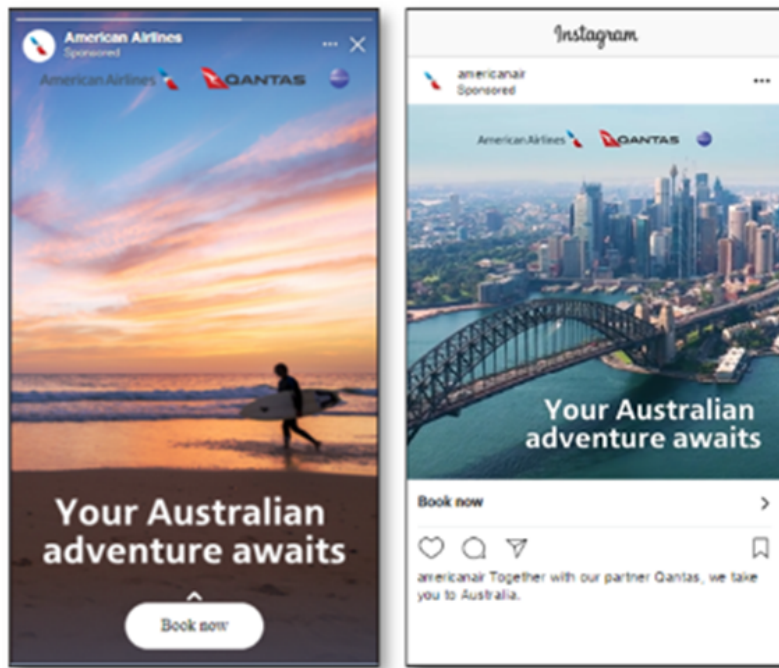


Annexure L – Marketing activities

Set out below are various examples of marketing activities undertaken by the Applicants in respect of the routes and customer benefits associated with the QAJB, since 2022:

1. In September 2022, American launched a co-branded social media ad campaign to inspire Americans to travel to Australia, as illustrated below:

Figure 1: 'Adventure Awaits' Campaign



2. Starting in October through December 2022, American launched another co-branded social media ad campaign to illustrate the ability to travel to a variety of destinations in the QAJB, as shown below.

Figure 2: 'More Destinations' Campaign



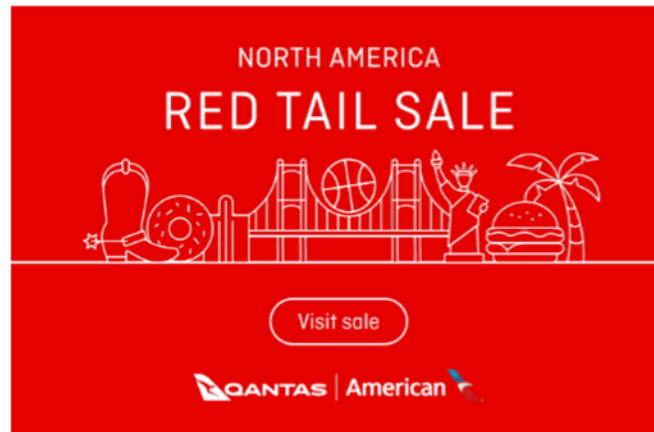
3. The Applicants collaborated on Qantas' marketing campaign called 'I've Been Everywhere', which launched in March 2023 and aimed to inspire travel to New Zealand and Australia from the United States and raise awareness for the QAJB and its benefits for passengers. Qantas produced two

videos for the campaign, which the carriers distributed on social media. An example of TVC/video marketing collateral for the campaign will be provided to the Ministry in a separate annexure.

4. In August 2023, Qantas undertook a co-branded North American Red Tail Sale, with some [CONFIDENTIAL]. Example collateral is shown below:



5. In September 2023, Qantas also ran a co-branded North America Red Tail Sale.



Whether it's a picnic in Central Park, a hike through the Hollywood Hills, or a road trip through Texas, the ultimate adventure is closer than you think. With the North America Red Tail Sale, you can do it all and save on a dream holiday to New York, LA, San Francisco, Dallas, Vancouver and Hawaii.

Plus, see more of North America with over 130 destinations to explore with our partner American Airlines.

Hurry, sale ends 11.59pm (AEST) 25 September 2023, unless sold out prior.*

[Book flights to the USA](#)

[Book flights to Canada](#)



More ways to earn with Qantas and American Airlines

DID YOU KNOW that Qantas Frequent Flyers can earn Qantas Points and Status Credits~ on eligible Qantas and American Airlines flights from Australia and New Zealand to the US, as well as to over 130 codeshare destinations within North America? Make sure you include your Frequent Flyer number in your booking.

[Find out more >](#)

6. In September 2023, Qantas also ran an awareness campaign for its Auckland-JFK route in New Zealand, partnering with Seven Sharp (a New Zealand TV show), across the TV show and their social channels, with the offer of a travel prize ([CONFIDENTIAL]). This was followed by various digital and OOH advertising in Auckland, Wellington, Christchurch, and Queenstown to promote the AKL-JFK route ([CONFIDENTIAL]), and trade media advertising

QANTAS

BE IN TO WIN a Festive Holiday in NEW YORK

Experience a magical Christmas and New Year's with a Business Class return trip for two to New York, NZD \$5,000 spending money & nine nights' accommodation at The Westin Times Square!

Travel dates 25th Dec 2023 - 1st Jan 2024 only.

First Name Last Name

me@email.com Phone

What's on your bucket list to do in New York?

Region

☐ I want to receive the latest Qantas deals and news via email

☐ I accept the [terms and conditions](#)

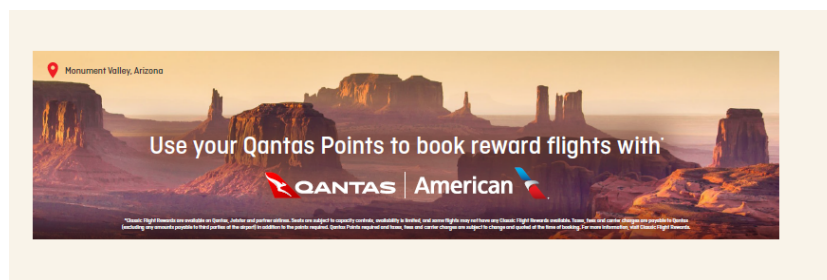
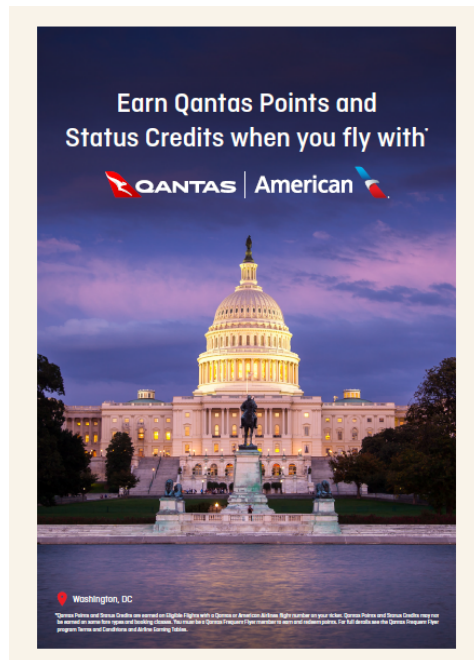
SUBMIT

QANTAS | **THE WESTIN** | **seven**




- Between 2-31 October 2023, the following material was used as Qantas/American airport long term holdings.





8. In October 2023, the below material was shared with 6 million customers in New Zealand, Australia and the US (with reverse copy applying between AU/NZ and US) to promote frequent flyer eligibility and domestic connectivity throughout the US.




More ways to earn with Qantas and American Airlines

Did you know you can earn Qantas Points and Status Credits on eligible Qantas and American Airlines flights from Australia and NZ to the US, as well as to over 130 codeshare destinations within North America? Make sure you include your Frequent Flyer number in your booking.+

[Find out more >](#)

9. Additionally, in October 2023, the marketing collateral below was shared with some 397,000 New Zealand customers via Qantas' eNews service.

News and special offers




It's now operating four weekly flights direct to NYC from Auckland

More flights to the big apple

Following the launch of our direct Auckland-New York route earlier this year, we're increasing flights to four per week from 30 October. Relax in our 787 Dreamliner Business, Premium Economy and Economy cabins, each designed for your comfort.


[Book now](#)



Daily flights Wellington to Brisbane

We're excited to launch daily flights from Wellington to Brisbane on 29 October. Explore the sophisticated urban city, juxtaposed with natural experiences, shopping precincts and world-class sporting events.


[Explore Brisbane](#)



All new tech at Qantas Marketplace

Earn 3 points per \$1 on the new iPhone and Apple Watch series from Apple. Plus, upgrade your seats with the new Qantas ComfortLife Headphones and Kmartuhi from Waka.


[Shop now](#)



Unwind at voco Auckland City Centre with Qantas Luxury Holidays

Enjoy complimentary drinks, daily breakfast, stunning city views and more from just AUD\$66 for two nights for two adults. Plus earn 3 Qantas Points per \$1 spent.


[Book now](#)



More ways to earn with Qantas and American Airlines

Did you know you can earn Qantas Points and Status Credits on eligible Qantas and American Airlines flights from New Zealand to the US, and to over 130 additional destinations within North America? Make sure you include your Priority Flyer number in your booking.


[Book out now](#)



Enjoy great value with Qantas Tours 2 for 1 Vietnam

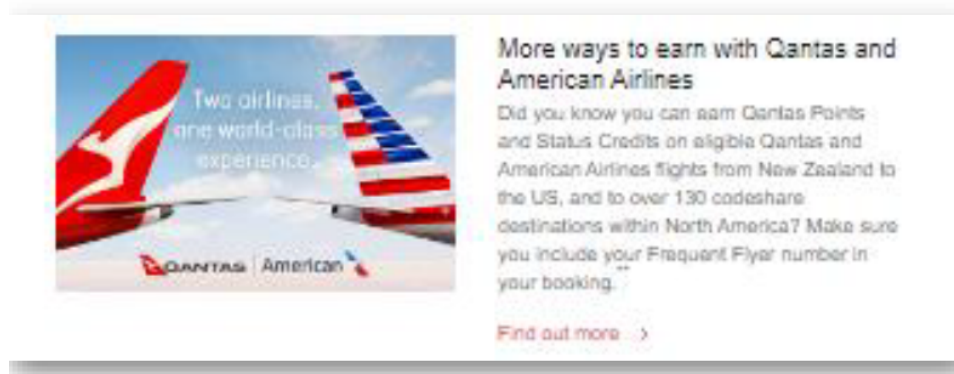
Experience the exotic landscapes and unique culture of Hoi An, Ha Long Bay, Hoi An and more on a small group tour for AUD\$5,000 for two people twin share. The 12-day trip includes return flights, daily breakfast, accommodation and an overnight cruise.

[Book now](#)



Book 4 days and get the 4th day free, plus a SUV upgrade

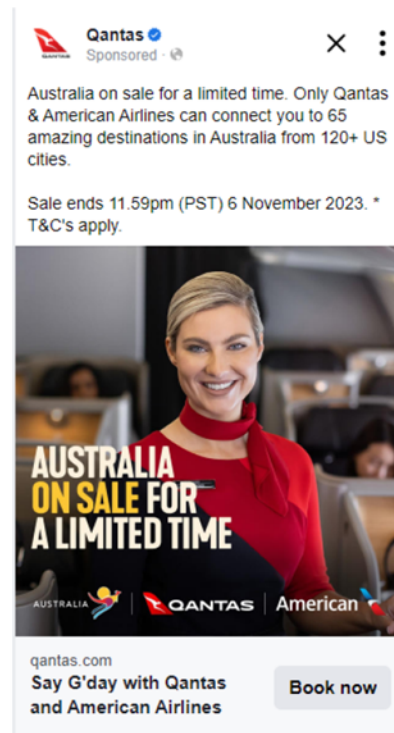
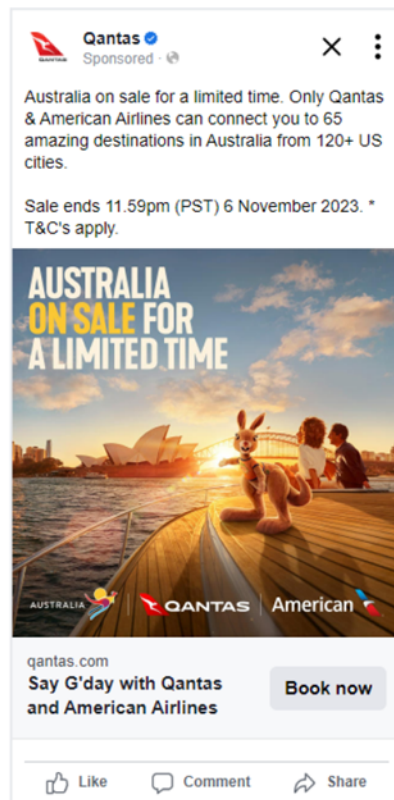
Hire a car for 4 days or more with Avis and receive the 4th day free. Plus, receive a free SUV upgrade when you rent from a selected car group. The fix on top of the 750 Qantas Points you'll earn for every rental. Book and travel before 17 December 2023.



10. By way of another example, on 31 October 2023, the Applicants launched the 'Come and Say G'day Australia Sale' on Qantas flights from LAX, SFO, DFW, and JFK.⁶⁹ This was the second year in a row that Qantas and American collaborated with Tourism Australia to promote travel and booking to over 60 Australian destinations, adopting Tourism Australia's global creative and assets and featuring QAJB co-branding for North American markets. American invested a total value of [CONFIDENTIAL] on this campaign, supporting the campaign through aa.com homepage hero banners, newsletters, mobile app features, and a dedicated landing page on the aa.com website. Tourism Australia and Qantas invested [CONFIDENTIAL] on paid social media advertising, paid display advertisements, and advertising on the Qantas-owned channels such as website and email.
11. An example of the joint marketing used in this campaign is set out below.



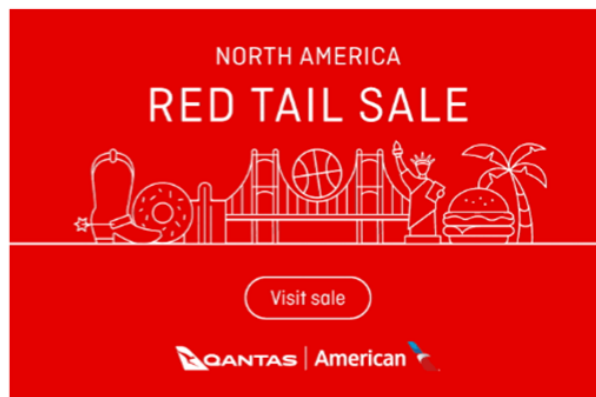
⁶⁹ "Come and Say G'day Australia Sale," Qantas (Oct. 31, 2023), <https://www.qantas.com/agencyconnect/us/en/agency-news/agency-news-october-23/come-and-say-gday-australiasale-posus.html#:~:text=Help%20your%20customers%20to%20get,connections%20available%20across%20the%20US.>



12. An example of TVC/video marketing collateral for the campaign will be provided to the Ministry in a separate annexure.
13. In November 2023, the full page ad, marketing the QAJB with co-branding, below was displayed on Qantas' GLOBAL in-flight magazine with a readership of 412,000 customers per month.



14. During late November and early December 2023, Qantas launched another co-branded North America Red Tail Sale. Example marketing material is shown in below, illustrating the campaign's promotion of the behind / beyond connectivity enabled by the QAJB. The material below was distributed to 5.6 million users.



Venice Boardwalk, Griffith Observatory, Hollywood stargazing, Disneyland, and that's just LA. Design your own North American escape with great sale fares to Los Angeles, New York, Dallas, San Francisco, and Vancouver.

Plus, you can see more of North America with over 130 destinations to explore with our partner American Airlines.

Hurry, sale ends 11.59pm (AEDT) 4 December 2023, unless sold out prior.*

[Book flights to the USA](#)

[Book flights to Canada](#)

More ways to earn with Qantas and American Airlines

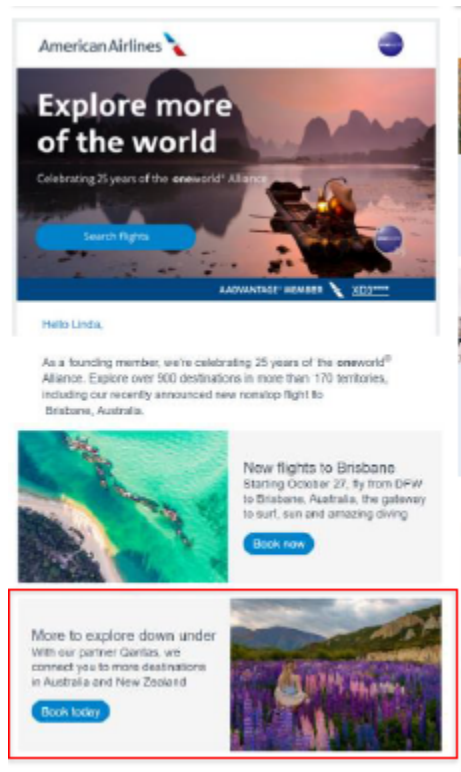
Did you know that Qantas Frequent Flyers can earn Qantas Points and Status Credits^A on eligible [Qantas and American Airlines](#) flights from Australia and New Zealand to the US, as well as to over 130 codeshare destinations within North America? Make sure you include your Frequent Flyer number in your booking.

[Find out more](#)

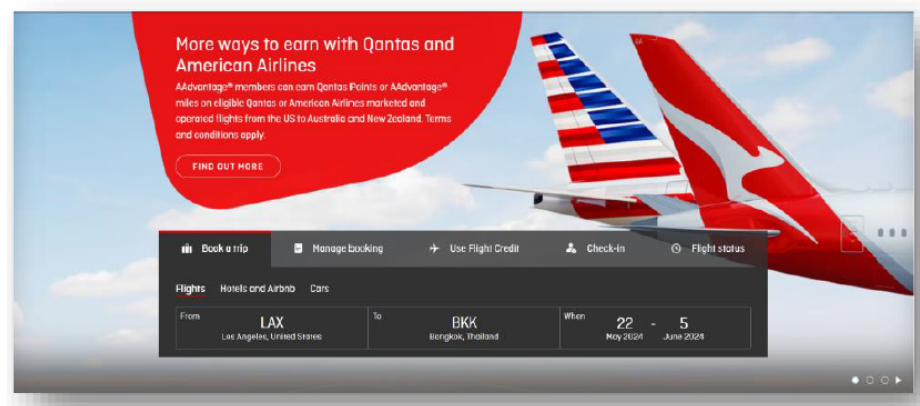
Two airlines. one world-class experience.

[QANTAS](#) | [American](#)

15. The following collateral was displayed by American Airlines as part of a US e-newsletter campaign in February 2024.

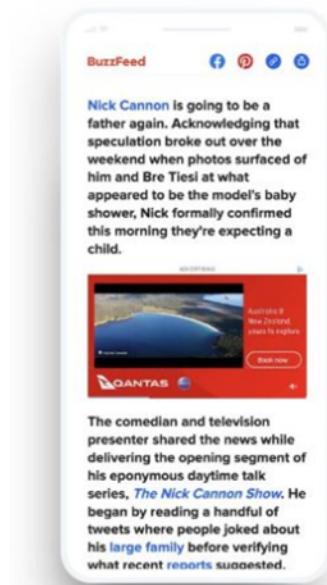


16. In February 2024, Qantas also an awareness campaign for its Auckland-JFK route in New Zealand, across various digital and OOH advertising in Auckland, Wellington and Christchurch and Queenstown ([CONFIDENTIAL]).
17. In February 2024, Qantas re-launched the 'I've Been Everywhere,' campaign. An example of TVC/video marketing collateral for the campaign will be provided to the Ministry in a separate annexure. Some of the other co-branded collateral associated with this campaign is set out below.

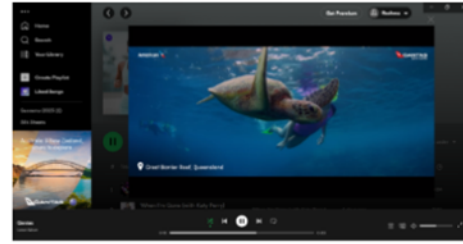


18. An example of TVC/video marketing collateral for this campaign will be provided to the Ministry in a separate annexure.

InRead Video Skin Landscape 15s - 'US' (Teads) Mobile



Spotify Advertisement (Video)



In-Screen Expandable Video – US (Gum Gum)



19. In March 2024, Qantas launched another co-branded North America Red Tail Sale, with similar marketing collateral, as illustrated below.

NORTH AMERICA RED TAIL SALE

Visit sale

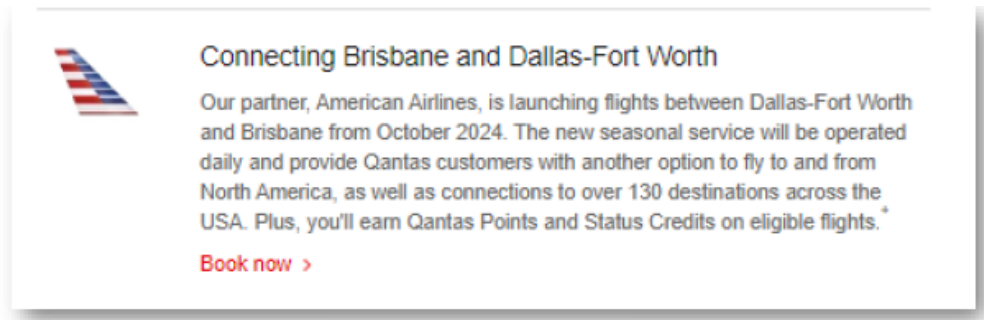
Your North American adventure awaits with Los Angeles, San Francisco, Dallas, New York and Vancouver all on sale for a limited time only.

Take in views from the Golden Gate Overlook, visit Disneyland with the family or dive into the bustling streets of the Big Apple for a trip you'll never forget. Plus, you can take your trip even further and explore over 130 destinations across North America with our partner American Airlines.

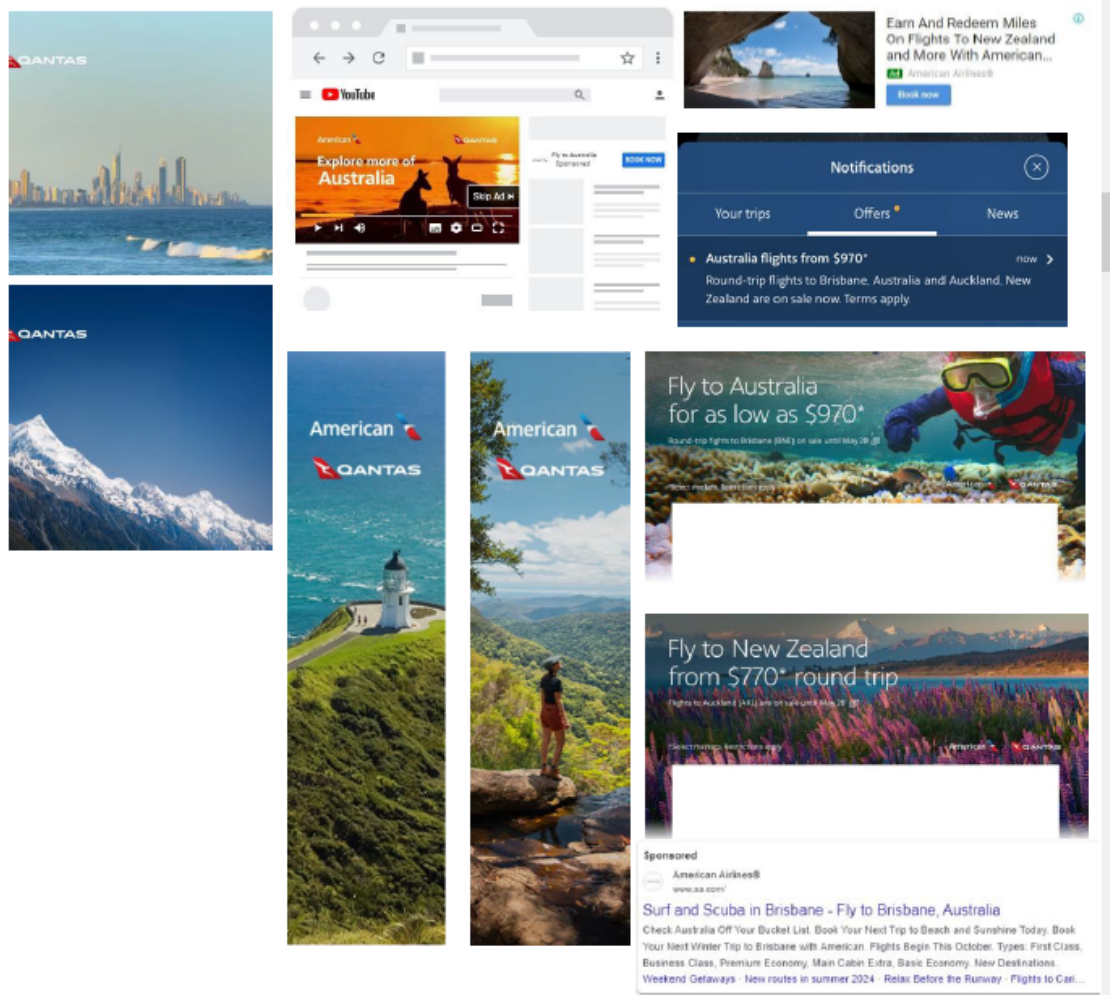
Don't miss out, sale ends 11.59pm (AEDT) 12 March 2024, unless sold out prior.*

Find sale fares

20. On 6 March 2024, the marketing banner shown below was shared with 7.9 million users by Qantas in its GLOBAL Flying News on 6 March 2024 to notify customers of the launch of American Airlines' Brisbane-Dallas Fort Worth service.



21. In May 2024, the Applicants undertook a dedicated joint QAJB campaign and tactical sale, for US point of sale, to raise awareness of the joint business and enhance bookings, including for American's AKL-DFW and BNE-DFW services. This included a [CONFIDENTIAL] spend on paid media (including display advertising and social media) as well using owned channels (including aa.com hero banner) with an estimated value of [CONFIDENTIAL]. This led to a significant lift in bookings, relative to 2023. Examples of the co-branded, joint marketing for this sale campaign are set out below.



22. The following banner utilised in the QAJB campaign and tactical sale attracted [CONFIDENTIAL] spot clicks relating to Auckland, whilst the following homepage attracted [CONFIDENTIAL] page visits and [CONFIDENTIAL] bookings during 20 May to 26 June 2024.



Hello William,

Looking to extend your summer this year? Together with our partner airline Qantas, flights to Brisbane, Australia and Auckland, New Zealand are on sale for a limited time. Book before May 28 to secure your ticket to outdoor adventures, stunning landscapes and unique wildlife.



Don't forget to use your AAdvantage® credit card to book your next trip and earn AAdvantage® miles and loyalty Points!



Auckland flights from \$770*
For a limited time, round-trip fares are on sale to New Zealand's largest city and its gorgeous scenery

[Book today](#)


Explore more of Australia
Enjoy surf and sun this winter with nonstop flights to Sydney, Melbourne and more

[Book today](#)



Flying on Qantas?
You can now request an upgrade on select flights using cash or AAdvantage® miles


[Learn more](#)



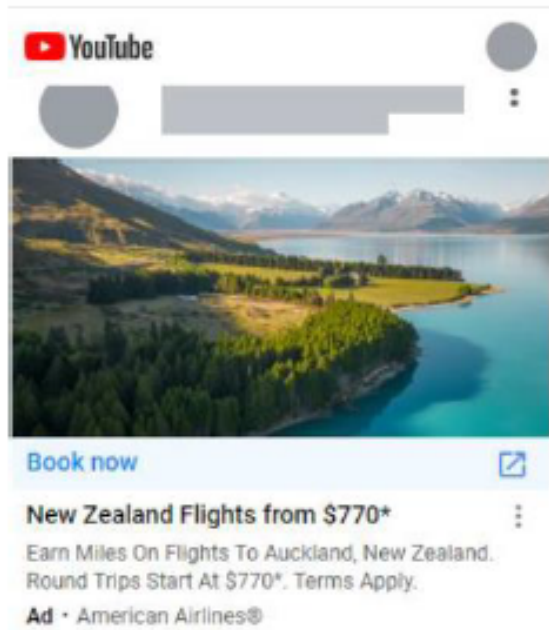
Fly to New Zealand from \$770* round trip

Flights to Auckland (AKL) are on sale until May 28 (ET)

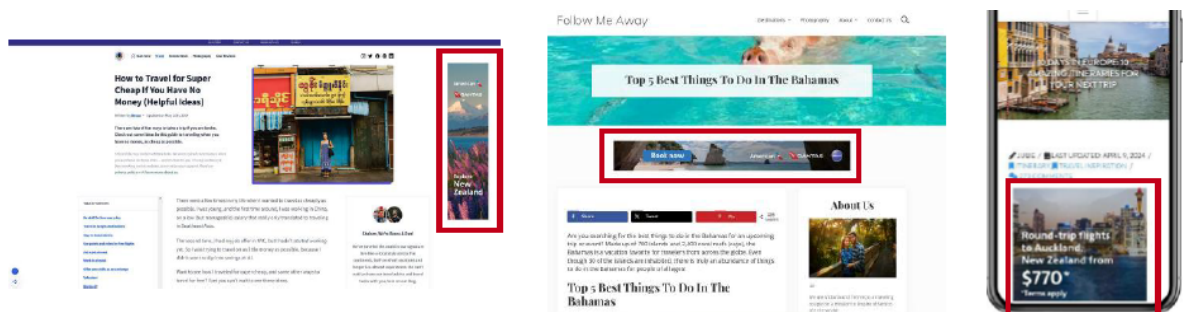
*Select markets. Restrictions apply

American  QANTAS

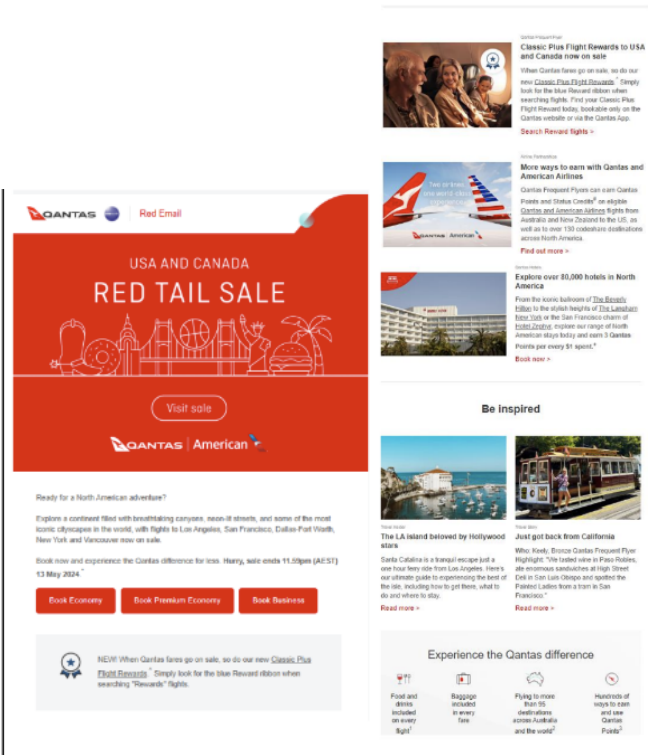
23. The promotion was advertised across a variety of platforms including YouTube and social media (where social media material associated with the campaign attracted [CONFIDENTIAL] clicks in New Zealand based on an upfront spend of [CONFIDENTIAL]).



24. Banner ads (examples shown below) associated with the campaign attracted [CONFIDENTIAL] clicks and [CONFIDENTIAL] page visits based on an upfront spend of [CONFIDENTIAL].



25. In May 2024, Qantas announced a co-branded US – Canada Red Tail Sale. Examples of the joint marketing campaign collateral are shown below.



27. In September 2024, Qantas launched a new brand campaign in the North American market as demand for travel between the US and New Zealand and Australia continued to grow. Qantas

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Group Chief Marketing Officer Petra Perry said the campaign was designed to share the spirit of Australia with the North American market as more travellers consider a holiday down under.



28. The following are examples of material that is 'always on' and displayed by American Airlines in addition to any targeted campaign associated with the QAJB.

Explore these great offers



New flights from Brisbane

Fly nonstop to DFW and connect to more than 200 cities in North America.

[Book now »](#)



Flagship® Business

Where maximum comfort meets premium service.

[Learn more »](#)



Europe's calling

Plan your next trip to London or Europe with our great fares.

[Book trip today »](#)



More rewarding, together

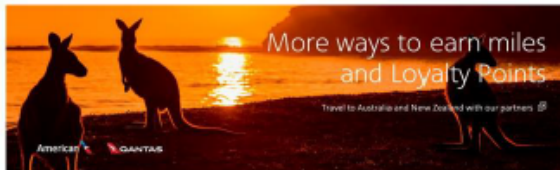
Earn and redeem with AAdvantage® miles when flying with our partner, Qantas Airways.

[Search flights »](#)

Earn AAdvantage® miles when flying with Qantas

Book your trip to Australia and New Zealand »

American  QANTAS



More ways to earn miles and Loyalty Points

Travel to Australia and New Zealand with our partners »

American  QANTAS

American Airlines Flight Deals

Round Trip

1 Adult, Economy Class

Book with Q&A

From

City or airport

To

City or airport

Depart

28-03-2024



Return

01-04-2024



Search

[Home](#) > [American Airlines flights](#)

Looking for flights? See round trip options.

| Type | To | Budget | From |
|-----------------|-----------------|------------------|-------|
| City or airport | City or airport | input max budget | Empty |

| Route | Dates | Price | Updated |
|--------------------------------------|-------------------------|-----------|--------------------|
| Sydney (SYD) to Los Angeles (LAX) | 08/08/2024 - 15/08/2024 | AUD1,471* | Updated 1 hour ago |
| Brisbane (BNE) to Vancouver (YVR) | 05/08/2024 - 18/08/2024 | AUD1,676* | Updated 1 hour ago |
| Melbourne (MEL) to Los Angeles (LAX) | 12/08/2024 - 24/08/2024 | AUD2,431* | Updated 1 hour ago |
| Sydney (SYD) to Vancouver (YVR) | 28/08/2024 - 01/09/2024 | AUD1,987* | Updated 1 hour ago |


*Some disallowed have been collected with the set offers and may no longer be available at time of printing. Some items listed may include one or more accessories that are being Economy, which also is subject to additional restrictions. Availability of the information may result in a different list. To find the most updated list, please visit www.hugoboss.com. www.hugoboss.com for the list of special products and service the way.

More Destinations Together

Our partnership with Delta takes you to the U.S. and beyond when you fly with American or Delta. You can earn and redeem Delta[®] Miles, plus enjoy the benefits of Delta[®] Status on both airlines.



Annexure M – American internal announcement of QF Prime rebookings and examples of email notifications

 **Release Announcement**

QF Prime Rebookings in AURA
Reacom
Airport Efficiencies
2024-11-14

Overview
AURA (Automated Reacom) now has the ability to rebook disrupted passengers using Qantas Airways (QF) Prime flights. Previously, when disruption occurred on an American flight causing impact to a downline Qantas flight, passenger be accommodated by either speaking with an agent or calling reservations. Now we can use automation to rebook passengers connecting on Qantas. Booking to Prime during disruption is the industry standard; QF joins AY, IB, and JL for Prime flights in AURA. We will continue to add additional carriers over the next months.


Benefit
Passengers will now be rebooked and reticketed on QF Prime following disruption. They will receive a notification with QF's confirmed flight information, a confirmation code, and a check in link to retrieve an QF boarding pass. By rebooking to QF Prime, we now can access QF's entire network of flights.

Key Contacts and Contributors
Customer Experience Reacom, IT Reacom, Seamless Partnerships, Integrated Operations Center (IOC), Customer Notifications Engine (CNE), Customer Experience Baggage Services, Policy and Procedure, PTOL, Qantas Airways, Solution-Tek (vendor)


Please reach out to Carolyn at Carolyn.Hannah@aa.com with any questions on this release.

Forward this email to any additional contacts you think should receive it. Reach out to DL_CommercialPMO (DL_CommercialPMO@aa.com) if you have any questions or feedback on this automated email.

For a list of all releases please follow this [link](#)



Email notification for a rebooking to AA flight followed by QF flight. Check in with AA.



You've been rebooked - Action is required

Confirmation code: **PPDALP**
Qantas Airways confirmation code: **49LJAQ**

Due to a delay, you'll miss your connecting flight. We have rebooked you on the best available flight. You must get a new boarding pass for each passenger. If you checked bags, we will transfer them to your new flight.

We made these changes:

- New depart date: Wednesday, November 13
- Number of stops now: 2
- New connecting airport
- All passengers rebooked

[Get boarding pass](#)

If you checked bags, we will transfer them to your new flights. You will also need to see a Qantas Airways agent so they can enter your bag tag numbers into their system.

NEW TRIP

Wednesday, November 13, 2024

 **HOU** **AA 3635**
Houston Hobby
12:25 PM
Operated by American Eagle

 **DFW**
Dallas/Fort Worth
1:45 PM
Aircraft: Embraer 175
Class: Economy

 **DFW** **AA 1676**
Dallas/Fort Worth
3:00 PM
Aircraft: Airbus A321
Class: Economy

 **LAX**
Los Angeles
4:26 PM

 **LAX** **QF 16**
Los Angeles
8:10 PM
QANTAS
Aircraft: Class: Economy

 **BNE**
Brisbane
5:00 AM

MISSED CONNECTION

Tuesday, November 12, 2024

 **HOU** **AA 6530**
Houston Hobby
6:19 PM

 **DFW**
Dallas/Fort Worth
7:50 PM

 **DFW** **AA 7**
Dallas/Fort Worth
9:50 PM

 **BNE**
Brisbane
6:31 AM

| Original Inventory | | | | | | | | | | Proposed Inventory | | | | | | | | | |
|--------------------|----------|--------|-----|-----|----|-----|------------|---------------|--|--------------------|----------|--------|-----|-----|----|-----|------------|-------------|--|
| Status | Flight # | Date | ORD | DES | CL | CBN | STG/ST | STG/ST% | | Status | Flight # | Date | ORD | DES | CL | CBN | STG/ST | STG/ST% | |
| | AA608 | 16-NOV | ROM | DFW | Y | Y | 16-NOV | 16-NOV | | | AA608 | 16-NOV | ROM | DFW | Y | Y | 16-NOV | 16-NOV | |
| | AA607 | 16-NOV | DCN | BNE | Y | Y | 21NOV14:41 | 16-NOV11:16-2 | | | AA1576 | 16-NOV | DCN | LAR | Y | Y | 15NOV16:38 | 16-NOV16:38 | |
| | | | | | | | | | | | QF016 | 16-NOV | LAR | BNE | Y | Y | 21NOV17:16 | 16-NOV17:16 | |

American

You've been rebooked -
Action is required

Confirmation code: QGNSVA
Qantas Airways confirmation code: 34Q5CE

One of your flights was delayed, so we rebooked you on the best available flight with our partner, Qantas Airways. We're sorry for the change to your travel plans.

We made these changes:

- New airline
- New departure time
- All passengers rebooked

Get Qantas Airways boarding pass

Next steps:

- Check in to get boarding passes on Qantas Airways.
- If you checked bags, show your bag tag numbers to the American agent so they can transfer your bags.
- Before boarding, show the Qantas Airways agent your bag tag numbers so they can add your checked bags into their system.

NEW TRIP

Tuesday, November 5, 2024

LAX
Los Angeles
9:20 PM

Sydney
7:25 AM

QANTAS
QF 12

Aircraft:
Class: Economy

MISSED CONNECTION

Tuesday, November 5, 2024

LAX
Los Angeles
2:45 PM

San Francisco
4:12 PM

AA 4971

SFO
San Francisco
8:20 PM

Sydney
6:10 AM

AA 7396

[illegible]

Annexure N– Background and Methodology for Calculation of QAJB Benefits

1. This Annexure provides details on the methodology and calculations underlying the:
 - (a) benefits from the introduction of new nonstop services referred to in paragraphs [11.62]-[11.68] of the Application; and
 - (b) benefits from the elimination of double marginalisation, referred to in paragraphs [11.113]-[11.117] of the Application.
2. In particular, the first section describes the calculation of benefits based on the estimated demand stimulating effect of new nonstop routes. The second section of the Annexure discusses the calculation of benefits from new nonstop routes based on the value of travel time savings. The third section discusses the extension of the calculation to also include benefits from reduction in the number of connections. Finally, the last section discusses the calculation of benefits from elimination of double marginalisation.

Benefits from new nonstop demand stimulation

3. New nonstop routes are included in the calculation of benefits provided that they were introduced after the approval of the expanded JB in 2015 and are still in operation today.⁷⁰
4. The first methodology for quantifying benefits from new nonstop routes is based on estimating the demand stimulating effect of such services. The benefits that these new nonstop services create are reflected in the significant increase in traffic carried by the QAJB on these routes following the introduction of the service, as this increase shows that consumers value the nonstop service to a much greater degree than the connecting service that was previously available. The approach relies on the demand increase that is reflected in this new traffic to quantify the consumer benefits from such new services, based on methods precisely analogous to those previously used by the US DOJ in evaluating mergers.⁷¹
5. The first step in determining the benefits from new nonstop service is to determine the size of the QAJB traffic increase. This is done through an event-study regression.⁷² The regression data includes all city-pairs between New Zealand or Australia and the United States that had traffic on the QAJB carriers (nonstop or connecting) in every quarter between the second quarter of 2015 and the fourth quarter of 2024 (a balanced panel).^{73,74} An observation in the regression is an origin-destination pair – year – quarter combination. The main variable of interest (dependent variable in the regression) is the natural log (used in order to measure effects in percentages) of the total number of QAJB passengers for each observation. The explanatory variables of interest

⁷⁰ DFW-AKL was introduced in the fourth quarter of 2022; JFK-AKL was introduced in the second quarter of 2023; LAX-AKL was introduced in the second quarter of 2016.

⁷¹ Ken Heyer, Carl Shapiro, and Jeffrey Wilder, “The Year in Review: Economics at the Antitrust Division, 2008–2009,” Review of Industrial Organization, Vol. 35, No. 4, December 2009, 349-367 at §2.4.

⁷² The regression data is based on Sabre MIDT data, with IATA-adjusted passenger counts to adjust for the carriers that are underrepresented in raw MIDT data. Additional control variables (discussed below) are created using the USDOT’s Form 41 T-100 International Segment database to identify carrier presence on nonstop routes.

⁷³ The period from the second quarter of 2020 through the first quarter of 2023 is excluded from the data due to the adverse effects of the COVID-19 pandemic on international travel to/from New Zealand and Australia.

⁷⁴ Results are qualitatively and quantitatively similar when not limiting to a balanced panel, i.e., when including city-pairs where the QAJB carriers did not operate during every quarter of the data (after excluding the COVID-19 period).

are indicators for each new nonstop route, which are turned on for the full period from the new QAJB nonstop introduction until the end of the data.⁷⁵

6. Event study results for the three new nonstop services between New Zealand and the United States are presented in Figure 1 below. As seen in the table, each of the new routes led to large, statistically significant increases in traffic, demonstrating the large consumer benefits from nonstop service, which are next converted into dollar values.

Figure 1: Effect of New QAJB Nonstop Service on QAJB Route Traffic

| Dependent variable: QAJB O&D traffic | All Fare Classes, Balanced Panel |
|---|---|
| Variables | |
| New QAJB Nonstop on Auckland-NYC | 150.58% *** |
| New QAJB Nonstop on Auckland-Dallas/Fort Worth | 33.02% *** |
| New QAJB Nonstop on Auckland-Los Angeles | 86.10% *** |
| QAJB Nonstop Exit on Route | -65.69% *** |
| New Non-QAJB NoNonstop on Route | -27.10% |
| Non-QAJB Nonstop Exit on Route | 40.40% *** |
| Observations | 16,874 |
| R-squared | 0.86 |
| Adj. R-squared | 0.83 |
| F-statistic | 4910.59 |
| Prob > F | 0 |

Statistical significance of underlying coefficients: *** p<0.001, ** p<0.01, * p<0.05.

Sources: MIDT data 2015 Q2-2024 Q3; T100 International Data

Notes:

1. Auckland-Dallas is a seasonal route and the data only contains two full seasons of operation.
2. The reported F-statistic and associated p-value are calculated for the joint significance of the parameters indicated in the regression table and exclude the fixed effects applied to the regression.
3. Percentage effects calculated as $\exp(\text{coef})-1$.
4. Standard errors clustered on non-directional route-quarter combinations.

7. The next step is to convert these QAJB traffic increases into consumer welfare gains. This is done by first determining the size of the QAJB price reduction that would have generated a QAJB traffic increase of the same size ("equivalent price reduction"), assuming constant elasticity

⁷⁵ The regression includes indicator variables for all six new nonstop routes that were introduced by the QAJB carriers after the expanded JB approval in 2015 (DFW-MEL, DFW-BNE, and SFO-SYD are the three new nonstop routes between the US and Australia). Additional control variables include an indicator for QAJB nonstop exit on route (which is turned on when a QAJB member that was present on the route in the second quarter of 2015 ceases operating the service); an indicator for new non-AJB nonstop on the route (which stays on as long as there is at least one new entrant on the route), and an indicator for a non-QAJB nonstop exit on the route (which is turned on when a non-QAJB carrier that was present on the route in the second quarter of 2015 ceases to offer nonstop service). For the six city pairs where a new QAJB nonstop service was introduced the entry and exit indicators are only turned on if the respective entry or exit occurred *before* the introduction of the new QAJB nonstop service. Thus, the new nonstop indicators capture the all-in effect of new nonstop entry on QAJB traffic, including any subsequent competitive responses. As is standard in event studies, the regression also includes year-quarter fixed-effects and Origin-Destination-quarter fixed effects. Standard errors are clustered on Origin-Destination.

demand curve and using estimated elasticity of demand from Berry and Jia (2010).⁷⁶ A constant elasticity demand curve is the most conservative demand curve to use among those meeting the standard condition that price elasticity does not fall as price goes up (any non-constant elasticity demand curve would require larger price reductions to generate the observed increase in traffic and thus imply greater consumer benefits).

8. Specifically, the demand curve is assumed to be given by the following equation, where a and b are nonnegative parameters to calibrate:

$$q = e^a p^{-b}$$

The value of the parameter b is the elasticity of demand, for which Berry and Jia's (2010) elasticity estimate is used. The value of the parameter a can be determined from the following equation, using pre-new nonstop introduction fares and passengers:

$$e^a = q_{pre} p_{pre}^b$$

9. For such a constant-elasticity demand curve, the equivalent price reduction is:

$$\Delta p = \left(\left(\frac{\Delta q}{q_{pre}} + 1 \right)^{-\frac{1}{b}} - 1 \right) p_{pre}$$

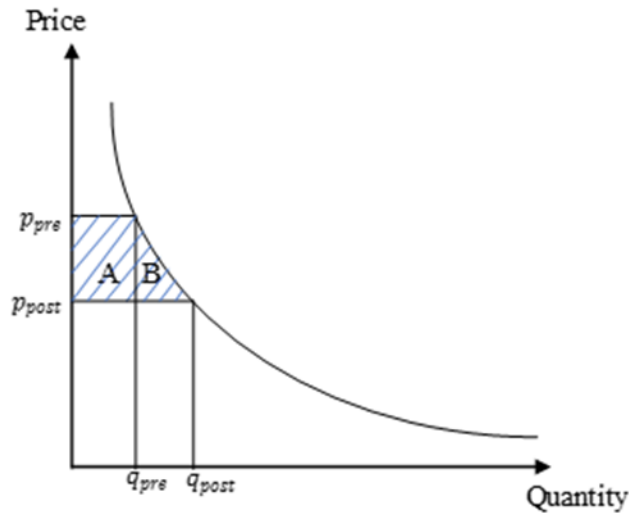
where $\frac{\Delta q}{q_{pre}}$ is the estimated percentage quantity increase from the event-study regression.

10. Economic literature shows that, under common assumptions about consumer utility, this equivalent price reduction can be treated like an actual price reduction to determine consumer welfare benefits.⁷⁷ To convert these fare reductions into consumer welfare gains, in dollars, one should not simply multiply the fare reduction by the number of passengers flying connecting itineraries, as this would overstate consumer benefits, by failing to account for the fact that some of the passengers who flew the route after the new nonstop service was introduced (the " Δq " portion) would not have flown the route absent the new nonstop and thus do not benefit from the full price reduction.
11. Instead, starting from a calculation based on the equivalent price reduction multiplied by the number of passengers, one must deduct the "triangle" that is below the previous fare but above the demand curve for these new passengers to account for this lower valuation for new passengers. In technical terms, this is accomplished by properly computing consumer welfare as the area under the demand curve (and above price) both using the pre-introduction price and the price after the equivalent price reduction (" p_{post} " in the figure below), then computing the increase in consumer welfare as the increased area under the demand curve with the equivalent price reduction. As seen in Figure 2 below, consumer welfare is the shaded area between the pre- and post-price reduction price and the demand curve.

⁷⁶ Steven Berry and Panle Jia (2010), "Tracing the Woes: An Empirical Analysis of the Airline Industry," *American Economic Journal: Microeconomics*, Vol. 2, No. 3, August 2010, 1-43 ("Berry and Jia (2010)"), Table 7B. The authors estimate own elasticity of demand for individual carriers at $-b = -2.10$.

⁷⁷ See Robert D. Willig, "Unilateral Competitive Effects of Mergers: Upward Pricing Pressure, Product Quality, and Other Extensions," *Review of Industrial Organization*, Vol. 39, No. 1, July 2011, 19-38 at §3.

Figure 2: Demand Curve and Consumer Welfare



12. Given the above, total consumer benefit from demand stimulation can be expressed as:

$$q_{pre} p_{pre} \frac{1 - (1 + \frac{\Delta p}{p_{pre}})^{1-b}}{1-b},$$

Where $\frac{\Delta p}{p_{pre}}$ is given by the expression in ¶8, above.

13. The pre-introduction price is based on the average QAJB carriers' fare for each city-pair in the USDOT International Origin and Destination Survey data during the four quarters prior to the new nonstop introduction. The pre-introduction passengers are based on the average monthly QAJB passengers on the city-pair in MIDT during the four quarters prior to the new nonstop introduction.⁷⁸
14. Figure 3 provides the estimated demand stimulation from the above regression. The estimated annual benefits from each new nonstop route between New Zealand and US are calculated based on this approach. The annual benefits are converted to NZD and multiplied by five to obtain the five-year forward looking benefits in NZD for each new nonstop route.⁷⁹

Figure 3: Benefits from QAJB New Nonstop Introduction Based on Estimated Demand Stimulation (in NZD)

| City Pair | Estimated Demand Stimulation | Predicted New Nonstop Benefits | |
|--|------------------------------|--------------------------------|----------------|
| | | Annual | Five-Year |
| Dallas/Fort Worth, TX -- Auckland, New Zealand | 33% | NZD 1,855,484 | NZD 9,277,421 |
| New York City, NY -- Auckland, New Zealand | 151% | NZD 4,607,454 | NZD 23,037,269 |
| Los Angeles, CA -- Auckland, New Zealand | 86% | NZD 5,565,579 | NZD 27,827,897 |
| New Zealand Total New Nonstop Benefits | | NZD 12,028,517 | NZD 60,142,587 |

Sources: MIDT through 2024 Q4, DOT T100 International Segment Data, DOT International O&D Survey, <https://www.exchange-rates.org/exchange>

⁷⁸ In instances where the four-quarter period prior to the new nonstop introduction falls wholly or partially during the omitted COVID-19 period (2020 Q2 through 2023 Q1), the most recent four-period quarter prior to that was used. In particular, for DFW-AKL and JFK-AKL the period from 2019 Q2 through 2020 Q1 was used as the pre-introduction period.

⁷⁹ The benefits are converted to NZD using the average 2024 USD-NZD exchange rate (1 USD = 1.6538 NZD) (available at <https://www.exchange-rates.org/exchange-rate-history/usd-nzd-2024>).

Benefits from travel time saving on new nonstop routes

15. The travel time savings for each new nonstop route are calculated per roundtrip, separately for each city-pair and season. For each city-pair, direction, and season the time savings are based on the difference between the current nonstop travel time and the travel time on the shortest hypothetical routing.⁸⁰
16. The shortest hypothetical routing is based on Qantas/American itineraries that would have existed but-for the QAJB. Specifically, the hypothetical routings must include a US-Australia segment that Qantas operated prior to the expanded QAJB approval in 2015 (American did not operate any US-Australia or US-New Zealand services pre-approval).⁸¹ For example, the hypothetical routings from DFW to AKL include: DFW->LAX->SYD->AKL; DFW->LAX->MEL->AKL; DFW->LAX->BNE->AKL; and DFW->HNL->SYD->AKL.
17. The travel time for each directional hypothetical routing is calculated based on the current travel time for each segment in OAG data. For hypothetical routings with a connection in LAX, a layover time of 1.5 hours for domestic American to international Qantas or 2 hours for international Qantas to domestic AA is used. For hypothetical routings with a connection in SYD, MEL, or BNE, a layover of 60 minutes for Qantas domestic to domestic is used. These connection times are the Minimum Connection Times required by the QAJB carriers at these airports.
18. The directional hypothetical routing with the shortest travel time is used to calculate the time savings from new nonstop service for each city pair, direction, and season of operation.⁸² The roundtrip time savings are calculated by adding up the time savings for each direction.⁸³
19. The time savings in hours are converted to dollar values using the USDOT's value of travel time savings (VTTS) for air travel.⁸⁴ The USDOT VTTS for air travel (in 2015 USD) is \$36.10/h for personal travel and \$63.20/h for business. The values are NZ\$79.02/h and NZ\$138.33/h, respectively, when converted from 2015 USD to 2024 NZD using the Bureau of Labor Statistics Consumer Price Index (BLS CPI) and the average 2024 USD to NZD exchange rate.⁸⁵
20. Lastly, the dollar value of travel time savings per roundtrip for each city pair and season of operation is multiplied by the number of seasonal passengers that travelled nonstop on the route in 2024 from MIDT data to obtain time savings benefits for each new nonstop route and season for 2024 in NZD.⁸⁶

⁸⁰ Travel time in minutes for each flight segment in Summer 2024 and Winter 2024/25 is based on OAG data.

⁸¹ In Summer 2014-Winter 2014/15, Qantas operated nonstop on LAX-BNE, HNL-SYD, LAX-MEL, and LAX-SYD. While Qantas also operated DFW-SYD (including an inbound leg via BNE) at the time, the route was introduced in May 2011 as a result of the original JBA approval and thus would not exist but-for the QAJB. See Application to the Minister of Transport pursuant to Part 9 of the Civil Aviation Act 1990, Restated Joint Business Agreement and associated Agreements, 12 June 2015, at 8 ("The Original JBA supported the successful launch and subsequent expansion of Qantas' Sydney-Dallas/Fort Worth services. Commencing in May 2011 with an initial four services per week (including an inbound leg via Brisbane), these services have given passengers unprecedented access to destinations across the US.").

⁸² DFW-AKL and LAX-AKL operate during the northern hemisphere winter season only.

⁸³ The shortest hypothetical routings are as follows: DFW-LAX-BNE-AKL for DFW-AKL (both directions), JFK-LAX-BNE-AKL for JFK-AKL (both directions), LAX-BNE-AKL for LAX-AKL (both directions).

⁸⁴ See <https://www.transportation.gov/office-policy/transportation-policy/revised-departmental-guidance-valuation-travel-time-economic>.

⁸⁵ Average USD-NZD exchange rate for 2024 available at <https://www.exchange-rates.org/exchange-rate-history/usd-nzd-2024>.

⁸⁶ All three new nonstop services were in operation for the two summer quarters of 2024 (second and third quarter) and/or the two winter quarters of 2024 (first and fourth quarter).

21. Figure 4 below provides estimated time savings and passengers for each new nonstop service and season of operation in 2024. The seasonal benefits are multiplied by five to obtain the five-year forward looking dollar benefits in NZD for each new nonstop route and season of operation.

Figure 4: Estimated Benefits from Travel Time Savings on QAJB New Nonstop Routes (in NZD)

| City Pair | Season | Estimated Roundtrip Savings (h) | Estimated Time Savings Benefits | | | | | |
|--|--------|---------------------------------|---------------------------------|------------------------|----------------------|-----------------------|-----------------------|------------------------|
| | | | Economy | | Business | | Total | |
| | | | Annual | Five-Year | Annual | Five-Year | Annual | Five-Year |
| Dallas/Fort Worth, TX -- Auckland, New Zealand | W | 17.7 | NZD 6,682,997 | NZD 33,414,985 | NZD 2,153,441 | NZD 10,767,204 | NZD 8,836,438 | NZD 44,182,189 |
| New York City, NY -- Auckland, New Zealand | S | 17.6 | NZD 10,550,707 | NZD 52,753,534 | NZD 2,062,608 | NZD 10,313,040 | NZD 12,613,315 | NZD 63,066,574 |
| New York City, NY -- Auckland, New Zealand | W | 18.3 | NZD 11,719,932 | NZD 58,599,659 | NZD 3,340,492 | NZD 16,702,458 | NZD 15,060,423 | NZD 75,302,117 |
| Los Angeles, CA -- Auckland, New Zealand | W | 11.3 | NZD 9,415,432 | NZD 47,077,159 | NZD 1,957,730 | NZD 9,788,650 | NZD 11,373,162 | NZD 56,865,809 |
| New Zealand Total New Nonstop Benefits | | | NZD 38,369,068 | NZD 191,845,338 | NZD 9,514,270 | NZD 47,571,351 | NZD 47,883,338 | NZD 239,416,689 |

Sources: MIDT through 2024 Q4, DOT T100 International Segment Data, DOT International O&D Survey, <https://www.exchange-rates.org/exchange-rate-history/usd-nzd-2024>.

Additional benefits from reduction in number of connections

22. Several academic papers recognise that connecting service is associated with additional inconvenience (beyond the added travel time) such as disembarking and reboarding, traveling from arrival gate to departure gate for the connecting flight, going through immigration, and rechecking bags.
23. For example, Adler et al. (2005) quantify the willingness to pay to eliminate a connection in addition to the value of travel time savings.⁸⁷ The paper is based on a survey of 600 individuals who flew domestic US up to 12 months before May 2001. The estimated VTTS is \$31.20/h for personal travel and \$69.70/h for business travel, or NZ\$89.98/h and NZ\$201.02/h, respectively, after converting to 2024 NZD using the BLS CPI and average 2024 USD to NZD exchange rate.⁸⁸ The estimated willingness to pay to avoid an additional connection is \$18.80 for personal and \$53.70 for business travel, or NZ\$54.22 and NZ\$154.88, respectively, after converting to 2024 NZD.
24. The benefits from travel time savings are calculated using the same roundtrip travel time savings as above, but the conversion to dollar values is based on Adler et al.'s estimated VTTS, for consistency. The benefits from elimination of connections are calculated by multiplying the number of roundtrip connections for the shortest hypothetical routing by the willingness to pay to eliminate a connection. The total value of roundtrip savings from travel time savings and elimination of connections is multiplied by the number of seasonal passengers on each route in 2024 from MIDT to obtain dollar benefits for 2024 in NZD.
25. Figure 5 below provides estimated time savings, eliminated connections, and passengers for each new nonstop service by season for 2024. The seasonal benefits are multiplied by five to obtain

⁸⁷ Thomas Adler, C. Stacey Falzarano, and Gregory Spitz, "Modeling Service Trade-Offs in Air Itinerary Choice," Transportation Research Record, No. 1915 (2005), 20-26. See also Valdemar Warburg, Chandra Bhat, and Thomas Adler, "Modeling demographic and unobserved heterogeneity in air passengers' sensitivity to service attributes in itinerary choice," Transportation Research Record, No. 1951 (2006), 7-16. (the paper focuses on business travel only and estimates VTTS between \$61.95 and \$72.27 in 2024 USD and willingness to pay for nonstop versus connecting between \$118.74 and \$130.78 in 2024 USD); See also Raúl Brey and Joan L. Walker, "Latent temporal preferences: An application to airline travel," Transportation Research Part A, Vol. 45 (2011), 880-895 (the paper focuses on leisure travellers and estimates VTTS of 6.4% of fare and willingness to pay 9.33% of fare to eliminate a connection (beyond travel time savings). The authors further estimate willingness to pay 1.33% of fare to avoid changing an airline (beyond elimination of connection and travel time savings).

⁸⁸ Average USD-NZD exchange rate for 2024 available at <https://www.exchange-rates.org/exchange-rate-history/usd-nzd-2024>.

the five-year forward looking dollar benefits in NZD for each new nonstop route and season of operation.

Figure 5: Estimated Benefits from Travel Time Savings and Elimination of Connection on New QAJB Nonstop Routes (in NZD)

| City Pair | Season | Estimated Roundtrip Savings | | Estimated Total Benefit | | | | | |
|--|--------|-----------------------------|---------------|-------------------------|------------------------|-----------------------|-----------------------|-----------------------|------------------------|
| | | Travel time (h) | # Connections | Economy | | Business | | Total | |
| | | | | Annual | Five-Year | Annual | Five-Year | Annual | Five-Year |
| Dallas/Fort Worth, TX -- Auckland, New Zealand | W | 17.7 | 4 | NZD 8,650,060 | NZD 43,250,300 | NZD 3,675,777 | NZD 18,378,886 | NZD 12,325,837 | NZD 61,629,186 |
| New York City, NY -- Auckland, New Zealand | S | 17.6 | 4 | NZD 13,662,407 | NZD 68,312,033 | NZD 3,522,716 | NZD 17,613,580 | NZD 17,185,123 | NZD 85,925,613 |
| New York City, NY -- Auckland, New Zealand | W | 18.3 | 4 | NZD 15,108,028 | NZD 75,540,139 | NZD 5,673,378 | NZD 28,366,891 | NZD 20,781,406 | NZD 103,907,030 |
| Los Angeles, CA -- Auckland, New Zealand | W | 11.3 | 2 | NZD 11,871,129 | NZD 59,355,643 | NZD 3,234,636 | NZD 16,173,180 | NZD 15,105,764 | NZD 75,528,822 |
| New Zealand Total New Nonstop Benefits | | | | NZD 49,291,623 | NZD 246,458,115 | NZD 16,106,507 | NZD 80,532,537 | NZD 65,398,130 | NZD 326,990,651 |

Sources: MIDT, OAG, <https://www.exchange-rates.org/exchange-rate-history/usd-nzd-2024>

Benefits from the elimination of double marginalisation

26. As mentioned in Section “*Elimination of Double Marginalisation*” of the submission, the CEI Update showed that the double marginalisation conclusions from the CEI Study continue to hold when updated with data through the end of the second quarter of 2018. In particular, the study showed that JVs (like the QAJB) lead to large reductions in fares on connecting itineraries relative to interline fares or other lesser forms of cooperation.⁸⁹
27. To convert these fare reductions into consumer welfare gains, in dollars, one should not simply multiply the fare reduction by the number of passengers flying connecting itineraries, as this would overstate consumer benefits, by failing to account for the fact that new passengers, attracted only by the lower fare, value the trip by less than the pre-QAJB fare (as indicated by the fact that they would not have flown at the pre-QAJB price). As explained above, one needs to compute the area under the demand curve (and above price), both with and without the double marginalisation savings, then compute the increase in consumer welfare as the increased area under the demand curve with the double marginalisation savings in place (the shaded area in Figure 2, above).
28. Starting from the same demand curve as above, and calibrating b using the same elasticity of demand estimate from Berry and Jia (2010), one can rearrange the equation to determine the parameter a value from the following equation, using 2024 QAJB passengers and fares on mixed-metal QAJB itineraries determine q_{post} and p_{post} based on current condition:

$$e^a = q_{post} p_{post}^b$$

29. Given the above, total consumer benefit from reduction in interline-QAJB fares can be expressed as:

$$q_{post} p_{post} \frac{(1 + DM)^{1-b} - 1}{1 - b}$$

30. Using this method, the “adjusted” double marginalization benefits can be computed, accounting for the smaller benefits to new passengers, as described above. These adjusted benefits are 8.4% for mixed-metal QAJB passengers using the CEI Update estimated JV effect.⁹⁰ To convert

⁸⁹ Robert J. Calzaretta, Yair Eilat and Mark A. Israel, “Competitive Effects of Airline Cooperation,” Journal of Competition Law & Economics, Vol. 13, No. 3, September 2017, 501–548. (Table 4 provides the estimated connecting fare effects of joint ventures, as well as alliances and ATIs, both of which are estimated to have smaller fare reductions of 4.5% and 5.6%, respectively, relative to pure interline). “Compass Lexecon CEI Study Update,” Competition and Markets Authority, United Kingdom, April 1, 2019 (Table 4 estimates a reduction of 8.4% for JV connecting fares relative to pure interline).

⁹⁰ In particular, the CEI Update reports the JV effect in terms of the pre-period price ($\exp(\text{coef}) - 1$, see Table 4 of the CEI Update). To reflect the fare effect in terms of the post-period price, the reported effect is converted using the formula $\frac{1}{1 - 0.084} - 1 = 9.2\%$, i.e., the pre-JV fares are 9.2% than the post-JV fares (in terms of post-JV fares). This DM effect is used in the formula to calculate the adjustment term $\frac{(1 + DM)^{1-b} - 1}{1 - b} = 8.36\%$.

these percentages into dollars on each connecting route, the percentage is multiplied by the average mixed-metal QAJB fare on the route using the most recent year of available data (2024) from the USDOT's International Origin and Destination Survey database. Average per-passenger benefits are converted into annual 2024 dollars by multiplying the average fare reductions by the annual mixed-metal QAJB passengers on the route from MIDT. For routes that are missing fare information for 2024 in the DOT International Origin and Destination Survey, the percentages are converted to dollars by using the average QAJB mixed-metal fare across all US-NZ city pairs in 2024. The annual 2024 mixed-metal revenue and benefits are converted to NZD and multiplied by five to obtain the five-year forward looking QAJB mixed-metal revenue and dollar benefits in NZD, provided in Figure 6 below.⁹¹

Figure 6: Estimated Benefits from the Elimination of Double Marginalisation on QAJB New Zealand-US Mixed-Metal Itineraries (in NZD)

| Country | QAJB mixed-metal revenue | | Estimated benefits | |
|-------------|--------------------------|-----------------|--------------------|----------------|
| | Annual | Five-Year | Annual | Five-Year |
| New Zealand | NZD 30,743,237 | NZD 153,716,187 | NZD 2,571,301 | NZD 12,856,505 |

Source: DOT International O&D Survey, MIDT, CEI Study, <https://www.exchange-rates.org/exchange-rate-history/usd-nzd-2024>

⁹¹ The revenue and benefits are converted to NZD using the average 2024 USD-NZD exchange rate (1 USD = 1.6538 NZD) (available at <https://www.exchange-rates.org/exchange-rate-history/usd-nzd-2024>).