

EMIRATES in SOUTH AFRICA

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DUBAI ✈

✈ JOHANNESBURG, CAPE TOWN AND DURBAN



49

WEEKLY



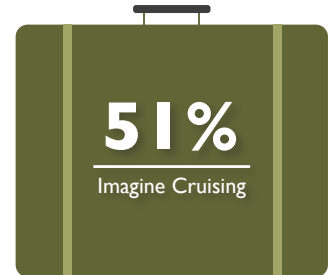
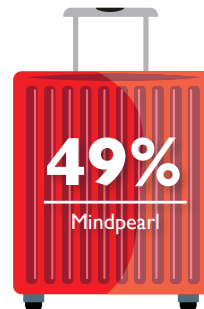
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Emirates is the largest long-haul carrier in South Africa measured by number of seats. Emirates services 49 weekly passenger flights to South Africa along with two weekly all-cargo flights.

Since commencing operations in 1995, Emirates has carried over **11.9 million** passengers and **586,466 tonnes** of cargo to and from South Africa.

Emirates' operations in South Africa consist of:

- Emirates airline passenger operations and SkyCargo freight operations;
- a 50% share in **dnata Newrest**, an inflight catering services operation serving airports in Johannesburg and Cape Town;
- a 49% share in **Mindpearl**, an outsourcing and call centre operation based in Cape Town; and
- a 51% stake in travel services provider, **Imagine Cruising**.



Connectivity benefits

Emirates has one of the largest route networks of any airline serving South Africa, and flies 388 routes to

- Johannesburg O.R. Tambo
- Cape Town International
- Durban King Shaka International

JNB:	131 routes
CPT:	129 routes
DUR:	128 routes
	388

In **2014**, Emirates transported about **1.2 million** passengers to and from South Africa.

Emirates routes to and from South Africa

Abidjan	Brussels	Entebbe	Kozhikode	Moscow	Seoul
Abuja	Budapest	Erbil	Kuala Lumpur	Mumbai	Seychelles
Accra	Buenos Aires	Frankfurt	Kuwait	Munich	Shanghai
Addis Ababa	Cairo	Geneva	Lagos	Muscat	Sialkot
Adelaide	Casablanca	Glasgow	Lahore	Nairobi	Singapore
Ahmedabad	Chennai	Guangzhou	Larnaca	New York	St. Petersburg
Algiers	Chicago	Hamburg	Lisbon	Newcastle	Stockholm
Amman	Christchurch	Harare	London Gatwick	Nice	Sydney
Amsterdam	Clark	Ho Chi Minh City	London Heathrow	Osaka	Taipei
Athens	Colombo	Hong Kong	Los Angeles	Oslo	Tehran
Auckland	Conakry	Houston	Luanda	Paris	Thiruvananthapuram
Baghdad	Copenhagen	Hyderabad	Lusaka**	Perth	Tokyo Haneda
Bahrain	Dakar	Islamabad	Lyon	Peshawar	Tokyo Narita
Bangkok	Dallas	Istanbul	Madrid	Phuket	Toronto
Barcelona	Dammam	Jakarta	Male	Prague	Tripoli
Basra	Dar es Salaam	Jeddah	Malta	Rio de Janeiro	Tunis
Beijing	Delhi	Kabul	Manchester	Riyadh	Venice
Beirut	Dhaka	Karachi	Manila	Rome	Vienna
Bengaluru	Doha	Khartoum	Mauritius*	San Francisco	Warsaw
Birmingham	Dublin	Kiev	Medinah	Sana'a	Washington DC
Boston	Dubai	Kochi	Melbourne	Sao Paulo	Zurich
Brisbane	Dusseldorf	Kolkata	Milan	Seattle	

Source: Emirates (2015); * not to Durban; ** not to Durban or Cape Town

Contribution to tourism

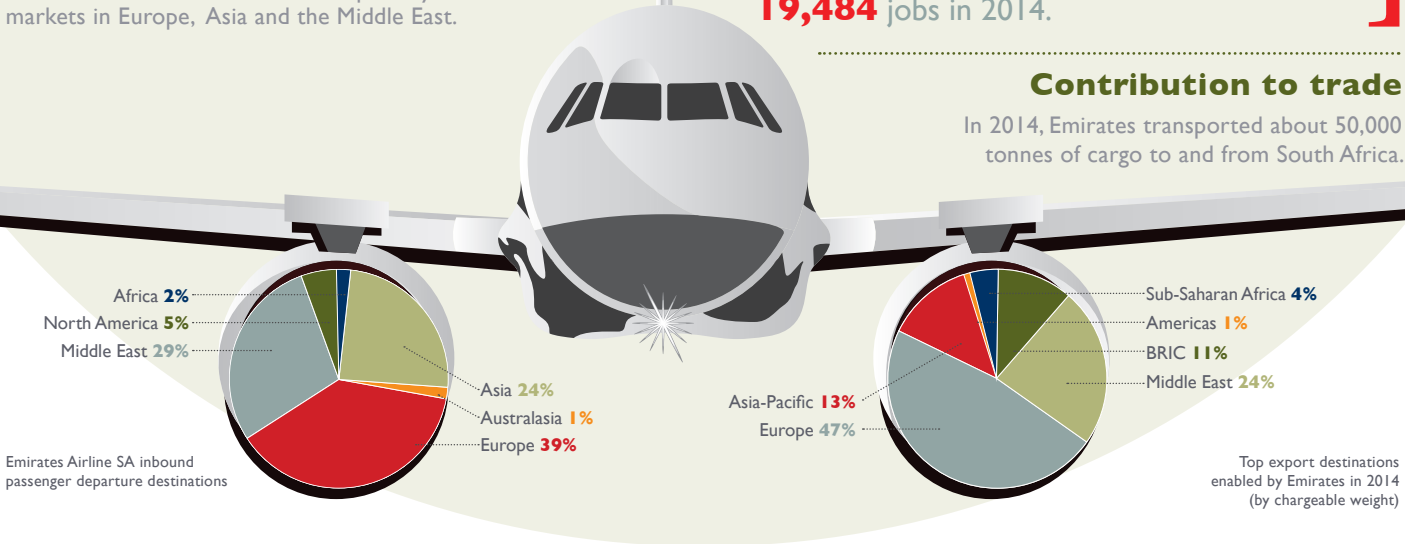
In 2014, Emirates carried approximately 325,661 inbound tourists, 13% of foreign air tourist arrivals.

Most Emirates tourists came from priority tourism markets in Europe, Asia and the Middle East.

It is estimated that tourists arriving with Emirates generated economic value (direct, indirect, and induced) of **ZAR5.2 billion**, and supported **19,484 jobs** in 2014.

Contribution to trade

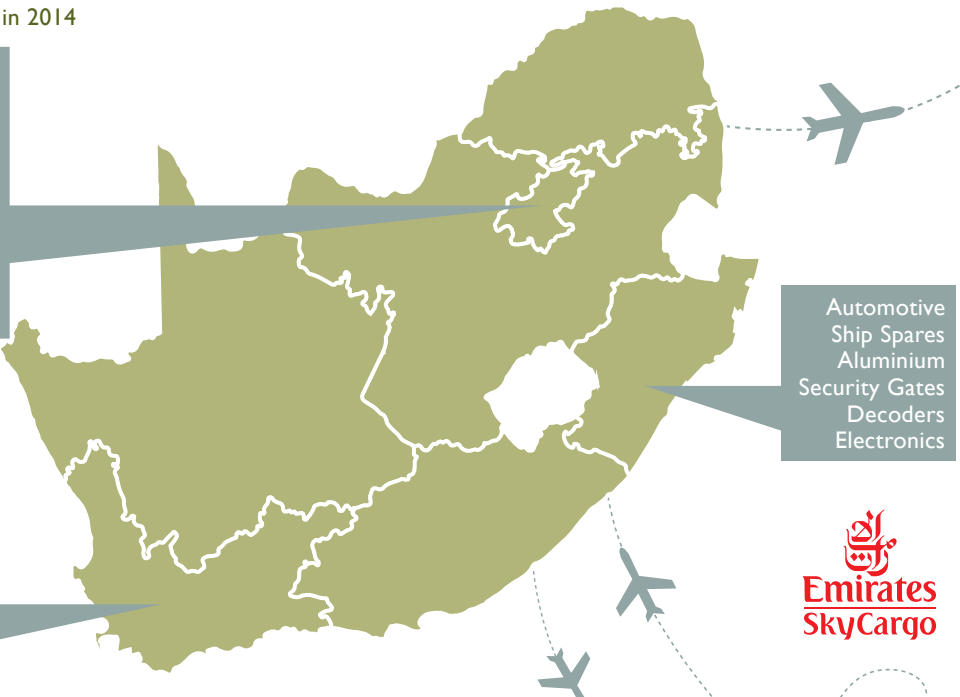
In 2014, Emirates transported about 50,000 tonnes of cargo to and from South Africa.



Top Emirates export commodities per port in 2014

- Fish
- Live Lobsters, Crabs and Oysters
- Fruits
- Flowers
- Vegetables
- Chilled Meat
- Automotive
- Electronics (mainly Cell Phones)
- Precious Metals (Gold/Diamonds)
- Vehicles

- Meat/Garlic/Spices/Meat Patties
- Cheese
- Fruit and Vegetables
- Personal Effects
- Ship Spares/Aircraft Spares
- Digital Ink
- Garments
- Courier Material
- Parasols
- Wine



Contribution to business



13% of all business tourists

In 2014, Emirates carried approximately 12,000 business tourists to South Africa, about 13% of all business tourists arriving in that year.

Unique connectivity

- ✈ Of the **388** possible routes, **366** were analysed.¹ On these routes the performance of Emirates was benchmarked to a comparator - the airline offering the most frequent service on that route.
- ✈ **80** out of **366** routes were completely unique one stop connections (the alternative would require a passenger to have two lay-overs, not only one).
- ✈ **78** of these were to Durban King Shaka International - Emirates was the only international airline flying to Durban King Shaka International.

Emirates is thus **particularly important** in linking **Durban**, a central trade and tourism hub, to the rest of the **world**.

Travel time and ticket fare competitiveness

Emirates offered the best combination of travel time *and* ticket fare on **251** out of **366** routes (69%).

- ✈ Emirates was especially competitive on time and price for routes from **Western Europe**, **Eastern and Central Europe**, **North East Asia**, **North America**, and **South America**.
- ✈ These include eight of South Africa's top ten tourist sending countries in 2014, as well as the important emerging tourism market of China.

Emirates is an important competitive link connecting the most important tourist markets to **South Africa** as well as to the **BRIC** (Brazil, Russia, India, China) countries.

Regional competitive analysis

It is estimated that without Emirates services in 2014 South Africa would have suffered a loss of **140,347** inbound tourists, equivalent to about **5%** of foreign air tourist arrivals.

This would amount to a total loss to the economy (direct, indirect and induced) of **ZAR2.3 billion** and about **8,713** jobs.



¹ Data was not available for all 388 routes.

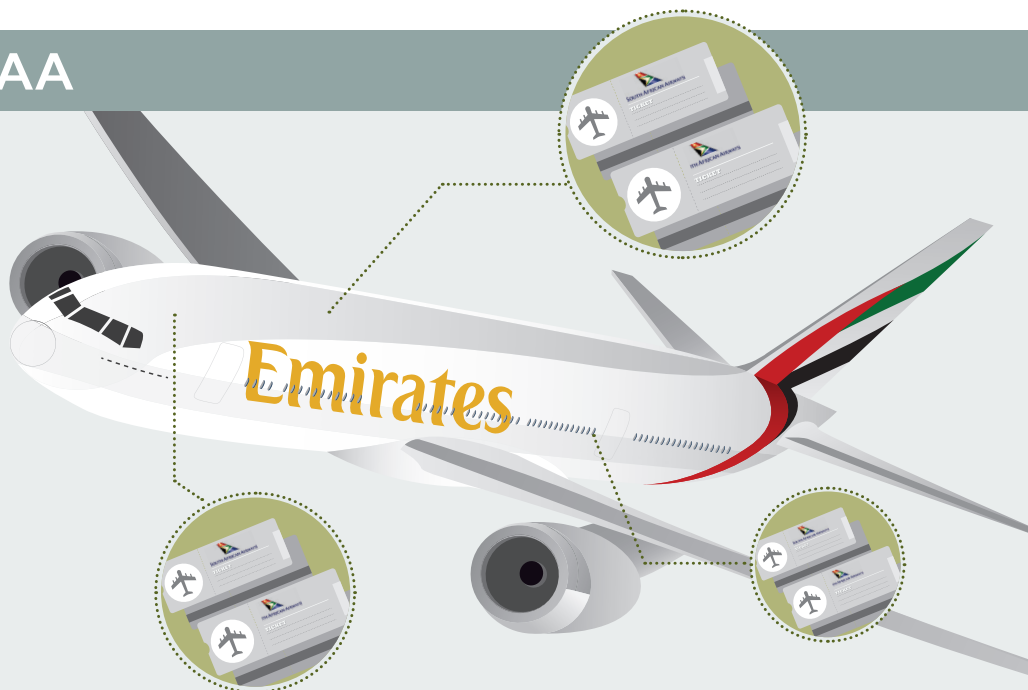


Partnership with SAA

Codeshare

Emirates and SAA have had a code-share agreement in place since 1997. This allows SAA to market and sell seats on Emirates planes and routes.

To date, Emirates has sold nearly 600,000 seats to SAA to on-sell to the market. In 2014, SAA had access to about 54,000 codeshare seats on Emirates flights.



Interline passengers

Emirates and SAA also have an interline agreement in place - an agreement to transport passengers and cargo on routes that otherwise would require multiple airlines and separate ticketing.

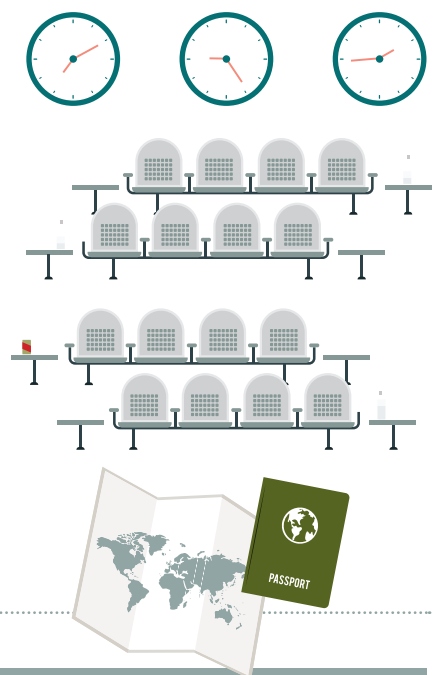
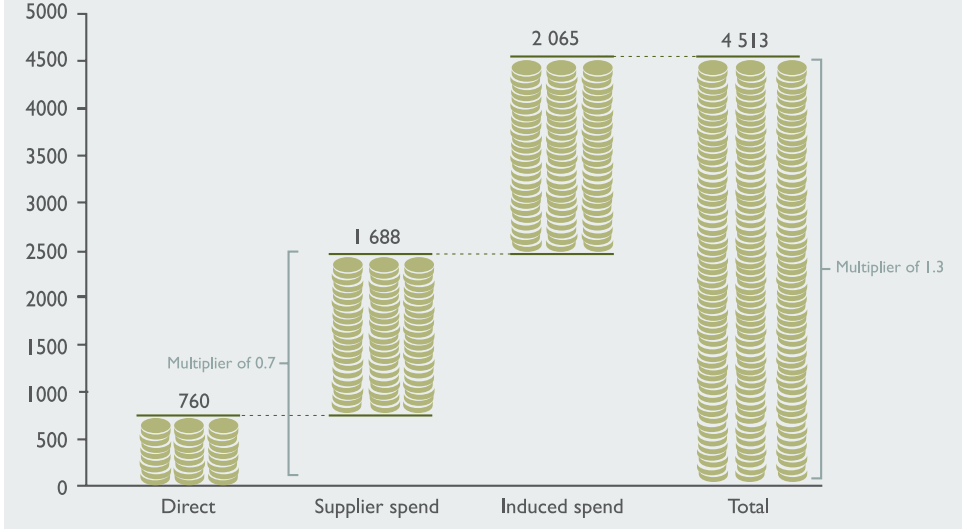
In 2014, more than **50,000** inbound passengers transferred from an Emirates flight to an SAA flight for onwards travel domestically or to the region, especially to Mozambique and Botswana. More than **57,000** outbound passengers transferred from a SAA flight to an Emirates flight for onward travel to Dubai.

Footprint contribution

Contribution to GDP

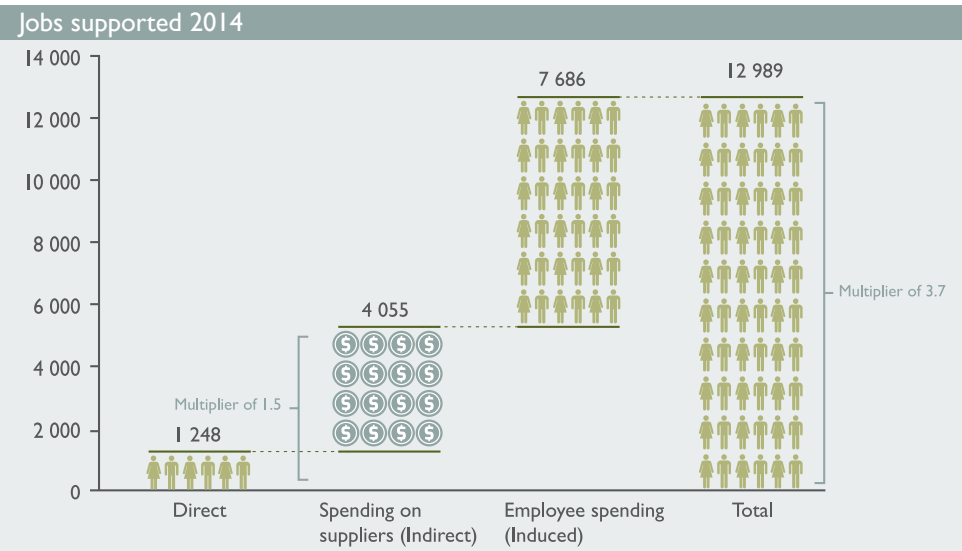
Emirates immediate economic activities generated **ZAR4.5 billion** of value to GDP, the equivalent of **7%** of the direct, indirect and induced impact of the aviation sector (ZAR62 billion – 2009 figures)

Contribution to GDP 2014 (R million)



Source: Emirates (2015), analysis by Genesis Analytics (2015)
 Note: Multipliers are expressed as GVA per unit of Emirates Operational Expenditure.

Contribution to employment



Through the direct, indirect and induced impact of core operations, Emirates supported **12,989** jobs, approximately **6%** of aviation sector employment (2009 data)

Note: Multipliers are expressed as GVA over Emirates Operational Expenditure.

Training



attended 197 training events

In 2014, Emirates paid skills development levies to Culture, Arts, Tourism, Hospitality and Sport Sector Skills Education Training Authority (CATHSSETA) and 92 of the company's 147 staff members attended a total of 197 training events.

Emirates provided an internship programme, "Work Integrated Learning" for unemployed students from Further Education and Training colleges.

Corporate Social Investment (CSI)

Emirates Airline Foundation

Supports two NPOs in South Africa, Singakwenza Education and Health, and Fikelela Children's Centre.

dnata4good

Supports wildlife preservation volunteer organisations in South Africa including "Saving the Survivors" and "Rhino Revolution".



Sponsorships

Emirates recently entered into a five-year partnership to sponsor the Johannesburg-based The Lions rugby team now known as the **Emirates Lions**.

