COSTA DEL SOL MÁLAGA

Informe sobre la capacidad de asientos ofertados en los próximos meses hasta el aeropuerto de Málaga – Costa del Sol

diciembre 2017 – mayo 2018

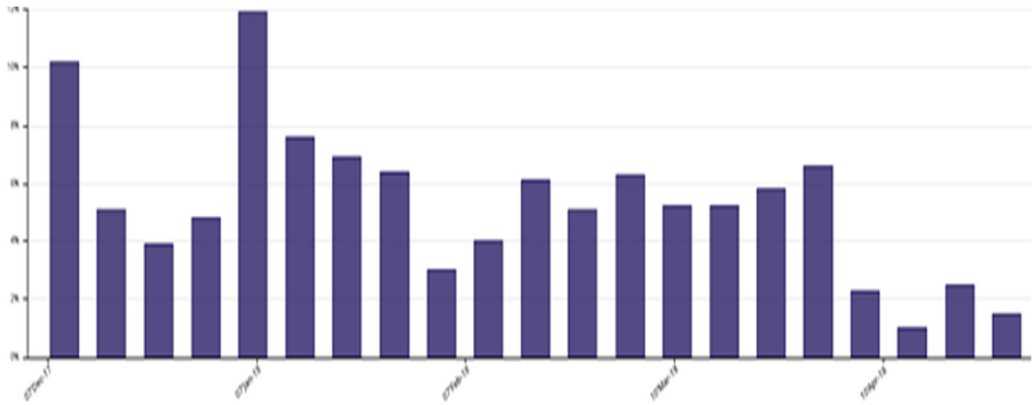
Siguiendo con la línea de estudios mensuales referidos a la previsión de la oferta de “asientos de avión” ofrecida hacia la Costa del Sol, adjunto informamos de las previsiones a seis meses de oferta global en la emisión de turistas hacia nuestra Provincia, a nivel general, por países, ciudades de origen, aeropuertos, líneas aéreas, etc., a partir de diciembre.

Como ya sabéis, estos análisis los podemos realizar para el mercado, ciudad, línea aérea de la que estéis interesados/as, por lo que quedamos a vuestra disposición para suministraros la información que necesitéis.

Las principales conclusiones generales del periodo diciembre 2017 – mayo 2018, son:

1. **En todas las semanas de los próximos cinco meses se prevé un incremento del número de plazas ofertadas** hacia el aeropuerto de Málaga-Costa del Sol.

2. Se estima que el **crecimiento acumulando de las llegadas de pasajeros al aeropuerto de Málaga en los próximos meses será de un 4,9 %.**



3. Se observa cómo se produce una disminución en el crecimiento a partir de abril de **2018, con aumentos medios de menos del 2%.**

4. Se **estima que el principal mercado emisor extranjero, Reino Unido, tendrá una disminución del 11,2% sobre el mismo periodo del año anterior**. Todos los demás mercados de importancia para la Costa del Sol suben en sus previsiones de llegadas al aeropuerto de Málaga.

5. Destaca el **gran crecimiento** en la oferta de plazas aéreas en los próximos meses procedentes de **Alemania** (+26,7%), **Finlandia** (+23,1%), **Polonia** (+19,5%), **Holanda** (+17%), **Dinamarca** (+17%) y **de los propios aeropuertos nacionales** (+15,6%).

United Kingdom/GB	875 389	986 311	-11.2%
Spain/ES	587 699	508 607	+15.6%
Germany/DE	329 263	259 923	+26.7%
Netherlands/NL	195 598	167 227	+17.0%
France/FR	190 287	190 049	+0.1%
Denmark/DK	150 673	128 756	+17.0%
Belgium/BE	140 690	138 305	+1.7%
Italy/IT	125 794	123 108	+2.2%
Sweden/SE	122 838	115 632	+6.2%
Ireland/IE	116 992	112 963	+3.6%
Norway/NO	91 818	88 739	+3.5%
Switzerland/CH	79 379	75 132	+5.7%
Finland/FI	66 950	54 390	+23.1%
Russia/RU	33 496	33 180	+1.0%
Poland/PL	31 908	26 700	+19.5%
Others	185 648	158 808	+16.9%
Leg Origin (selected)	3 324 422	3 167 830	+4.9%
Total Seats	3 324 422	3 167 830	+4.9%

6. Otros mercados que tienen previsto un **incremento** en la oferta de plazas aéreas hacia la Provincia de Málaga son **Suecia, Suiza e Irlanda,** aunque con leves aumentos.

7. Destacar la **significativa disminución cuantitativa del mercado británico**, ya que se ha pasado de unos incrementos de dos dígitos en los últimos meses, a una previsión de bajada de **unas 111.000 llegadas menos para los próximos meses.**

8. En cuanto a la variación de la oferta de plazas por **líneas aéreas,** destacar los **grandes crecimientos** que tienen previsto operar hacia el aeropuerto de Málaga de **Niki** (+416 %, de 14.580 a 75.247), **Jet2.com** (+40,7 %), **British Airways** (+29%), **Jetairfly** (+22,8%), **Iberia** (11,6%), **Ryanair** (11,1%) y **Vueling** +10%).

9. Se observa como la principal línea aérea que opera en el aeropuerto de Málaga, **Ryanair**, sigue creciendo en número de pasajeros, con un aumento cuantitativo de 84.000 plazas más que en el mismo periodo del año anterior.

FR: Ryanair (Ireland,LCC)	842 373	758 079	+11.1%
VY: Vueling (Spain,LCC)	397 812	361 564	+10.0%
U2: EasyJet (United Kingdom,LC	383 028	363 300	+5.4%
D8: Norwegian Air Internationa	276 567	271 746	+1.8%
UX: Air Europa Lineas Aereas (S	150 490	149 628	+0.6%
IB: Iberia (Spain)	125 005	112 014	+11.6%
LS: Jet2.com (United Kingdom,L	116 932	83 124	+40.7%
HV: Transavia (Netherlands,LCC	112 236	107 494	+4.4%
SK: SAS (Sweden)	84 945	83 063	+2.3%
HG: Niki (Austria,LCC)	75 247	14 580	+416.1%
BA: British Airways (United King	69 525	53 891	+29.0%
EI: Aer Lingus (Ireland,LCC)	61 600	63 706	-3.3%
TB: Jetairfly (Belgium,LCC)	55 774	45 419	+22.8%
BY: Thomson Airways (United K	47 844	53 750	-11.0%
LX: Swiss International Air Lines	46 235	47 352	-2.4%
Others	478 809	599 120	-20.1%
Airlines (selected)	3 324 422	3 167 830	+4.9%
Total Seats	3 324 422	3 167 830	+4.9%

A nivel cuantitativo, cabe señalar los importantes crecimientos en la llegada de un mayor número de viajeros operado por Niki (+ 60.000), **Vueling** (+ 36.000) y **Jet2.com** (+ 33.000).

10. **Las líneas que han cesado su actividad con destino al aeropuerto de Málaga** en enero de 2018, son la siguientes:

Airline	Route	Origin Country	Origin Airport
Monarch Airlines	BHX-AGP	United Kingdom	BHX - Birmingham (GB)
	LBA-AGP	United Kingdom	LBA - Leeds (GB)
	LGW-AGP	United Kingdom	LGW - London (GB)
	MAN-AGP	United Kingdom	MAN - Manchester (GB)
	LTN-AGP	United Kingdom	LTN - London (GB)
Germanwings	STR-AGP	Germany	STR - Stuttgart (DE)
Air Berlin	STR-AGP	Germany	STR - Stuttgart (DE)
	CGN-AGP	Germany	CGN - Bonn (DE)
	TXL-AGP	Germany	TXL - Berlin (DE)
	DUS-AGP	Germany	DUS - Duesseldorf (DE)
	MUC-AGP	Germany	MUC - Munich (DE)

11. A nivel de oferta de plazas por ciudad de origen, se observa claramente como **desde los cuatro principales puntos de emisión de turistas hacia la Costa del Sol**, **se van a ver aumentados el número de asientos de avión para los próximos seis meses**, (***excepto desde, Londres Gatwick,*** con un descenso del 13,7%), con respecto a la oferta del mismo periodo del año anterior.

    Destacan los **grandes crecimientos**, de más de un 20%, de la oferta de plazas aéreas procedente de **Londres Stansted** (+36.8%) **Ámsterdam** (+ 30,3%)**, Helsinki** (+ 23,5%) y **Barcelona** (+ 19,5%).

    Otros puntos de emisión en los que se prevé un incremento de viajeros de más del 5 % hacia el aeropuerto de Málaga Costa del Sol, con respecto al mismo periodo del año pasado son **Madrid y Copenhague-Kastrup.**

LGW · AGP	165 205	191 368	-13.7%
BCN · AGP	161 877	135 513	+19.5%
CPH · AGP	117 362	106 016	+10.7%
AMS · AGP	109 662	84 150	+30.3%
STN · AGP	98 922	72 327	+36.8%
BRU · AGP	94 669	101 306	-6.6%
CDG · AGP	93 985	94 200	-0.2%
MAD · AGP	90 291	78 406	+15.2%
DUB · AGP	84 868	82 639	+2.7%
MAN · AGP	82 087	129 090	-36.4%
ARN · AGP	80 603	78 590	+2.6%
FCO · AGP	68 206	69 274	-1.5%
HEL · AGP	66 105	53 545	+23.5%
MLN · AGP	63 744	66 384	-4.0%
OSL · AGP	63 681	63 929	-0.4%
Others	1 883 155	1 761 093	+6.9%
Direct Routes (selected)	3 324 422	3 167 830	+4.9%
Total Seats	3 324 422	3 167 830	+4.9%

12. En cuanto a la franja horaria, se observa un **crecimiento importante en las reservas de llegadas** de 6:00 a 9:00 h y de 17:00 a 18:00 horas.

13. Por último, señalar que se observa un crecimiento menor en la previsión de la oferta de asientos en la **clase Económica (+4,5%)** que en la clase **Business (+10,1 %).**

Málaga, 11 de diciembre de 2017

COSTA DEL SOL MÁLAGA

GRÁFICOS

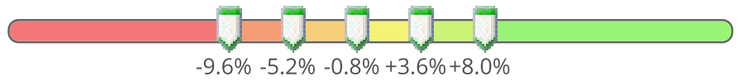
Previsión de asientos ofertados en los próximos meses hasta el aeropuerto de Málaga – Costa del Sol

diciembre 2017 – mayo 2018

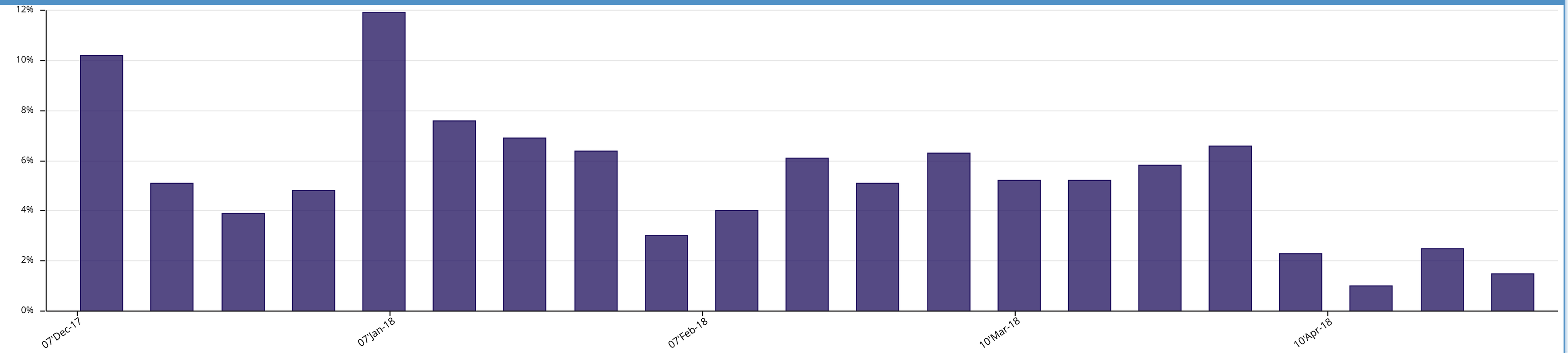
Analysis: **Capacity** Leg Origin: **All selected**

Weekly	Dec 2017	Jan 2018	Feb 2018	Mar 2018	Apr 2018	May 2018
Week 1	6 to 12	27 to 2	31 to 6	28 to 6	28 to 3	25 to 1
Week 2	13 to 19	3 to 9	7 to 13	7 to 13	4 to 10	
Week 3	20 to 26	10 to 16	14 to 20	14 to 20	11 to 17	
Week 4		17 to 23	21 to 27	21 to 27	18 to 24	
Week 5		24 to 30				

Variations Y0 vs. Y-1:



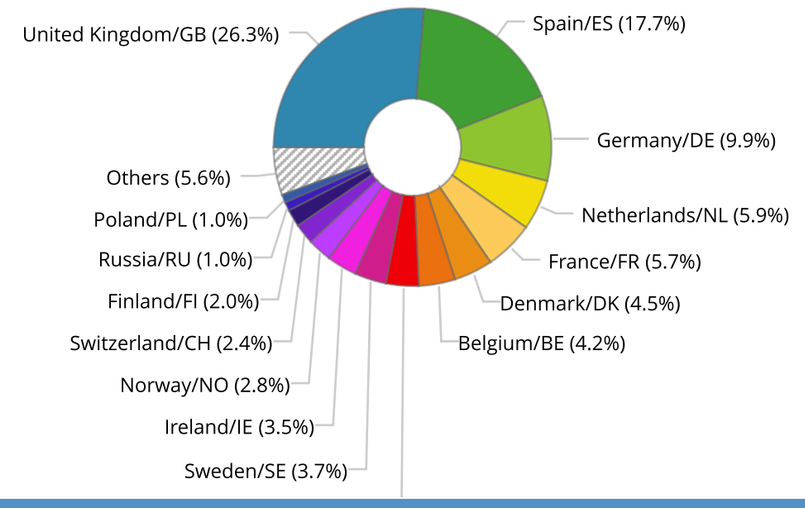
Variation vs. previous period



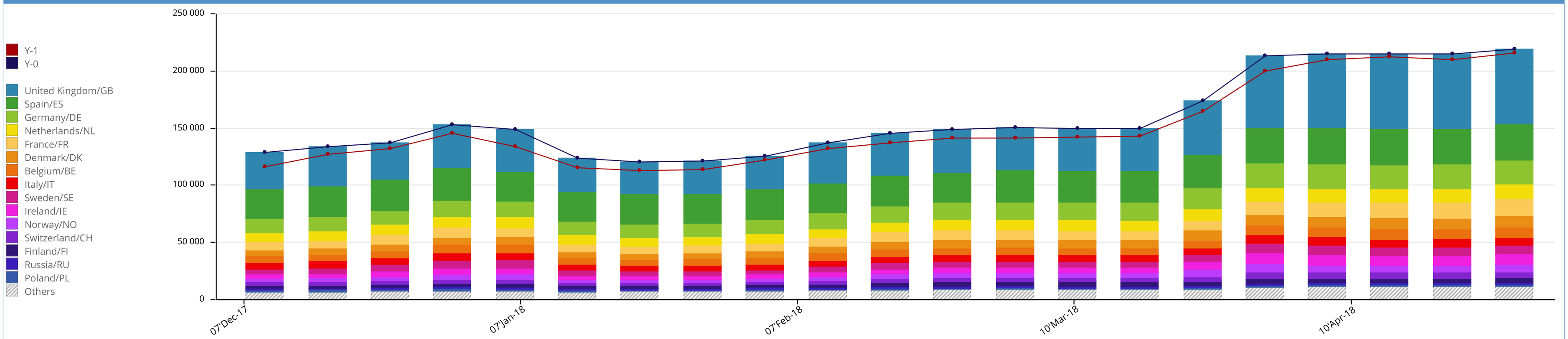
Capacity | Evolution | Full list | **By Seats** | Leg Origin: **All selected** | Segmented by: **Leg Origin** | Airlines: **All airlines**

LEG ORIGIN	Year 0	Year -1	VAR% Y0 vs Y-1
United Kingdom/GB	875 389	986 311	-11.2%
Spain/ES	587 699	508 607	+15.6%
Germany/DE	329 263	259 923	+26.7%
Netherlands/NL	195 598	167 227	+17.0%
France/FR	190 287	190 049	+0.1%
Denmark/DK	150 673	128 756	+17.0%
Belgium/BE	140 690	138 305	+1.7%
Italy/IT	125 794	123 108	+2.2%
Sweden/SE	122 838	115 632	+6.2%
Ireland/IE	116 992	112 963	+3.6%
Norway/NO	91 818	88 739	+3.5%
Switzerland/CH	79 379	75 132	+5.7%
Finland/FI	66 950	54 390	+23.1%
Russia/RU	33 496	33 180	+1.0%
Poland/PL	31 908	26 700	+19.5%
Others	185 648	158 808	+16.9%
Leg Origin (selected)	3 324 422	3 167 830	+4.9%
Total Seats	3 324 422	3 167 830	+4.9%

Share Y0



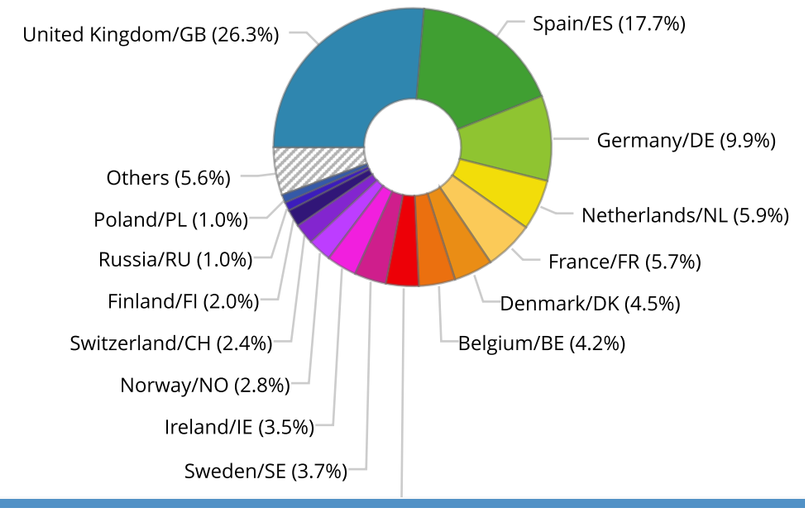
Wed, 06-Dec-2017 to Tue, 01-May-2018



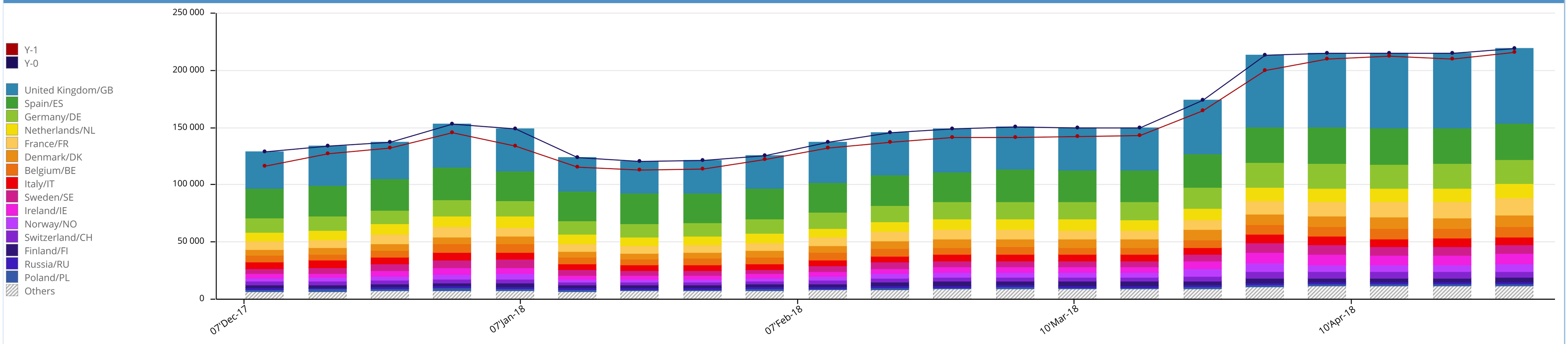
Capacity | Evolution | Full list | **By Seats** | Leg Origin: **All selected** | Segmented by: **Flight Origin** | Airlines:

FLIGHT ORIGIN	Year 0	Year -1	VAR% Y0 vs Y-1
United Kingdom/GB	875 389	986 689	-11.3%
Spain/ES	587 699	508 607	+15.6%
Germany/DE	329 263	259 923	+26.7%
Netherlands/NL	195 598	167 227	+17.0%
France/FR	190 287	190 049	+0.1%
Denmark/DK	150 673	128 756	+17.0%
Belgium/BE	140 690	138 305	+1.7%
Italy/IT	125 794	123 108	+2.2%
Sweden/SE	122 838	115 632	+6.2%
Ireland/IE	116 992	112 963	+3.6%
Norway/NO	91 818	88 739	+3.5%
Switzerland/CH	79 379	75 132	+5.7%
Finland/FI	66 950	54 390	+23.1%
Russia/RU	33 496	33 180	+1.0%
Poland/PL	31 908	26 700	+19.5%
Others	185 648	158 430	+17.2%
Flight origin (selected)	3 324 422	3 167 830	+4.9%
Total Seats	3 324 422	3 167 830	+4.9%

Share Y0

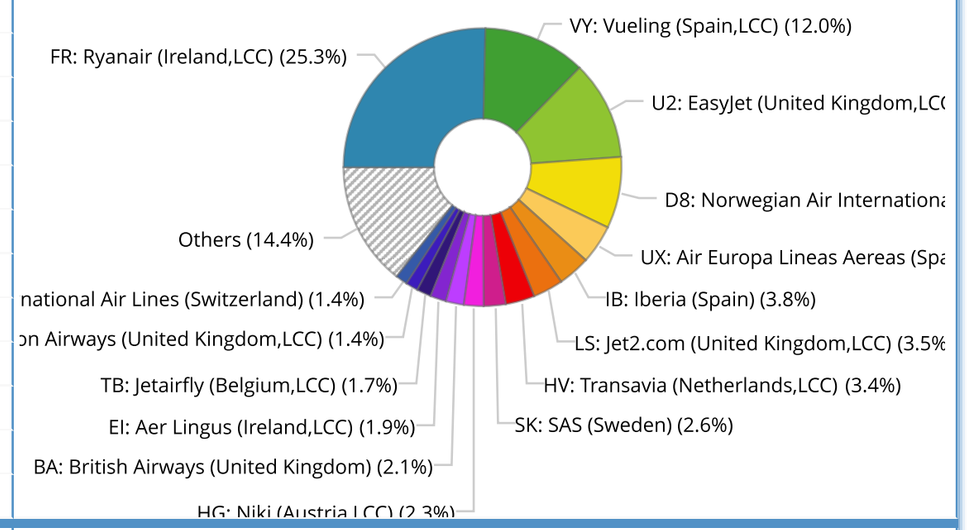


Wed, 06-Dec-2017 to Tue, 01-May-2018

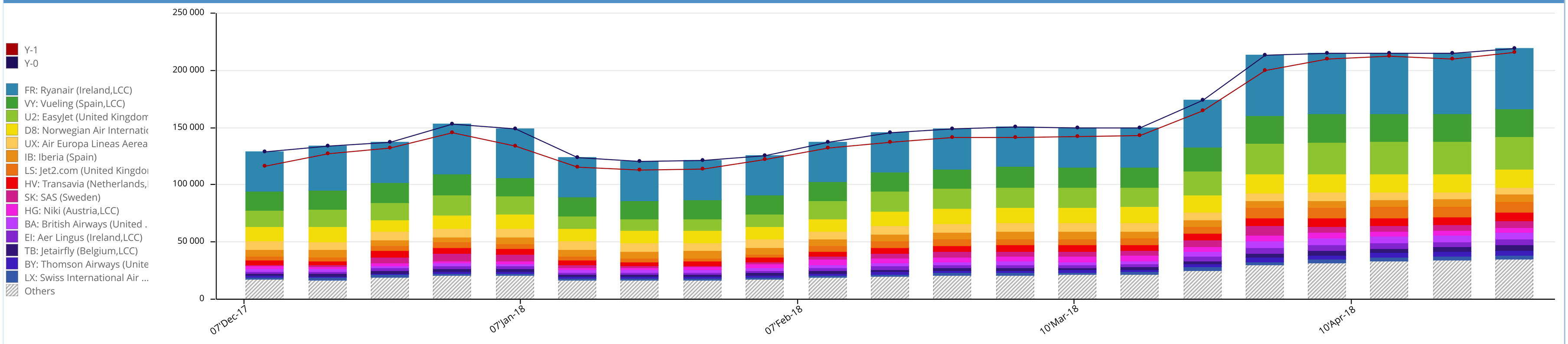


Capacity | Evolution | Full list | **By Seats** | Leg Origin: **All selected** | Segmented by: **Airlines** | Airlines:

AIRLINES	Year 0	Year -1	VAR% Y0 vs Y-1	Share Y0
FR: Ryanair (Ireland,LCC)	842 373	758 079	+11.1%	
VY: Vueling (Spain,LCC)	397 812	361 564	+10.0%	
U2: EasyJet (United Kingdom,LC	383 028	363 300	+5.4%	
D8: Norwegian Air Internationa	276 567	271 746	+1.8%	
UX: Air Europa Lineas Aereas (S	150 490	149 628	+0.6%	
IB: Iberia (Spain)	125 005	112 014	+11.6%	
LS: Jet2.com (United Kingdom,L	116 932	83 124	+40.7%	
HV: Transavia (Netherlands,LCC	112 236	107 494	+4.4%	
SK: SAS (Sweden)	84 945	83 063	+2.3%	
HG: Niki (Austria,LCC)	75 247	14 580	+416.1%	
BA: British Airways (United King	69 525	53 891	+29.0%	
EI: Aer Lingus (Ireland,LCC)	61 600	63 706	-3.3%	
TB: Jetairfly (Belgium,LCC)	55 774	45 419	+22.8%	
BY: Thomson Airways (United K	47 844	53 750	-11.0%	
LX: Swiss International Air Lines	46 235	47 352	-2.4%	
Others	478 809	599 120	-20.1%	
Airlines (selected)	3 324 422	3 167 830	+4.9%	
Total Seats	3 324 422	3 167 830	+4.9%	



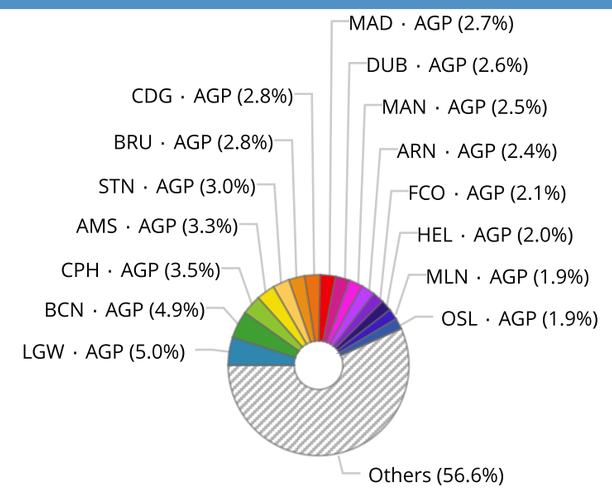
Wed, 06-Dec-2017 to Tue, 01-May-2018



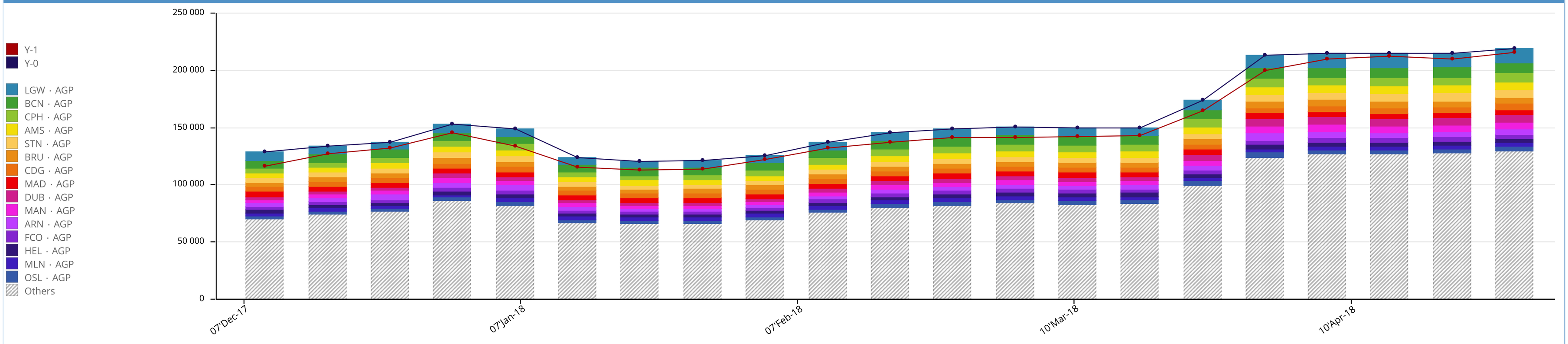
Capacity | Evolution | Full list | **By Seats** | Leg Origin: **All selected** | Segmented by: **Routes** | Airlines:

DIRECT ROUTES	Year 0	Year -1	VAR% Y0 vs Y-1
LGW · AGP	165 205	191 368	-13.7%
BCN · AGP	161 877	135 513	+19.5%
CPH · AGP	117 362	106 016	+10.7%
AMS · AGP	109 662	84 150	+30.3%
STN · AGP	98 922	72 327	+36.8%
BRU · AGP	94 669	101 306	-6.6%
CDG · AGP	93 985	94 200	-0.2%
MAD · AGP	90 291	78 406	+15.2%
DUB · AGP	84 868	82 639	+2.7%
MAN · AGP	82 087	129 090	-36.4%
ARN · AGP	80 603	78 590	+2.6%
FCO · AGP	68 206	69 274	-1.5%
HEL · AGP	66 105	53 545	+23.5%
MLN · AGP	63 744	66 384	-4.0%
OSL · AGP	63 681	63 929	-0.4%
Others	1 883 155	1 761 093	+6.9%
Direct Routes (selected)	3 324 422	3 167 830	+4.9%
Total Seats	3 324 422	3 167 830	+4.9%

Share Y0

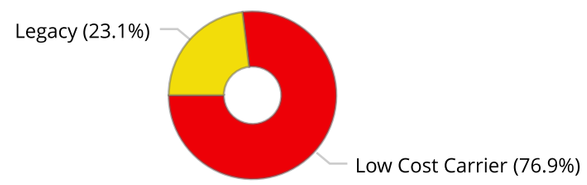


Wed, 06-Dec-2017 to Tue, 01-May-2018

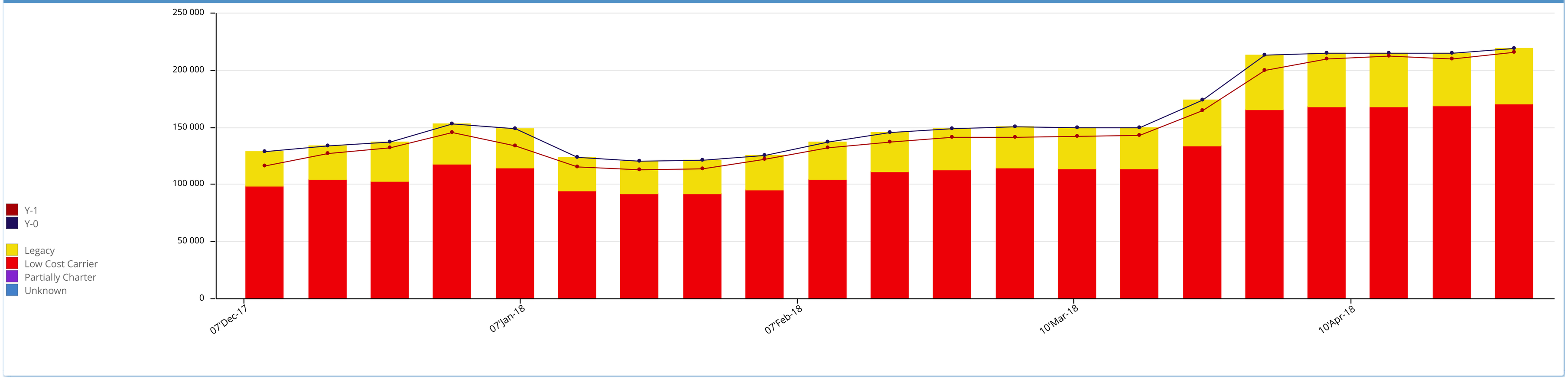


Capacity | Evolution | Full list | **By Seats** | Leg Origin: **All selected** | Segmented by: **Carrier Type** | Airlines:

CARRIER TYPE	Year 0	Year -1	VAR% Y0 vs Y-1	Share Y0
Legacy	767 405	698 190	+9.9%	
Low Cost Carrier	2 557 017	2 469 640	+3.5%	
Partially Charter	0	0		
Unknown	0	0		
Carrier Type (selected)	3 324 422	3 167 830	+4.9%	
Total Seats	3 324 422	3 167 830	+4.9%	

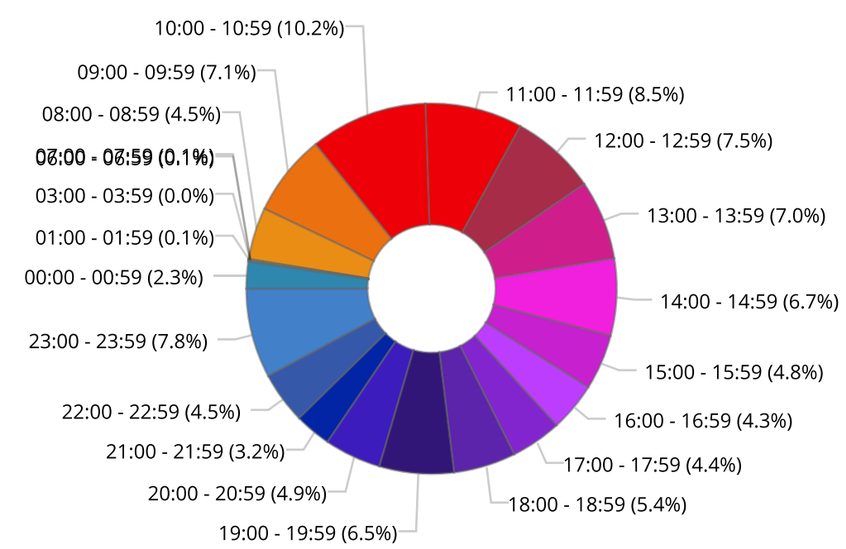


Wed, 06-Dec-2017 to Tue, 01-May-2018

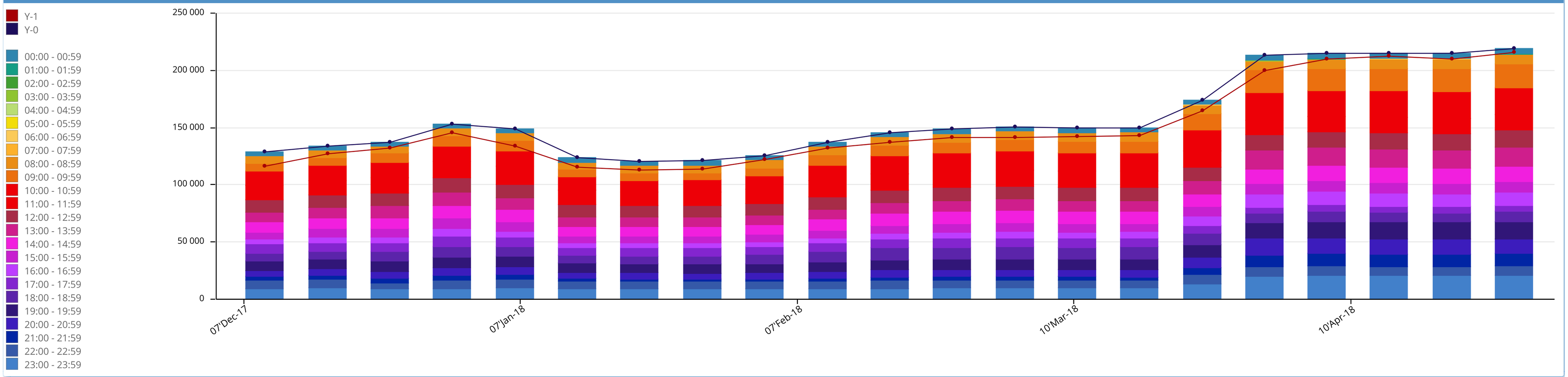


Capacity | Evolution | Full list | **By Seats** | Leg Origin: **All selected** | Segmented by: **Arrival Time** | Airlines:

ARRIVAL SCHEDULE	Year 0	Year -1	VAR% Y0 vs Y-1	Share Y0
00:00 - 00:59	77 300	63 106	+22.5%	
01:00 - 01:59	3 057	672	+354.9%	
02:00 - 02:59	0	0		
03:00 - 03:59	376	0		
04:00 - 04:59	0	0		
05:00 - 05:59	0	0		
06:00 - 06:59	1 776	0		
07:00 - 07:59	2 435	1 240	+96.4%	
08:00 - 08:59	150 918	99 441	+51.8%	
09:00 - 09:59	237 278	232 983	+1.8%	
10:00 - 10:59	340 259	364 846	-6.7%	
11:00 - 11:59	282 465	302 619	-6.7%	
12:00 - 12:59	248 306	216 455	+14.7%	
13:00 - 13:59	231 252	244 286	-5.3%	
14:00 - 14:59	223 726	194 037	+15.3%	
15:00 - 15:59	160 192	179 607	-10.8%	
16:00 - 16:59	141 848	114 739	+23.6%	
17:00 - 17:59	147 143	93 642	+57.1%	
18:00 - 18:59	180 417	160 988	+12.1%	
19:00 - 19:59	215 548	252 125	-14.5%	
20:00 - 20:59	164 393	155 935	+5.4%	
21:00 - 21:59	105 813	113 296	-6.6%	
22:00 - 22:59	149 760	138 810	+7.9%	
23:00 - 23:59	260 160	239 003	+8.9%	
Arrival Schedule (selected)	3 324 422	3 167 830	+4.9%	
Total Seats	3 324 422	3 167 830	+4.9%	

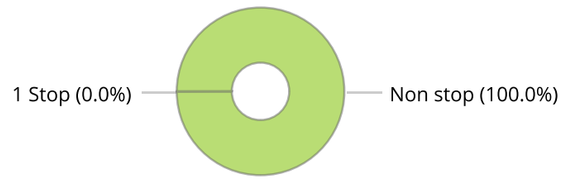


Wed, 06-Dec-2017 to Tue, 01-May-2018

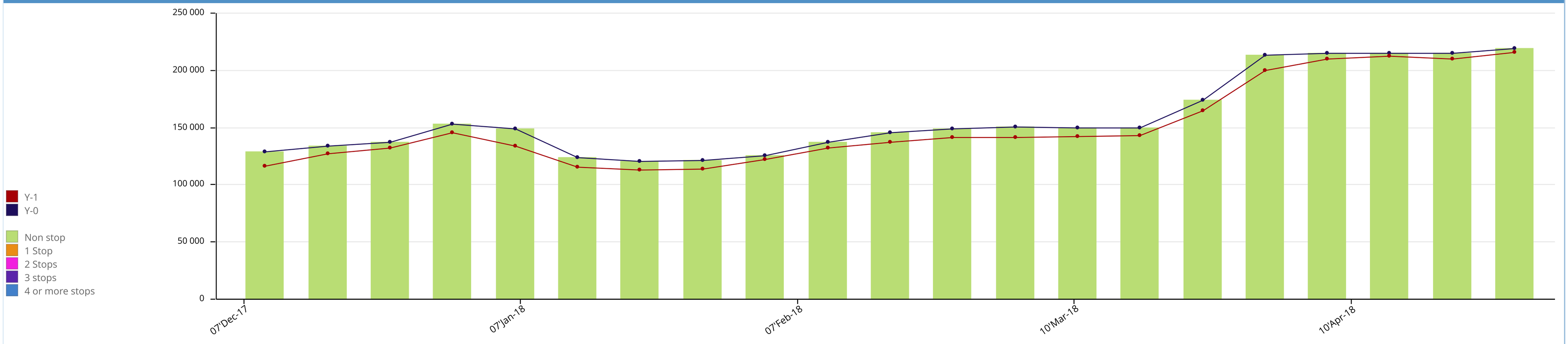


Capacity | Evolution | Full list | **By Seats** | Leg Origin: **All selected** | Segmented by: **Num Stops** | Airlines:

NB. STOPS	Year 0	Year -1	VAR% Y0 vs Y-1	Share Y0
Non stop	3 324 273	3 167 452	+5.0%	
1 Stop	149	378	-60.6%	
2 Stops	0	0		
3 stops	0	0		
4 or more stops	0	0		
Nb. Stops (selected)	3 324 422	3 167 830	+4.9%	
Total Seats	3 324 422	3 167 830	+4.9%	

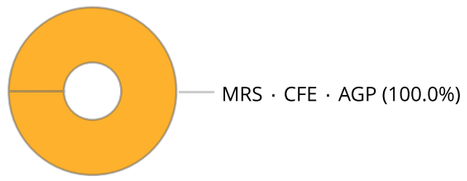


Wed, 06-Dec-2017 to Tue, 01-May-2018

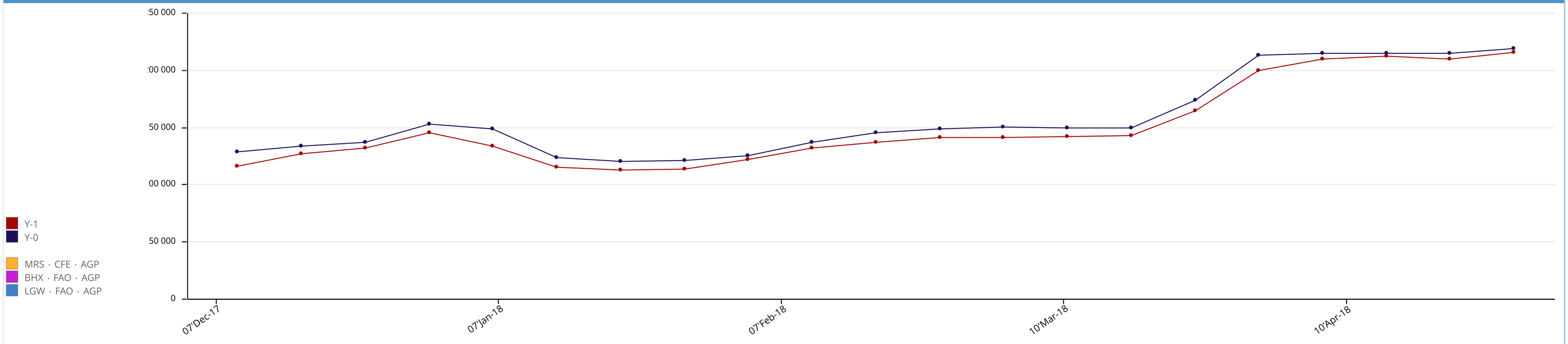


Capacity | Evolution | Full list | **By Seats** | Leg Origin: **All selected** | Segmented by: **Stopover** | Airlines:

FLIGHTS WITH STOPOVER	Year 0	Year -1	VAR% Y0 vs Y-1	Share Y0
MRS · CFE · AGP	149	0		
BHX · FAO · AGP	0	189	-100.0%	
LGW · FAO · AGP	0	189	-100.0%	
Flights with Stopover (selected)	149	378	-60.6%	
Total Seats	3 324 422	3 167 830	+4.9%	

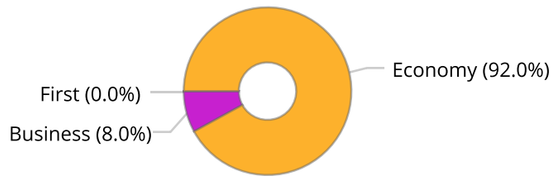


Wed, 06-Dec-2017 to Tue, 01-May-2018

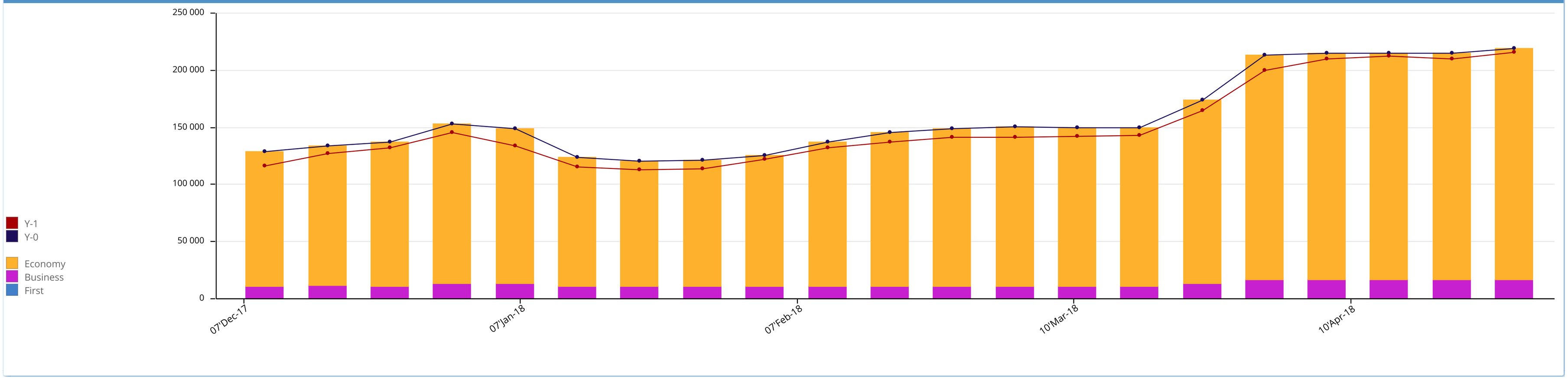


Capacity | Evolution | Full list | **By Seats** | Leg Origin: **All selected** | Segmented by: **Cabin** | Airlines:

CABIN CLASS	Year 0	Year -1	VAR% Y0 vs Y-1	Share Y0
Economy	3 058 660	2 927 732	+4.5%	
Business	264 343	240 090	+10.1%	
First	1 419	8	+17 637.5%	
Cabin Class (selected)	3 324 422	3 167 830	+4.9%	
Total Seats	3 324 422	3 167 830	+4.9%	



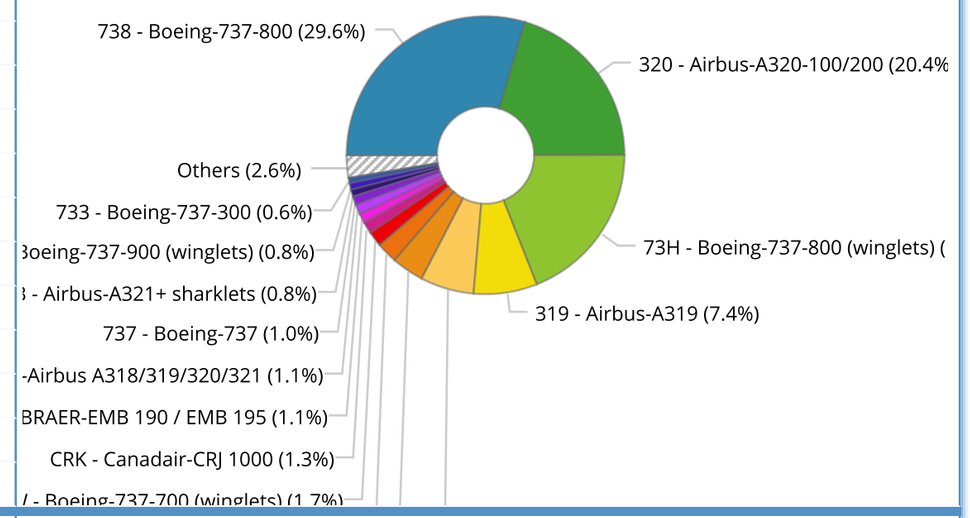
Wed, 06-Dec-2017 to Tue, 01-May-2018



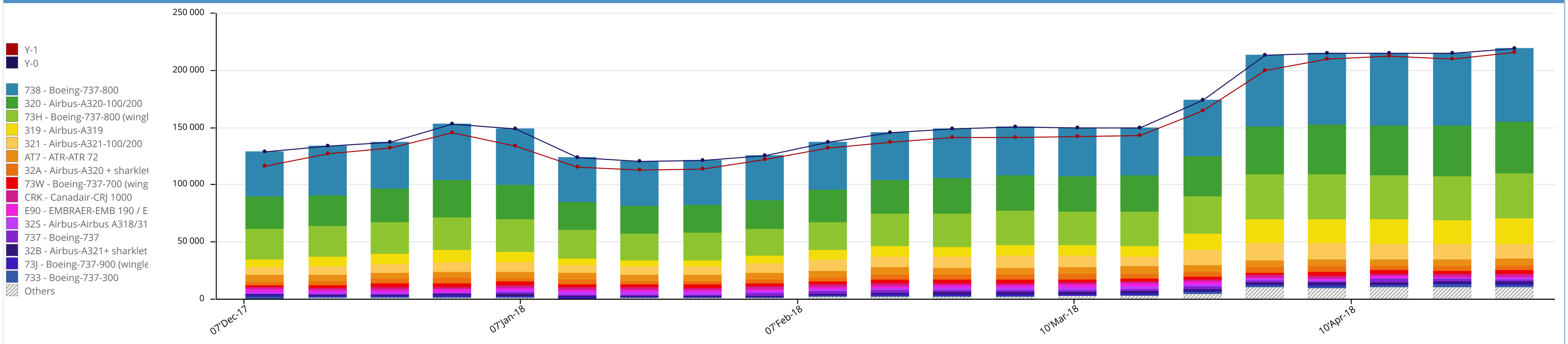
Capacity | Evolution | Full list | **By Seats** | Leg Origin: **All selected** | Segmented by: **Aircraft** | Airlines:

AIRCRAFT	Year 0	Year -1	VAR% Y0 vs Y-1
738 - Boeing-737-800	983 280	1 008 580	-2.5%
320 - Airbus-A320...	678 364	695 729	-2.5%
73H - Boeing-737-...	631 958	534 676	+18.2%
319 - Airbus-A319	245 168	249 469	-1.7%
321 - Airbus-A321...	207 224	237 807	-12.9%
AT7 - ATR-ATR 72	124 912	85 464	+46.2%
32A - Airbus-A320...	81 585	44 055	+85.2%
73W - Boeing-737-...	58 154	35 443	+64.1%
CRK - Canadair-CR...	44 200	28 190	+56.8%
E90 - EMBRAER-EMB...	37 678	32 970	+14.3%
32S - Airbus-Airb...	37 501	36 408	+3.0%
737 - Boeing-737	34 573	3 251	+963.5%
32B - Airbus-A321...	26 374	18 113	+45.6%
73J - Boeing-737-...	25 114	5 966	+321.0%
733 - Boeing-737-300	21 294	23 680	-10.1%
Others	87 043	128 029	-32.0%
Aircraft (selected)	3 324 422	3 167 830	+4.9%
Total Seats	3 324 422	3 167 830	+4.9%

Share Y0

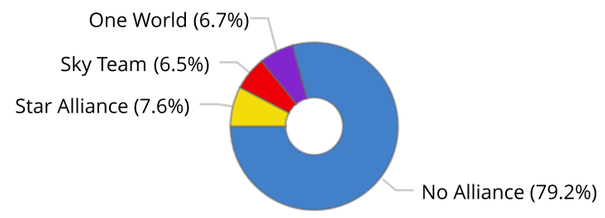


Wed, 06-Dec-2017 to Tue, 01-May-2018

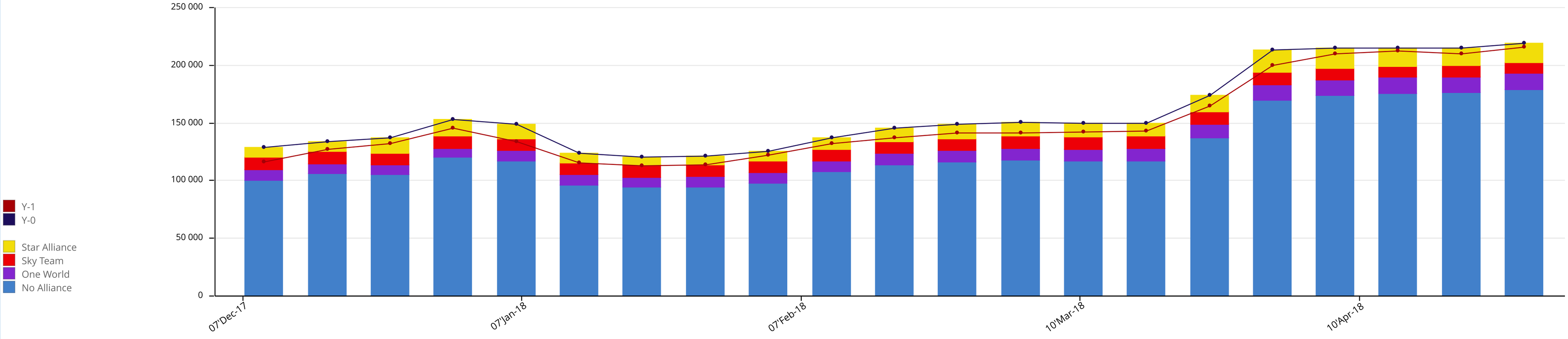


Capacity | Evolution | Full list | **By Seats** | Leg Origin: **All selected** | Segmented by: **Alliance** | Airlines:

ALLIANCES	Year 0	Year -1	VAR% Y0 vs Y-1	Share Y0
Star Alliance	254 010	245 227	+3.6%	
Sky Team	215 976	205 212	+5.2%	
One World	221 458	248 932	-11.0%	
No Alliance	2 632 978	2 468 459	+6.7%	
Alliances (selected)	3 324 422	3 167 830	+4.9%	
Total Seats	3 324 422	3 167 830	+4.9%	

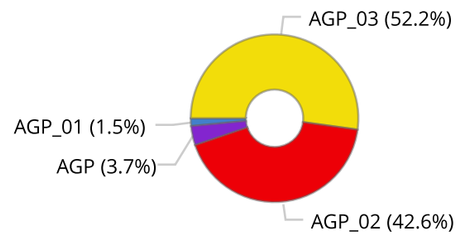


Wed, 06-Dec-2017 to Tue, 01-May-2018

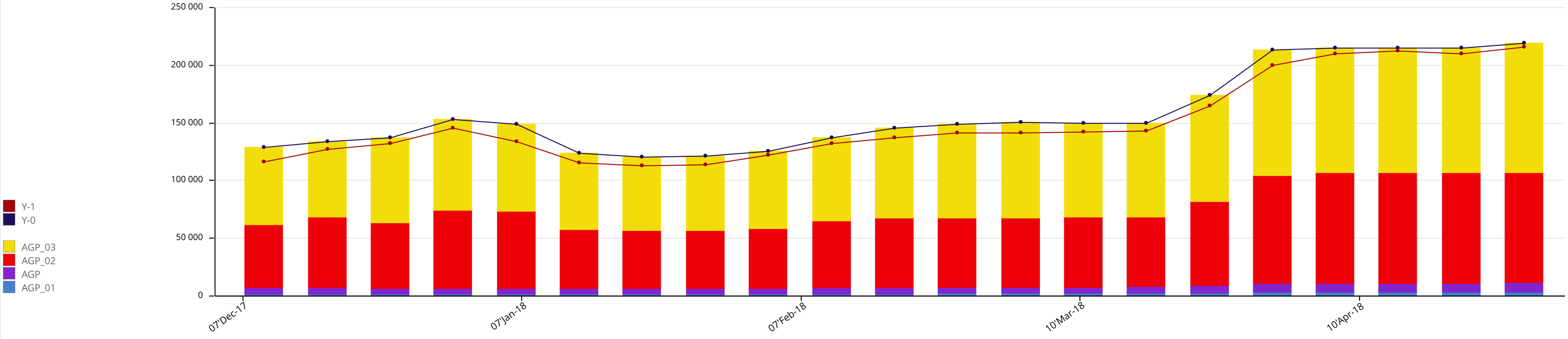


Capacity | Evolution | Full list | **By Seats** | Leg Origin: **All selected** | Segmented by: **Terminal** | Airlines:

TERMINAL	Year 0	Year -1	VAR% Y0 vs Y-1	Share Y0
AGP_03	1 734 389	1 617 052	+7.3%	
AGP_02	1 417 145	1 407 416	+0.7%	
AGP	122 965	82 359	+49.3%	
AGP_01	49 923	61 003	-18.2%	
Terminal (selected)	3 324 422	3 167 830	+4.9%	
Total Seats	3 324 422	3 167 830	+4.9%	

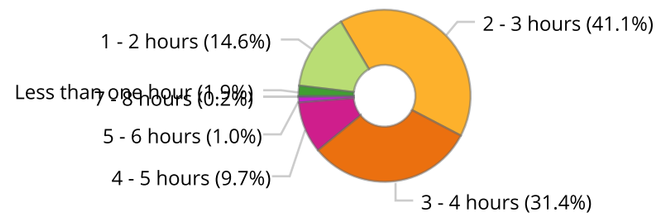


Wed, 06-Dec-2017 to Tue, 01-May-2018

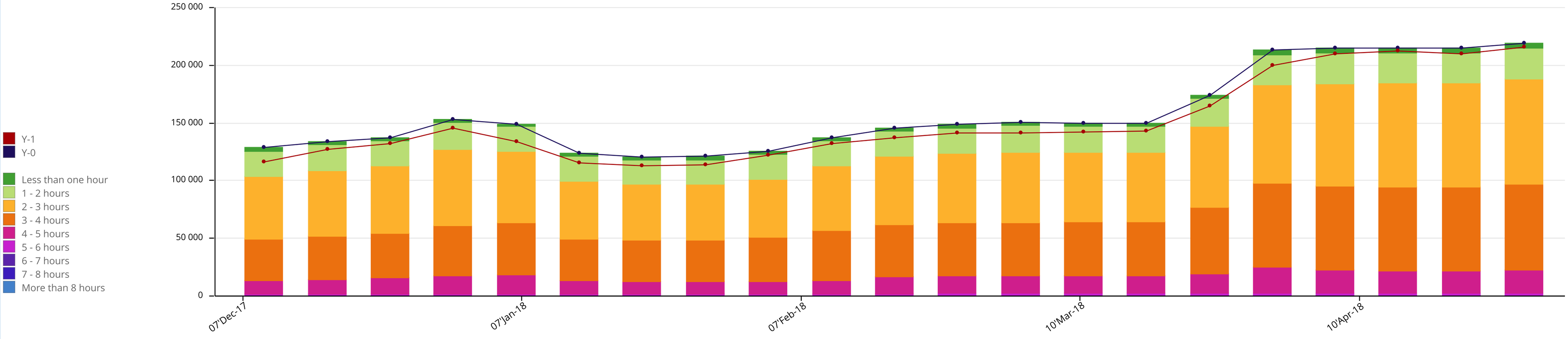


Capacity | Evolution | Full list | **By Seats** | Leg Origin: **All selected** | Segmented by: **Flight Duration** | Airlines:

FLIGHT DURATION	Year 0	Year -1	VAR% Y0 vs Y-1	Share Y0
Less than one hour	62 565	77 346	-19.1%	
1 - 2 hours	486 647	409 327	+18.9%	
2 - 3 hours	1 367 935	1 398 592	-2.2%	
3 - 4 hours	1 043 802	943 784	+10.6%	
4 - 5 hours	321 181	297 284	+8.0%	
5 - 6 hours	34 172	34 025	+0.4%	
6 - 7 hours	0	1 725	-100.0%	
7 - 8 hours	8 120	5 747	+41.3%	
More than 8 hours	0	0		
Flight Duration (selected)	3 324 422	3 167 830	+4.9%	
Total Seats	3 324 422	3 167 830	+4.9%	

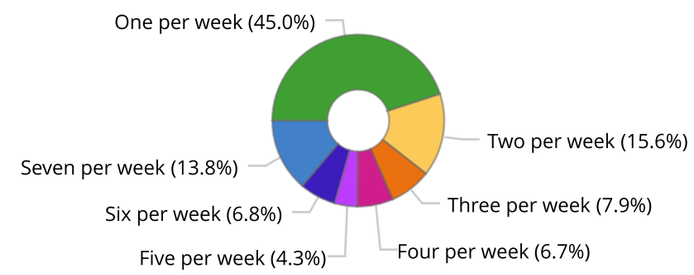


Wed, 06-Dec-2017 to Tue, 01-May-2018

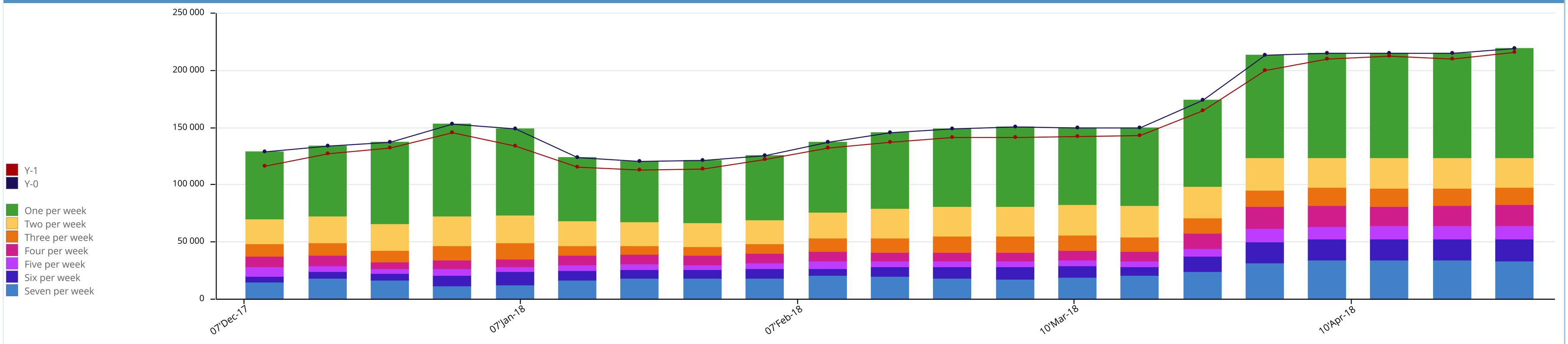


Capacity | Evolution | Full list | **By Seats** | Leg Origin: **All selected** | Segmented by: **Weekly Freq** | Airlines:

WEEKLY FREQUENCIES	Year 0	Year -1	VAR% Y0 vs Y-1	Share Y0
One per week	1 496 585	1 365 821	+9.6%	
Two per week	517 955	443 235	+16.9%	
Three per week	261 417	269 218	-2.9%	
Four per week	221 705	204 484	+8.4%	
Five per week	142 446	197 013	-27.7%	
Six per week	225 868	234 146	-3.5%	
Seven per week	458 446	453 913	+1.0%	
Weekly Frequencies (selected)	3 324 422	3 167 830	+4.9%	
Total Seats	3 324 422	3 167 830	+4.9%	

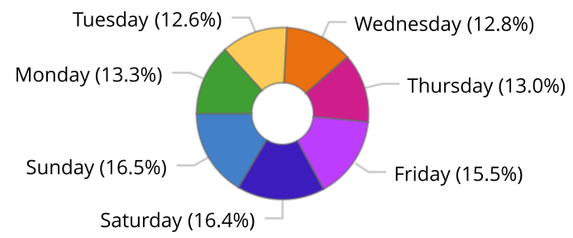
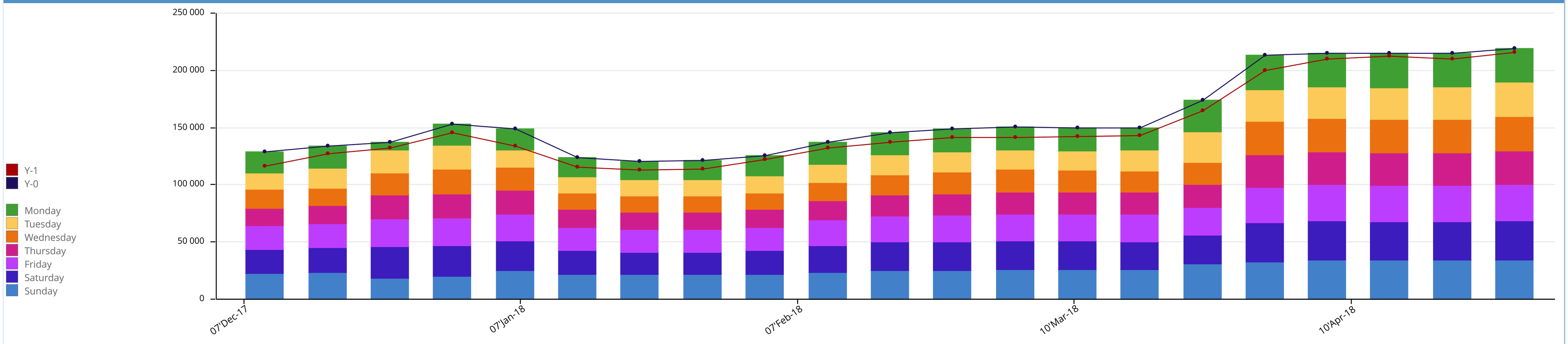


Wed, 06-Dec-2017 to Tue, 01-May-2018



Capacity | Evolution | Full list | **By Seats** | Leg Origin: **All selected** | Segmented by: **Day of Week** | Airlines:

ARRIVAL DAY OF WEEK	Year 0	Year -1	VAR% Y0 vs Y-1	Share Y0
Monday	441 545	434 631	+1.6%	
Tuesday	417 616	402 728	+3.7%	
Wednesday	424 854	389 626	+9.0%	
Thursday	430 794	444 036	-3.0%	
Friday	516 515	460 469	+12.2%	
Saturday	545 449	512 801	+6.4%	
Sunday	547 649	523 539	+4.6%	
Arrival Day of week (selected)	3 324 422	3 167 830	+4.9%	
Total Seats	3 324 422	3 167 830	+4.9%	



Wed, 06-Dec-2017 to Tue, 01-May-2018