

# NSW International Aviation Performance

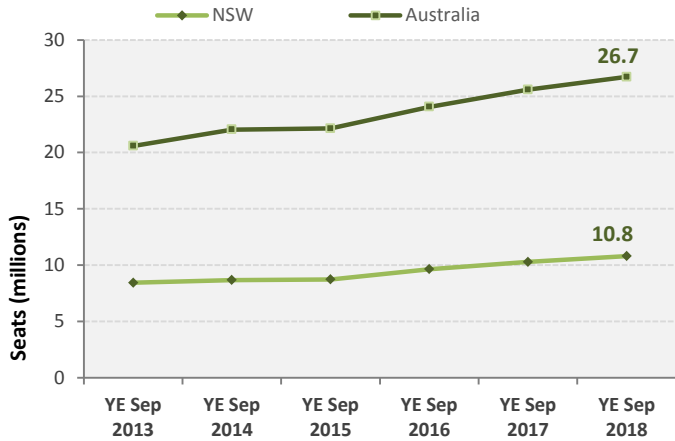
Year Ended September 2018

Capacity source: Bureau of Infrastructure, Transport and Regional Economics.

Arrivals source: Visitor Arrival Statistics, Department of Home Affairs.

## SEAT CAPACITY, FLIGHTS AND SHORT-TERM (S/T) VISITOR ARRIVALS

Chart 1: Inbound seat capacity to NSW and Australia.



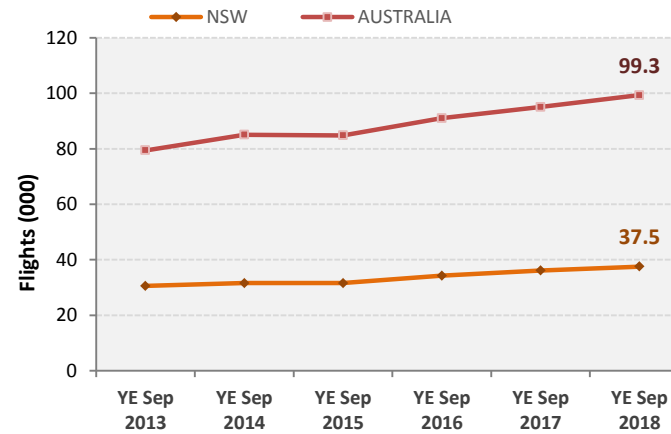
**YE Sep18 vs YE Sep17**

NSW + 4.9%  
Australia + 4.4%

**YE Sep18 vs YE Sep13**

NSW + 27.8%  
Australia + 29.8%

Chart 2: Inbound flights to Australia and NSW and Australia.



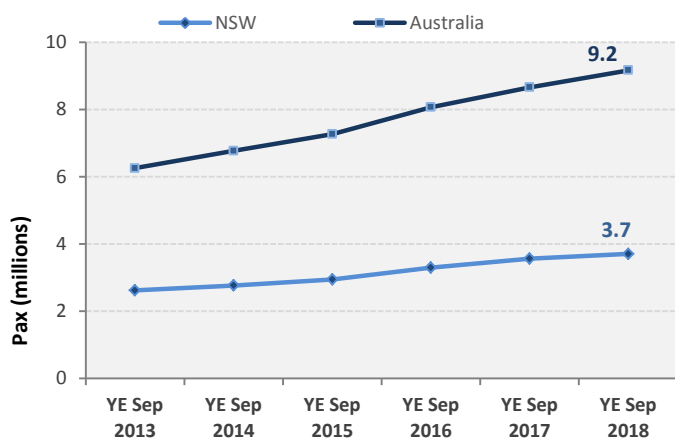
**YE Sep18 vs YE Sep17**

NSW + 3.9%  
Australia + 4.5%

**YE Sep18 vs YE Sep13**

NSW + 23.0%  
Australia + 25.1%

Chart 3: Inbound short-term visitor arrivals to NSW and Australia.



**YE Sep18 vs YE Sep17**

NSW + 3.9%  
Australia + 5.8%

**YE Sep18 vs YE Sep13**

NSW + 41.5%  
Australia + 46.6%

In the **year ended (YE) September 2018**, a total of 10.8 million **seats** were available to NSW, up 4.9% on YE September 2017 which was above the national growth of 4.4%. When compared to YE September 2013, the number of NSW seats increased by 27.8%. Of all Australian states and territories, NSW had the highest share of the inbound seat capacity (40%) in YE September 2018. [Chart 1]

In the same year, the number of **flights** to NSW was 37,500, up 3.9% on the previous year, slightly below the national growth (up 4.5%). Since YE September 2013, the number of NSW flights increased by 23.0%. NSW had the highest share (38%) of all flights to Australia for the year ending September 2018. [Chart 2]

In YE September 2018, NSW recorded 3.7 million inbound **short-term visitor arrivals**, up 3.9% on the previous year and 41.5% over the past five years. NSW visitor growth for YE September 2018 was below the national growth of 5.8%. NSW received the highest number of short-term visitor arrivals in YE September 2018 with 40% share of all short-term arrivals to Australia. [Chart 3]

The **average passenger load factor** on all international flights that operated to and from NSW (Sydney Airport) remained unchanged (77.2%) in YE September 2018 when compared with YE September 2017. The NSW average passenger load factor was slightly below the national average (77.5%).

## INBOUND SEAT CAPACITY TO NSW BY ORIGIN COUNTRY

Chart 3 : Inbound seat capacity to NSW - top 10 country markets time series.

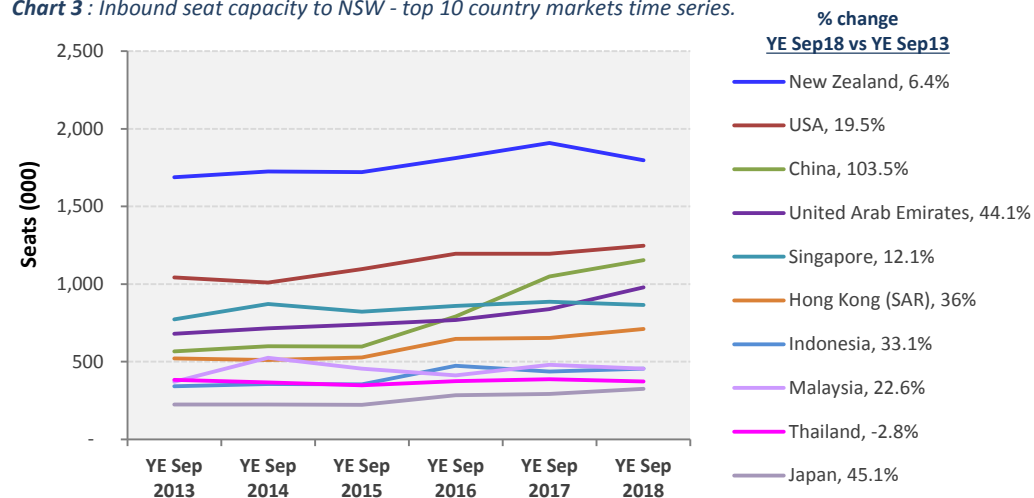


Table 1: Inbound seat capacity to NSW - top 10 country markets.

TOP COUNTRY MARKETS TO NSW	Inbound seats YE Sep 2018 (000) (1)	% change on YE Sep 2017	Change in volume on YE Sep 2017 (000)	% share of total seats to NSW YE Sep 2018 (2)	% share of total seats to NSW YE Sep 2017	Share of total NSW seats by country (Top carriers) YE September 2018		
<b>New Zealand</b>	1,796.7	-5.8%	-111.3	16.6%	18.5%	1. Air New Zealand (36%) 2. Qantas Airways (35%)	3. Emirates (10%) 4. Virgin Australia (9%)	5. Jetstar (9%)
<b>USA</b>	1,246.5	4.2%	50.4	11.6%	11.6%	1. Qantas Airways (39%) 2. United Airlines (19%)	3. Virgin Australia (9%) 4. American Airlines (4%)	5. Delta Air Lines (8%)
<b>China</b>	1,155.1	10.2%	106.9	10.7%	10.2%	1. China Southern Airlines (24%) 2. China Eastern Airlines (24%)	3. Qantas Airways (17%) 4. Air China (16%)	5. Xiamen Airlines (7%)
<b>United Arab Emirates</b>	978.9	16.5%	139.0	9.1%	8.2%	1. Emirates (64%) 2. Etihad Airways (36%)		
<b>Singapore</b>	866.0	-2.4%	-21.0	8.0%	8.6%	1. Singapore Airlines (69%) 2. Qantas Airways (18%)	3. Scoot Tigerair (13%)	
<b>Hong Kong (SAR)</b>	710.3	8.7%	56.6	6.6%	6.4%	1. Cathay Pacific Airways (62%) 2. Qantas Airways (35%)	3. Virgin Australia (3%)	
<b>Indonesia</b>	456.0	4.2%	18.2	4.2%	4.3%	1. Garuda Indonesia (29%) 2. Qantas Airlines (27%)	3. Jetstar (26%) 4. Virgin Australia (18%)	
<b>Malaysia</b>	454.8	-5.5%	-26.4	4.2%	4.7%	1. AirAsia (52%) 2. Malaysia Airlines (48%)		
<b>Thailand</b>	372.2	-4.2%	-16.2	3.4%	3.8%	1. Thai Airways Int'l (58%) 2. Qantas Airways (27%)	3. Jetstar (15%)	
<b>Japan</b>	325.1	10.8%	31.7	3.0%	2.9%	1. Qantas Airways (51%) 2. All Nippon Airways (27%)	3. Japan Airlines (22%)	
<b>Total</b>	10,791.4	4.9%	501.5	100%	100%	1. Qantas Airways (24%) 2. Emirates (7%)	3. Air New Zealand (6%) 4. Singapore Airlines (6%)	5. Jetstar (5%)

NOTE: (1) Flight origin country is the international country where the "same flight number" service commenced; not necessarily the nationality of the inbound visitor.

NOTE: (2) read this as (example) In YE September 2018, New Zealand accounted for 16.6% of total seat capacity to NSW.

New Zealand continues to rank the highest in the number of inbound seats to NSW. In **YE September 2018**, it recorded 1.8 million seats, followed by USA (1.25 million) and China (1.16 million). Of the top ten origin countries, United Arab Emirates (UAE) showed the highest growth in volume of inbound seats to NSW when compared to the previous year (up 139,000 or +16.5%) followed by China (up 106,900 or +10.2%). These two countries alone contributed half of total increase in NSW seat capacity.

In terms of market share, all the top country markets retained relatively similar share in 2018 as in the previous year, except New Zealand who lost 1.9%pts.

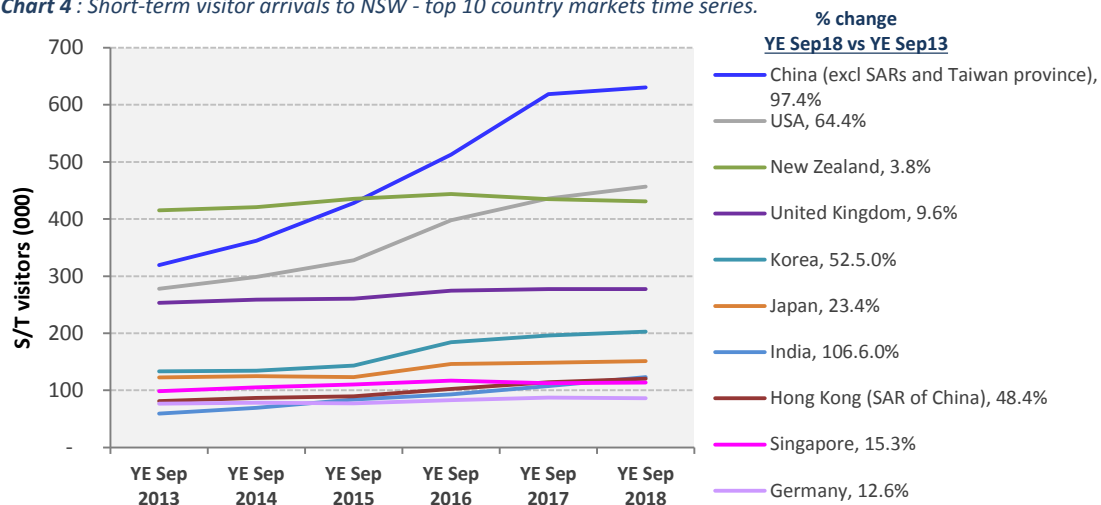
The country market carriers had the highest share of seats on the flights from their respective service countries with one exception being Qantas Airways which had the highest share of seats from USA and Japan to NSW.

Over the period **YE September 2013** to **YE September 2018**, flights from China, Japan and UAE recorded the strongest increases of inbound seats to NSW (+103.5%, +45.1% and +44.1%, respectively).

Over the past few years, several new airlines commenced flights to Sydney including Air AsiaX and Scoot in 2012, Air India in 2013, Air Nippon Airways in 2015 and Qatar Airways in 2016. Qantas commenced new services from Los Angeles and San Francisco in 2015 and from Osaka 2017. Most notable has been rapid increases from China. By YE September 2018, nine mainland Chinese airlines were operating services to Sydney from 17 Chinese cities. Most recent services (in 2018) include Tianjin Airlines flights to Sydney and Hainan Airlines first direct flights between Hainan Island and Sydney.

## SHORT-TERM (S/T) VISITOR ARRIVALS TO NSW BY MARKET

Chart 4 : Short-term visitor arrivals to NSW - top 10 country markets time series.



China has ranked number one market in short-term visitor arrivals to NSW since 2015. In YE September 2018, there were 0.63 million arrivals from China to the State, followed by arrivals from USA (0.46 million) and New Zealand (0.43 million). Of the top ten country markets to NSW, USA recorded the largest growth in arrivals (up 20,400 arrivals or +4.7%), followed by India (up 15,500 or +14.5%) and China (up 11,900 or +1.9%).

Over the past year, China had the highest share of all short-term arrivals to NSW, 17.4%. USA had the second highest share (12.6%), followed by New Zealand (11.9%).

In the period YE September 2013 to YE September 2018, short-term arrivals from India, China and USA recorded the strongest increases (+106.6%, +97.4% and +64.4%, respectively).

The country market carriers had the highest share of short-term arrivals from their respective service countries with the exception of the USA, United Kingdom and Japan where Qantas Airways was the top carrier; India where Singapore Airlines had the most passenger share and Germany where Emirates led.

Table 2: Short-term visitor arrivals to NSW - top 10 country markets.

TOP COUNTRY MARKETS TO NSW	S/T visitor arrivals YE Sep 2018 (000) (1)	% change on YE Sep 2017	Change in volume on YE Sep 2017 (000)	% share of S/T visitor arrivals to NSW YE Sep 2018 (2)	% share of S/T visitor arrivals to NSW YE Sep 2017	Share of total short-term visitor arrivals to NSW by country (Top carriers) YE September 2018		
<b>China (excl SARs and Taiwan province)</b>	630.4	1.9%	11.9	17.4%	18.3%	1. China Eastern Airlines (20%)	3. China Southern Airlines (16%)	5. Cathay Pacific Airways (6%)
<b>USA</b>	456.5	4.7%	20.4	12.6%	12.9%	2. Qantas Airways (18%)	4. Air China (13%)	
<b>New Zealand</b>	430.8	-1.0%	-4.2	11.9%	12.9%	1. Qantas Airways (25%)	3. Delta Air Lines (11%)	5. Virgin Australia (7%)
<b>United Kingdom</b>	277.5	0.0%	-0.1	7.7%	8.2%	2. United Airlines (19%)	4. American Airlines (11%)	
<b>Korea</b>	203.1	3.5%	6.8	5.6%	5.8%	1. Air New Zealand (53%)	3. Virgin Australia (9%)	5. Lan Chile (Air Chile) (4%)
<b>Japan</b>	151.0	1.9%	2.8	4.2%	4.4%	2. Qantas Airways (21%)	4. Jetstar (Australia) (6%)	
<b>India</b>	123.0	14.5%	15.5	3.4%	3.2%	1. Emirates (17%)	3. Etihad (12%)	5. Singapore Airlines (9%)
<b>Hong Kong (SAR of China)</b>	120.4	5.4%	6.1	3.3%	3.4%	2. Qantas Airways (16%)	4. British Airways (10%)	
<b>Singapore</b>	113.6	0.7%	0.8	3.1%	3.3%	1. Asiana Airlines (Korea) (36%)	3. Qantas Airways (6%)	5. Emirates (3%)
<b>Germany</b>	86.2	-1.6%	-1.4	2.4%	2.6%	2. Korean Airlines (31%)	4. Air Asia X (3%)	
<b>Total</b>	3,704.5	7.5%	253.5	100%	100%	1. Qantas Airways (38%)	3. Japan Airlines (19%)	5. Singapore Airlines (2%)
						2. All Nippon Airways (25%)	4. Cathay Pacific Airways (4%)	
						1. Singapore Airlines (23%)	3. Air India (17%)	5. Air Asia X (8%)
						2. Malaysian Airline (17%)	4. Qantas Airways (12%)	
						1. Cathay Pacific Airways (49%)	3. Singapore Airlines (3%)	5. China Southern Airlines (1%)
						2. Qantas Airways (35%)	4. Virgin Australia (3%)	
						1. Singapore Airlines (49%)	3. Tiger Airways (17%)	5. Air New Zealand (1%)
						2. Qantas Airways (19%)	4. British Airways (6%)	
						1. Emirates (21%)	3. Etihad (12%)	5. Cathay Pacific Airways (6%)
						2. Qantas Airways (13%)	4. Singapore Airlines (11%)	
						1. Qantas Airways (19%)	3. Singapore Airlines (6%)	5. Cathay Pacific Airways (5%)
						2. Air New Zealand (8%)	4. Emirates (6%)	

NOTE: (1) International visitors whose length of stay is less than 12 months.

NOTE: (2) read this as (example) In YE September 2018, 17.4% of total international short-term visitor arrivals to NSW were from China.