

NSW International Aviation Performance

Capacity source: Bureau of Infrastructure, Transport and Regional Economics.
 Arrivals source: Visitor Arrival Statistics, Department of Home Affairs.

Year Ended December 2019

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

Chart 1: Inbound seat capacity to NSW and Australia.

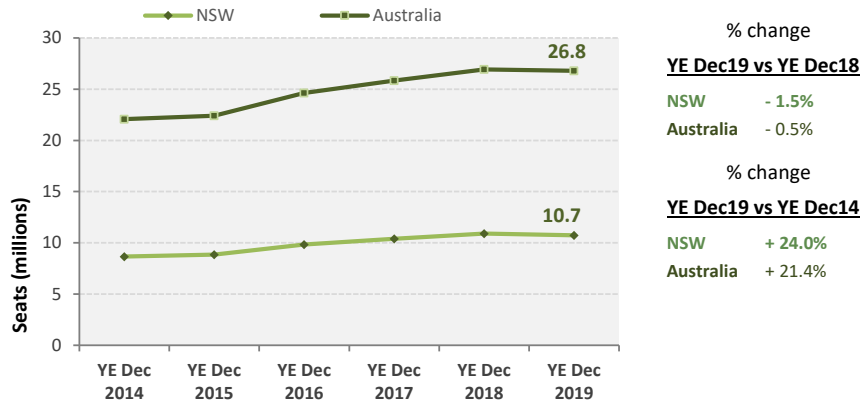


Chart 2: Inbound flights to NSW and Australia.

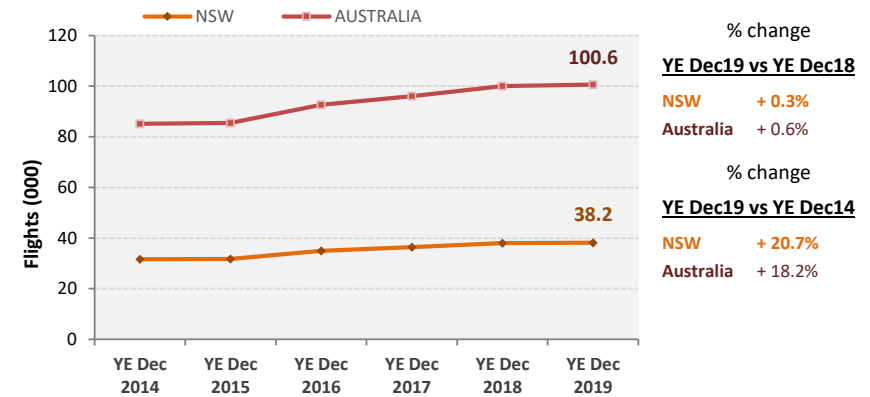
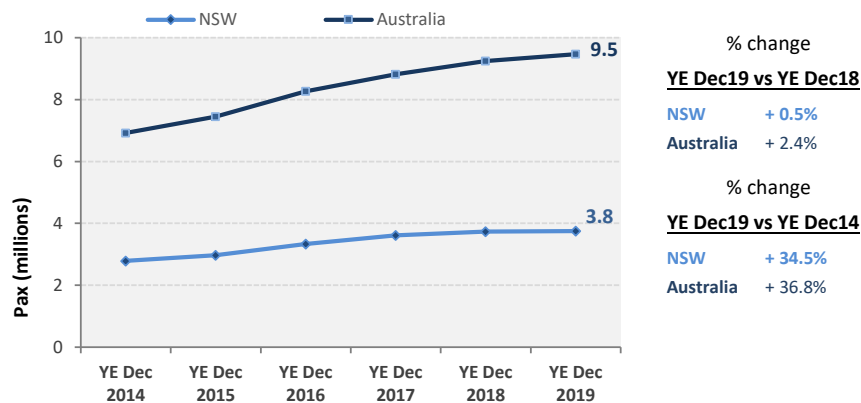


Chart 3: Inbound short-term visitor arrivals to NSW and Australia.



In the year ended (YE) December 2019, a total of 10.7 million **seats** were available to NSW, down 1.5% on previous year but up 24.0% on YE December 2014. Of all Australian states and territories, NSW had the highest share of the inbound seat capacity (40%) for the year. [Chart 1]

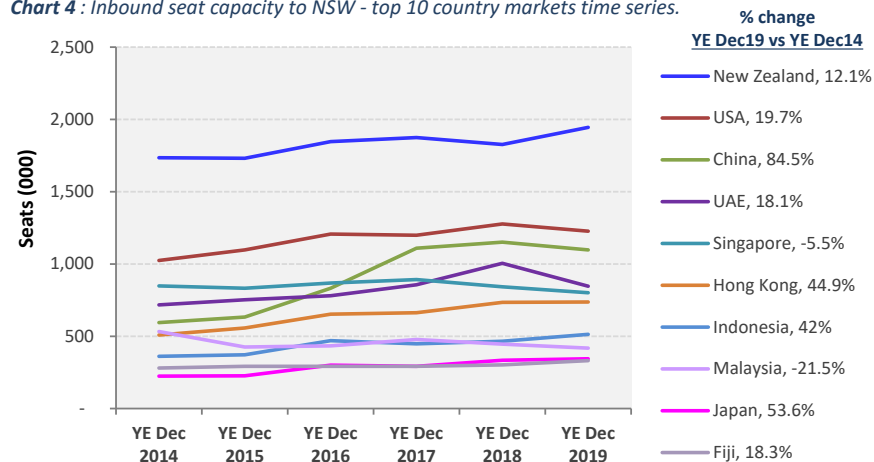
The number of inbound **flights** to NSW was 38,200, up 0.3% on previous year and by 20.7% in the last five years. NSW had the highest share (38%) of all flights to Australia for the year. [Chart 2]

NSW recorded 3.8 million inbound **short-term visitor arrivals**, up 0.5% on YE December 2018 and by 34.5% over the past five years. NSW received the highest number of short-term visitor arrivals for the year 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 and Newcastle Airports) in YE December 2019 was 78.8%, which was 1.6% pts higher than in the previous year. NSW load factor for the year was slightly below the national average of 79.7%.

INBOUND SEAT CAPACITY TO NSW BY ORIGIN COUNTRY

Chart 4 : Inbound seat capacity to NSW - top 10 country markets time series.



New Zealand continues to rank the highest in the number of inbound seats to NSW in **YE December 2019**, with 1.9 million seats, followed by USA and China. Of the top ten origin countries, New Zealand showed the highest growth in the volume of inbound seats to NSW over the past year which was supported by additional flights between Auckland and Newcastle (Jan to Feb 2019 and Nov to Dec 2019). Indonesia showed second strongest increase in inbound seats to NSW which came partly from Malindo Air's new service from Kuala Lumpur via Indonesia which commenced in August 2019. [Table 1]

Foreign country 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, Japan and Indonesia to NSW.

Over the period **YE December 2014 to YE December 2019**, flights from China, Japan and Hong Kong recorded the strongest increases of inbound seats to NSW. [Chart 4]

Over the past few years, several new airlines commenced flights to Sydney including Air Nippon Airways in 2015, Qatar Airways in 2016, Virgin Australia, United Airlines and Virgin Australia in 2018. Qantas Airways commenced services from San Francisco in 2015, from Denpasar in 2016 and from Osaka and Beijing in 2017. Currently, eight Chinese airlines are operating services to Sydney from 16 Chinese cities. Five of these airlines commenced services to NSW in 2015 and later. Tianjin Airlines resumed its Tianjin-Zhengzhou-Sydney flight from Nov 2019.

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

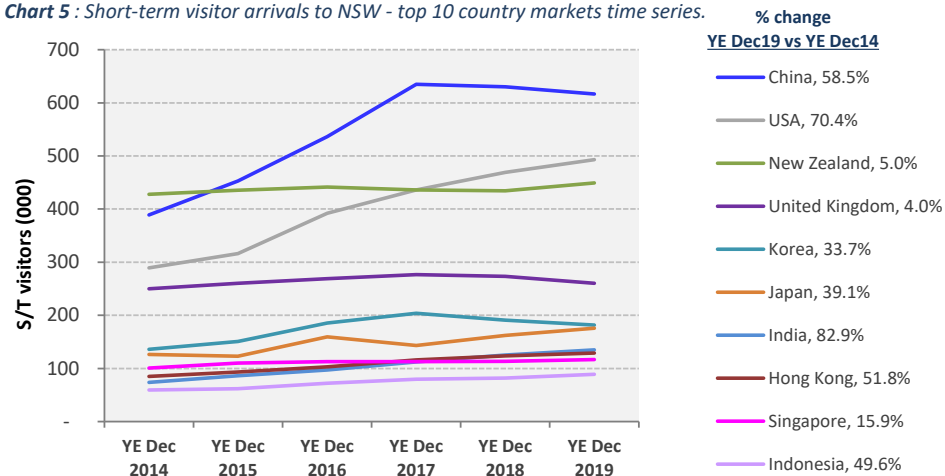
TOP COUNTRY MARKETS TO NSW	Inbound seats YE Dec 2019 (000) (1)	% change on YE Dec 2018	Change in volume on YE Dec 2018 (000)	% share of total seats to NSW YE Dec 2019 (2)	% share of total seats to NSW YE Dec 2018	Share of total NSW seats by country (Top carriers) YE Dec 2019
New Zealand	1,945.0	6.5%	119.4	18.1%	16.7%	1. Air New Zealand (35%) 2. Qantas Airways (34%) 3. Virgin Australia (14%) 4. Emirates (10%) 5. Jetstar (8%)
USA	1,226.3	-4.0%	-50.6	11.4%	11.7%	1. Qantas Airways (40%) 2. United Airlines (18%) 3. Virgin Australia (10%) 4. Delta Air Lines (9%) 5. American Airlines (8%)
China	1,096.9	-4.7%	-54.1	10.2%	10.6%	1. China Eastern Airlines (27%) 2. China Southern Airlines (24%) 3. Qantas Airways (15%) 4. Air China (14%) 5. Xiamen Airlines (7%)
UAE	847.0	-15.7%	-157.8	7.9%	9.2%	1. Emirates (64%) 2. Etihad Airways (36%)
Singapore	801.0	-4.8%	-40.3	7.5%	7.7%	1. Singapore Airlines (76%) 2. Qantas Airways (14%) 3. Scoot Tigerair (10%)
Hong Kong	737.0	0.2%	1.7	6.9%	6.7%	1. Cathay Pacific Airways (59%) 2. Qantas Airways (28%) 3. Virgin Australia (13%)
Indonesia	513.3	10.4%	48.3	4.8%	4.3%	1. Qantas Airlines (33%) 2. Garuda Indonesia (27%) 3. Jetstar (23%) 4. Virgin Australia (18%)
Malaysia	418.1	-6.2%	-27.8	3.9%	4.1%	1. Malaysia Airlines (51%) 2. AirAsia (44%)
Japan	344.3	3.0%	9.9	3.2%	3.1%	1. Qantas Airways (54%) 2. All Nippon Airways (25%) 3. Japan Airlines (20%)
Fiji	331.5	9.8%	29.5	3.1%	2.8%	1. Fiji Airways (56%) 2. Virgin Australia (22%) 3. Jetstar (14%) 4. Qantas Airways (8%)
Total to NSW	10,742.4	-1.5%	-163.6	100%	100%	1. Qantas Airways (24%) 2. Emirates (7%) 3. Air New Zealand (6%) 4. Virgin Australia (6%) 5. Singapore Airlines (6%)

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 the Year ending December 2019, New Zealand accounted for 18.1% of total seat capacity to NSW.

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

Chart 5 : 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 December 2019, there were 0.62 million arrivals from China to the State, followed by arrivals from USA and New Zealand. Of the top ten country markets to NSW, USA recorded the largest growth in arrivals (up 23,700 arrivals), followed by New Zealand and Japan. [Table 2]

Over the past year, China had the highest share of all short-term arrivals to NSW (16.4%) , followed by USA and New Zealand.

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

In the period YE December 2014 to YE December 2019, short-term arrivals from India, USA and China recorded the strongest increases. [Chart 5]

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

TOP COUNTRY MARKETS TO NSW	S/T visitor arrivals YE Dec 2019 (000) (1)	% change on YE Dec 2018	Change in volume on YE Dec 2018 (000)	% share of S/T visitor arrivals to NSW YE Dec 2019 (2)	% share of S/T visitor arrivals to NSW YE Dec 2018	Share of total short-term visitor arrivals to NSW by country (Top carriers) YE Dec 2019
China	616.4	-2.2%	-13.7	16.4%	16.9%	1. China Eastern Airlines (21%) 2. China Southern Airlines (17%) 3. Qantas Airways (16%) 4. Air China (12%) 5. Cathay Pacific Airways (7%)
USA	493.0	5.1%	23.7	13.1%	12.6%	1. Qantas Airways (25%) 2. United Airlines (21%) 3. American Airlines (11%) 4. Delta Air Lines (11%) 5. Virgin Australia (10%)
New Zealand	449.2	3.5%	15.0	12.0%	11.6%	1. Air New Zealand (55%) 2. Qantas Airways (20%) 3. Virgin Australia (8%) 4. Jetstar (Australia) (6%) 5. LATAM Airlines (4%)
United Kingdom	260.1	-4.9%	-13.4	6.9%	7.3%	1. Emirates (17%) 2. Qantas Airways (15%) 3. British Airways (12%) 4. Singapore Airlines (11%) 5. Etihad (10%)
Korea	181.9	-4.8%	-9.1	4.8%	5.1%	1. Asiana Airlines (Korea) (37%) 2. Korean Airlines (33%) 3. Qantas Airways (5%) 4. Emirates (3%) 5. Air Asia X (2%)
Japan	175.7	8.3%	13.5	4.7%	4.3%	1. Qantas Airways (38%) 2. All Nippon Airways (20%) 3. Japan Airlines (16%) 4. Asiana Airlines (Korea) (6%) 5. Korean Airlines (4%)
India	135.0	7.7%	9.6	3.6%	3.4%	1. Singapore Airlines (24%) 2. Malaysian Airline (18%) 3. Air India (18%) 4. Air Asia X (8%) 5. Qantas Airways (7%)
Hong Kong	129.0	4.5%	5.6	3.4%	3.3%	1. Cathay Pacific Airways (50%) 2. Qantas Airways (27%) 3. Virgin Australia (11%) 4. Singapore Airlines (2%) 5. China Southern Airlines (1%)
Singapore	116.8	2.9%	3.3	3.1%	3.0%	1. Singapore Airlines (52%) 2. Qantas Airways (22%) 3. Tiger Airways (11%) 4. British Airways (7%) 5. Air New Zealand (1%)
Indonesia	89.0	8.6%	7.1	2.4%	2.2%	1. Qantas Airways (40%) 2. Garuda Indonesian Airlines (26%) 3. Singapore Airlines (17%) 4. Air Asia X (3%) 5. Jetstar (Australia) (3%)
Total to NSW	3,750.8	0.5%	17.3	100%	100%	1. Qantas Airways (19%) 2. Air New Zealand (9%) 3. Singapore Airlines (6%) 4. Emirates (5%) 5. Cathay Pacific Airways (5%)

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

NOTE: (2) read this as (example) In the Year ending December 2019, 16.4% of total international short-term visitor arrivals to NSW were from China.