



SYDNEY AIRPORT CEO
GEOFF CULBERT



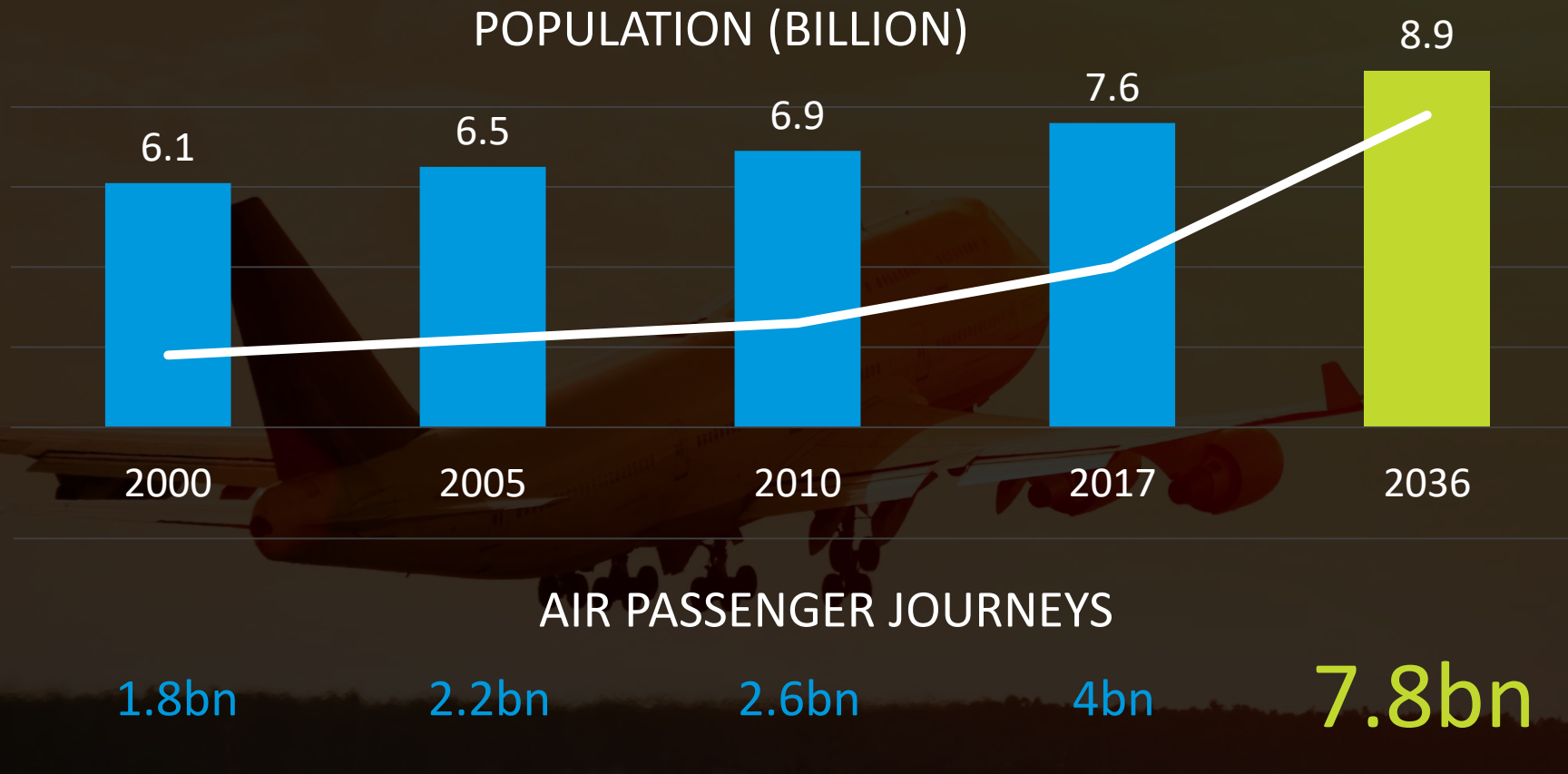
MAJOR TRENDS IN TRAVEL AND AVIATION

1 / The rise in global travel

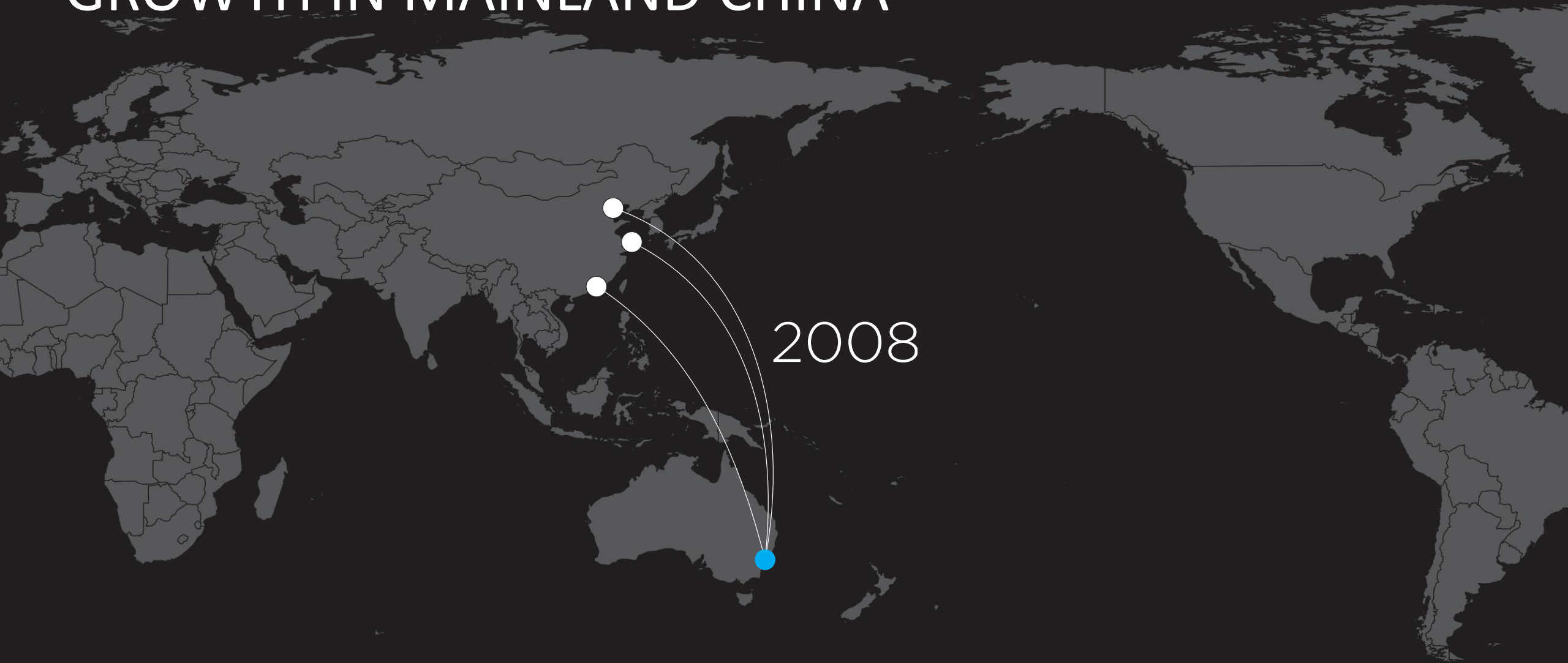
2 / The affordability and accessibility of
travel

3 / The changing nature of aircraft

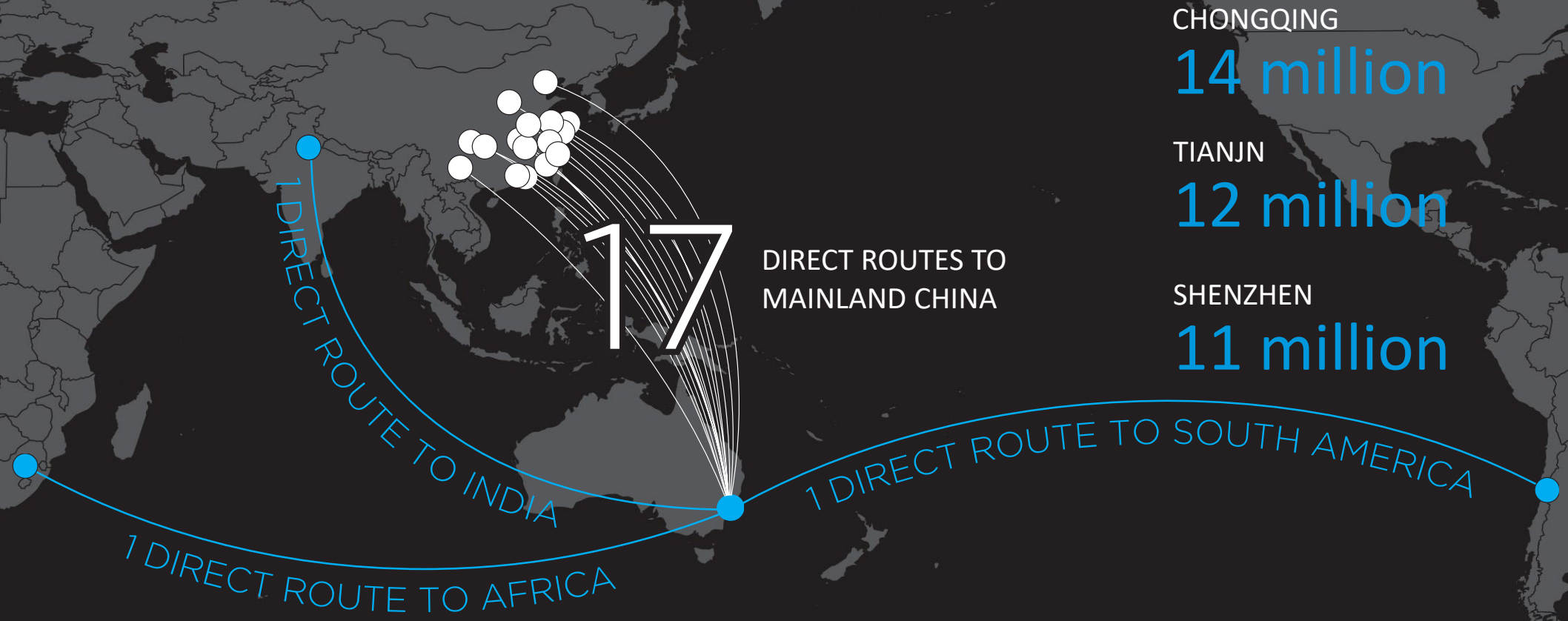
1 / THE RISE IN GLOBAL TRAVEL

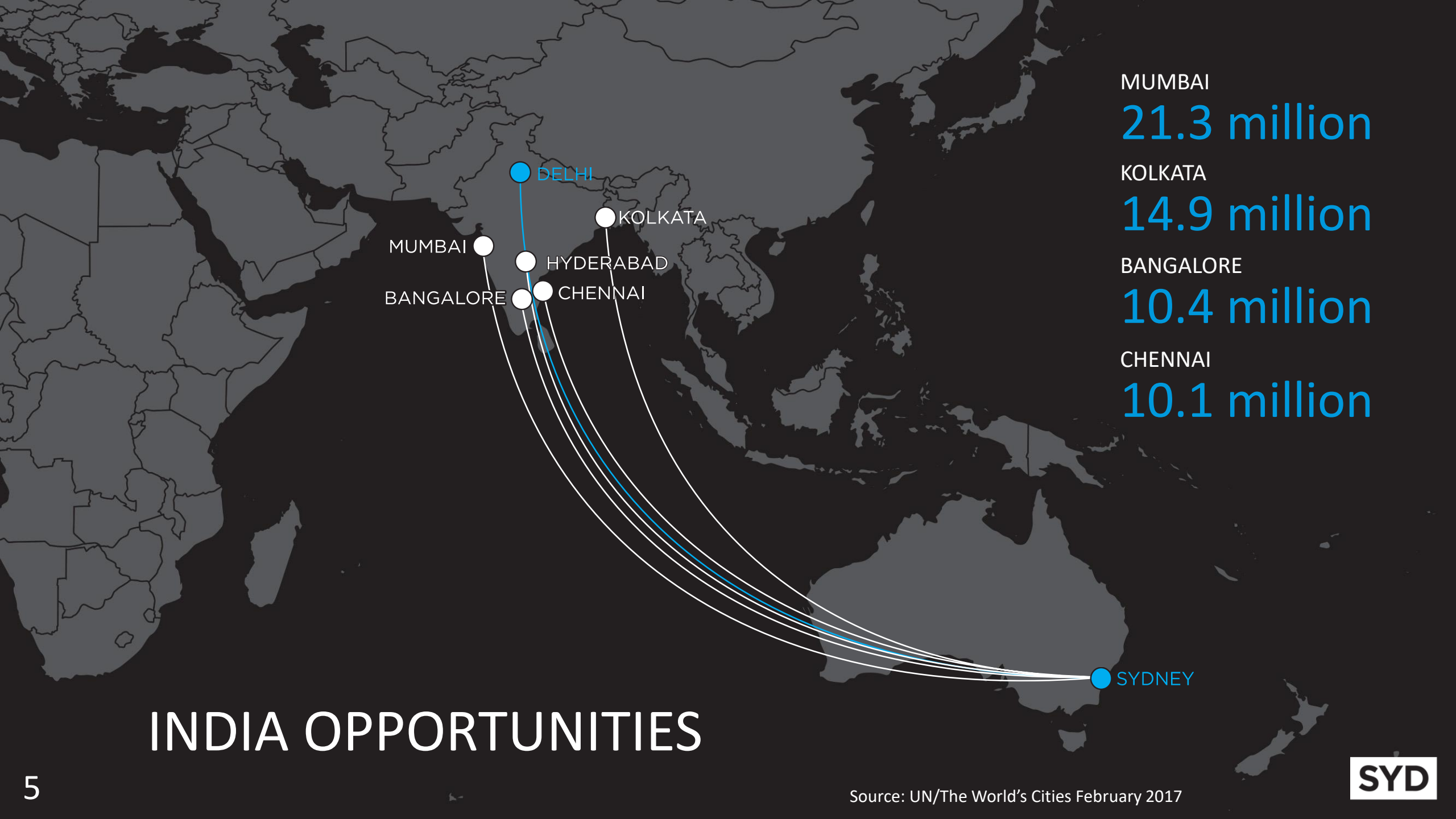


GROWTH IN MAINLAND CHINA



GLOBAL OPPORTUNITIES





MUMBAI
21.3 million

KOLKATA
14.9 million

BANGALORE
10.4 million

CHENNAI
10.1 million

INDIA OPPORTUNITIES

IMPACT ON SYDNEY AIRPORT

2007

MIX OF INBOUND PASSENGERS

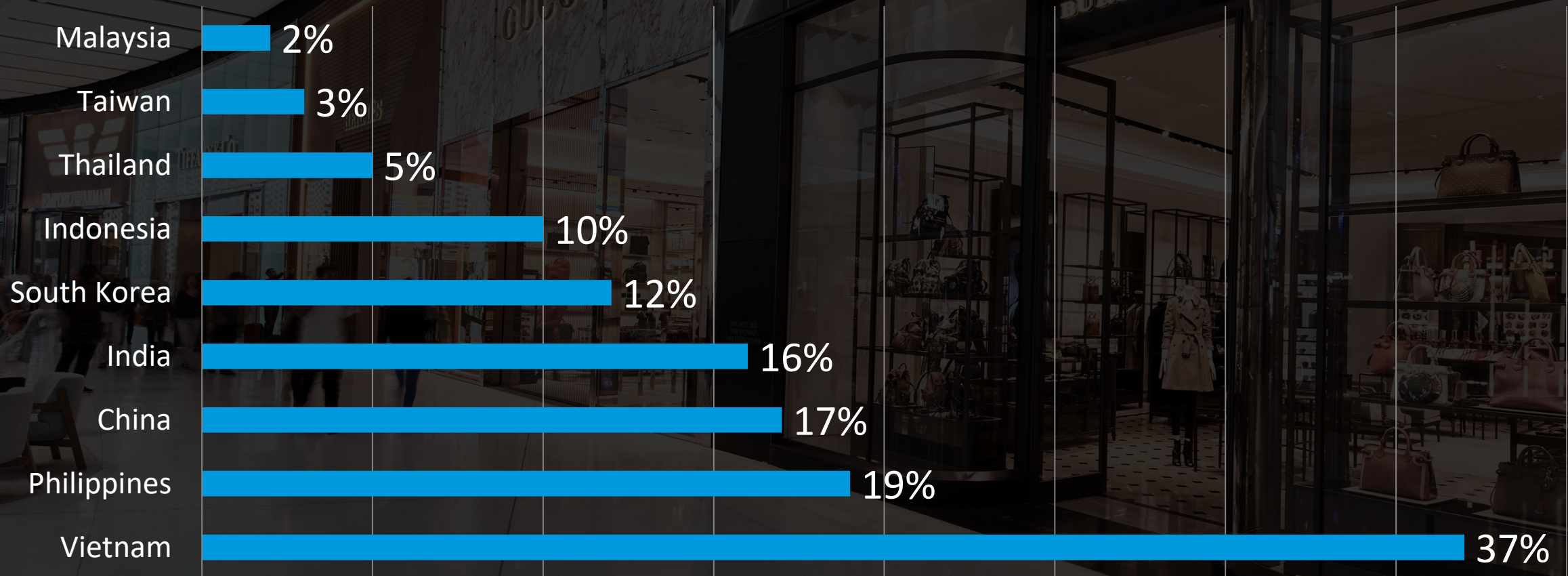
NEW ZEALAND	15%
UK	13%
USA	11%
CHINA	7%
SOUTH KOREA	7%
JAPAN	7%
GERMANY	3%
HONG KONG	3%
CANADA	3%
SINGAPORE	3%

2017

MIX OF INBOUND PASSENGERS

CHINA	17%
USA	12%
NEW ZEALAND	12%
UK	8%
SOUTH KOREA	5%
JAPAN	4%
INDIA	4%
HONG KONG	3%
SINGAPORE	3%
CANADA	2%

ASIA'S GROWTH BETWEEN 2016 AND 2017



2 / THE AFFORDABILITY AND ACCESSIBILITY OF TRAVEL



RISE OF THE LOW-COST CARRIER



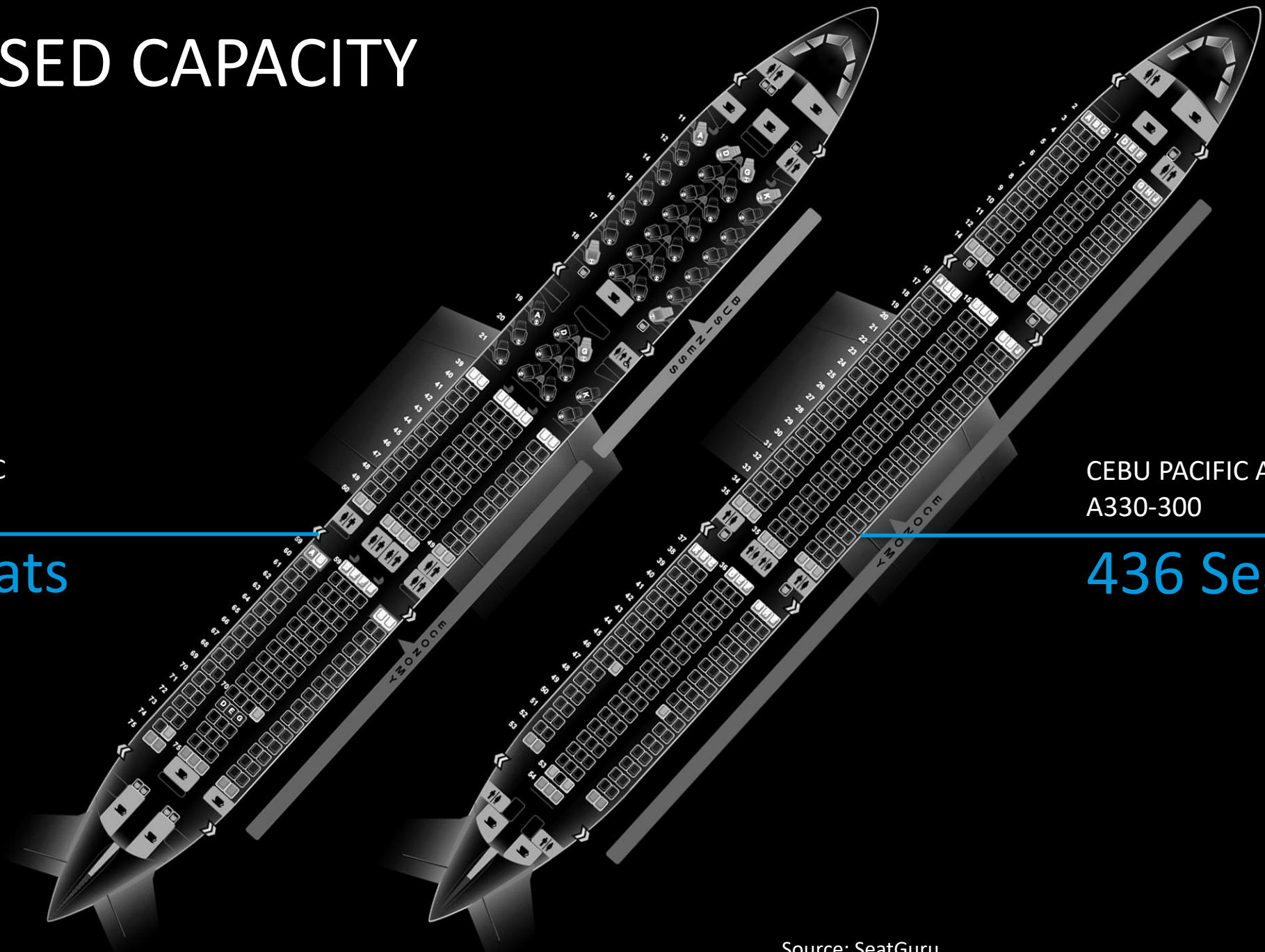
INCREASED CAPACITY

CATHAY PACIFIC
A330-300

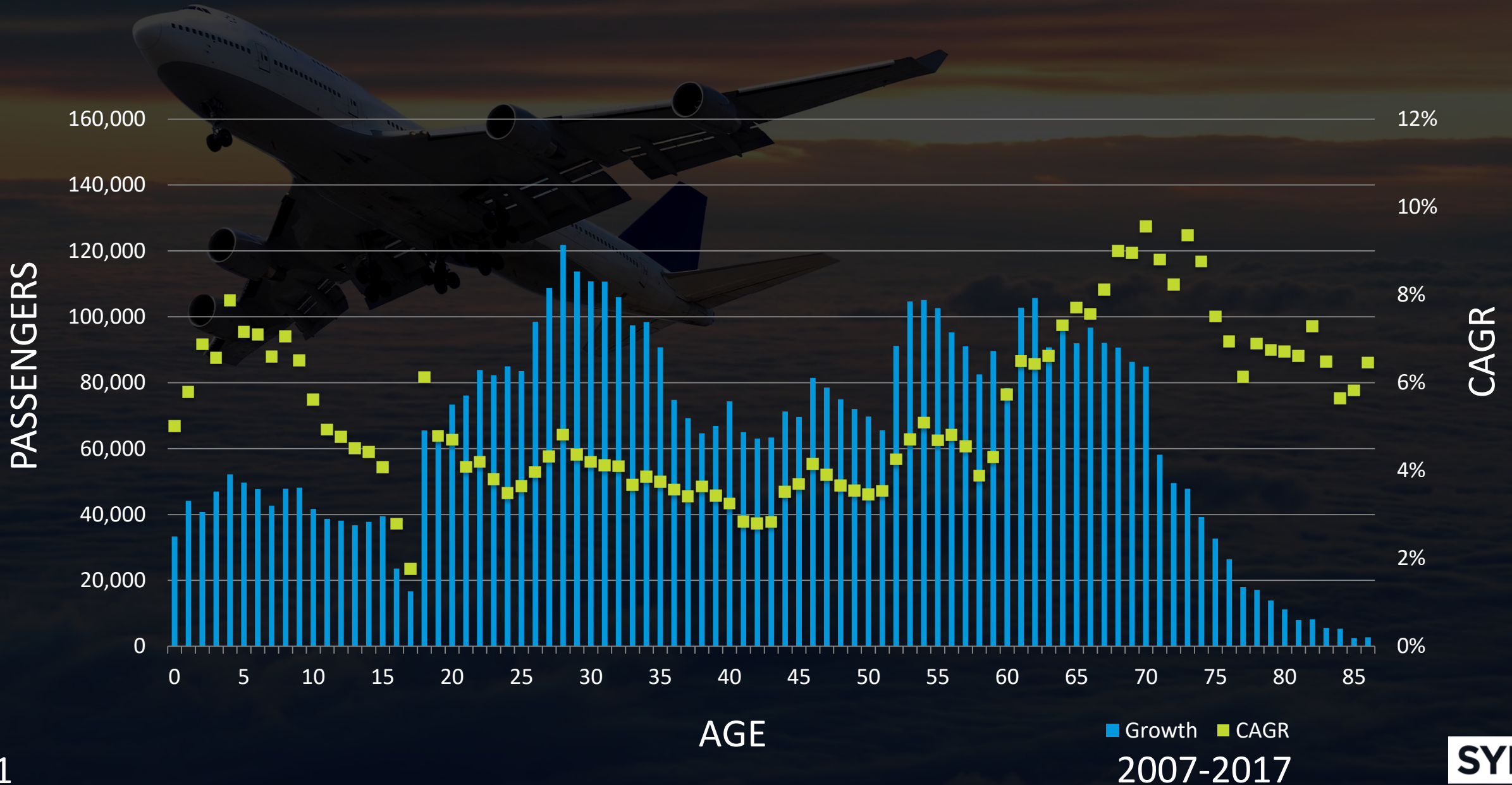
251 Seats

CEBU PACIFIC AIR
A330-300

436 Seats

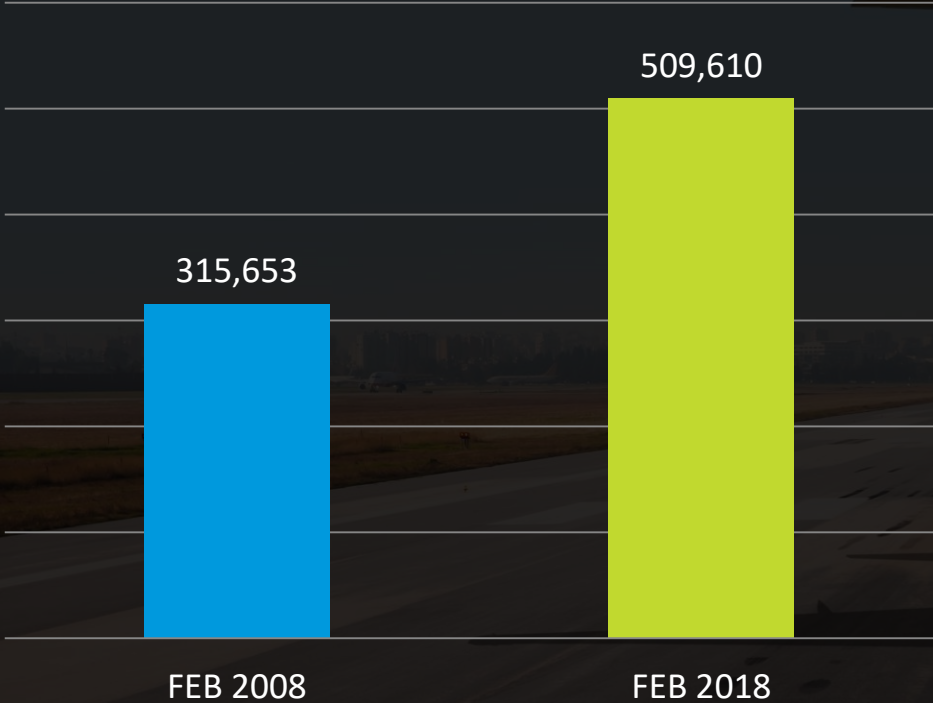


SPREADING DEMOGRAPHICS



THE CHANGING PURPOSE OF TRAVEL

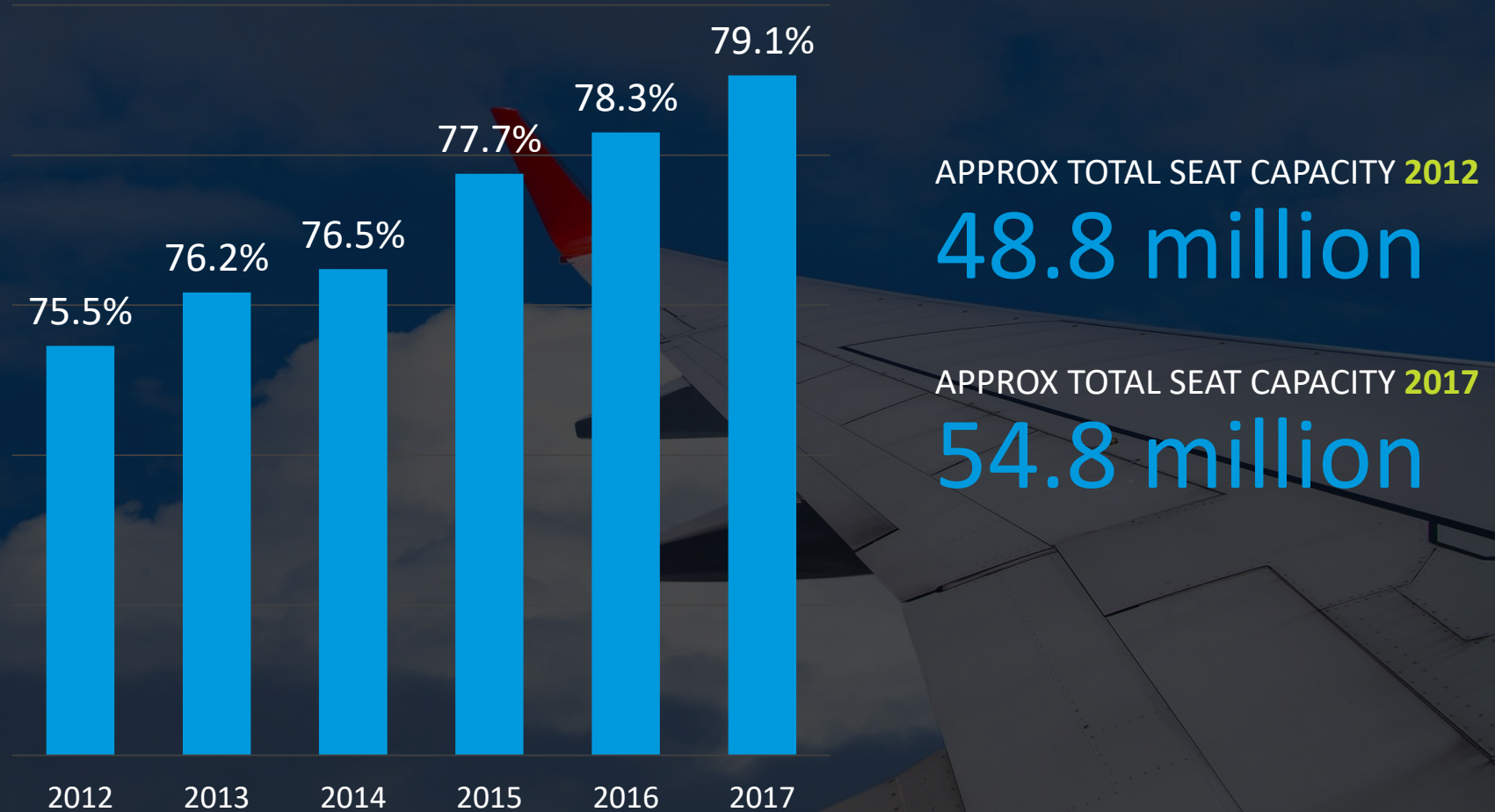
International student enrolments in Australia



Mix of international students (Feb 2018)



POSITIVE LOAD FACTORS & CAPACITY

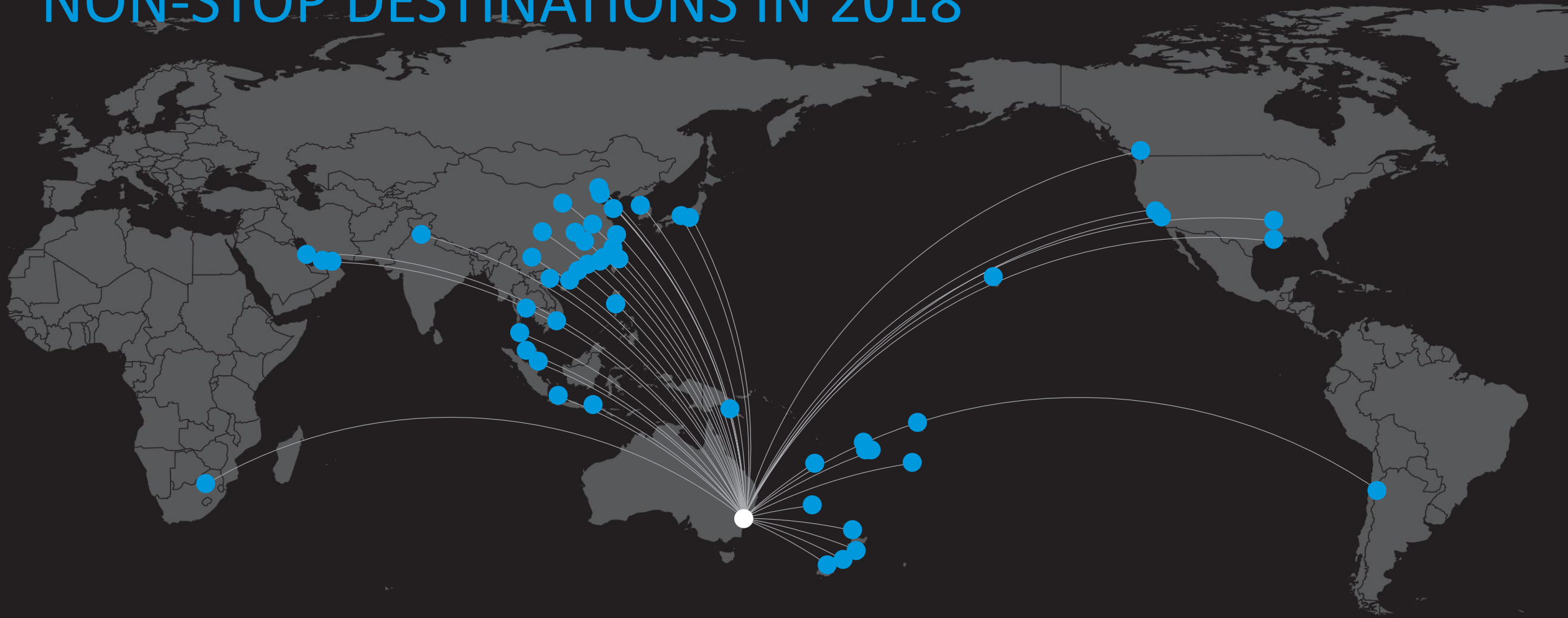




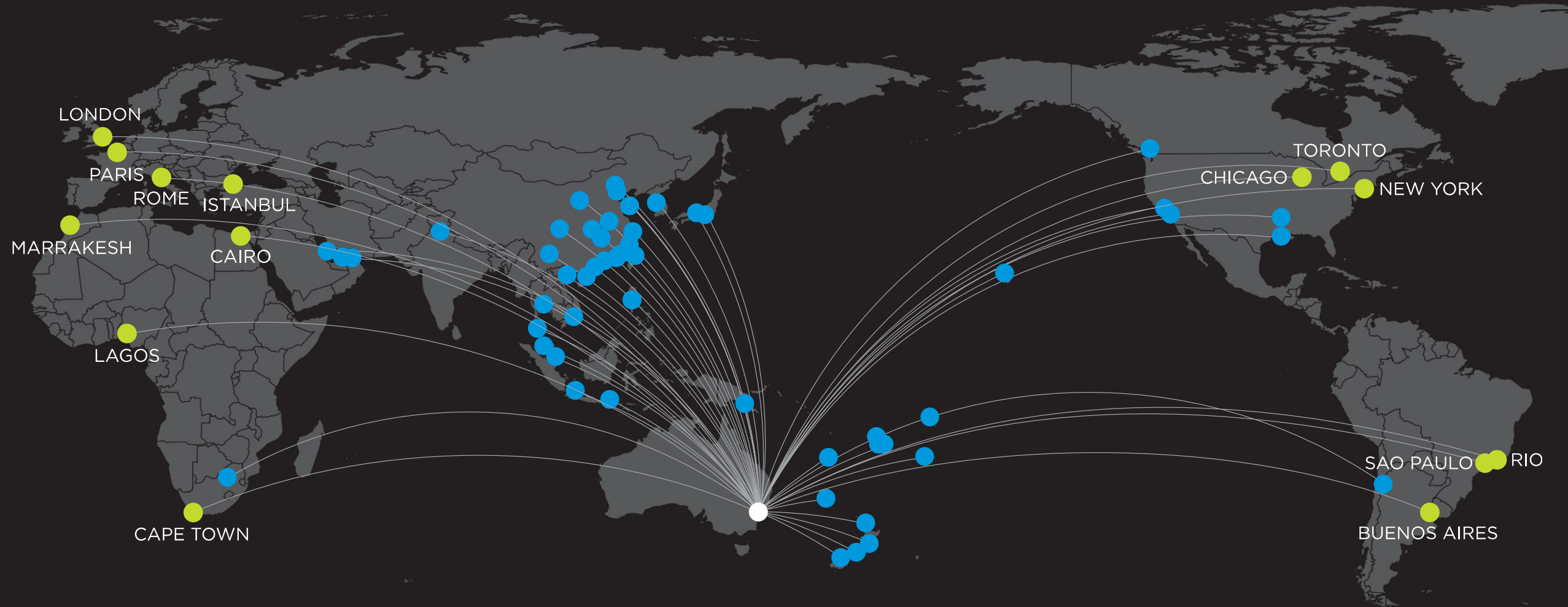
3 / THE CHANGING NATURE OF AIRCRAFT

MORE CONNECTED THAN EVER

NON-STOP DESTINATIONS IN 2018

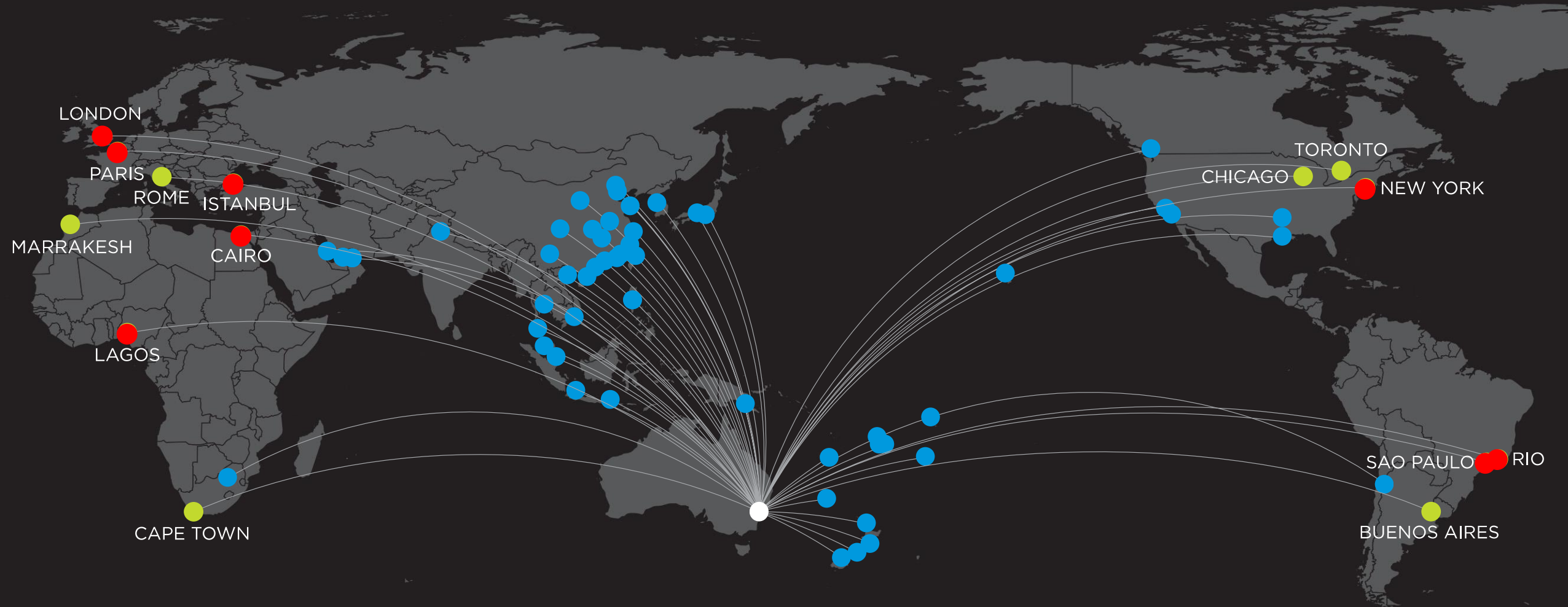


A WORLD OF POSSIBILITY



- Destinations currently served
- Future possibility

A WORLD OF POSSIBILITY



- Destinations currently served
- Future possibility
- Future possibility/larger population

WHAT DOES THIS MEAN FOR SYD?



28.8m

GROWTH IN PASSENGERS SINCE 1990

\$38bn

SYD'S OVERALL ECONOMIC CONTRIBUTION

338,500

FTE JOBS GENERATED OR FACILITATED BY SYD

