

NSW Domestic Aviation Performance

Top 66 competitive routes in Australia

Source: Bureau of Infrastructure, Transport and Regional Economics.

Year Ended September 2018

SEAT CAPACITY, FLIGHTS AND PASSENGER ARRIVALS

Chart 1 : Seat capacity and passenger traffic to New South Wales.

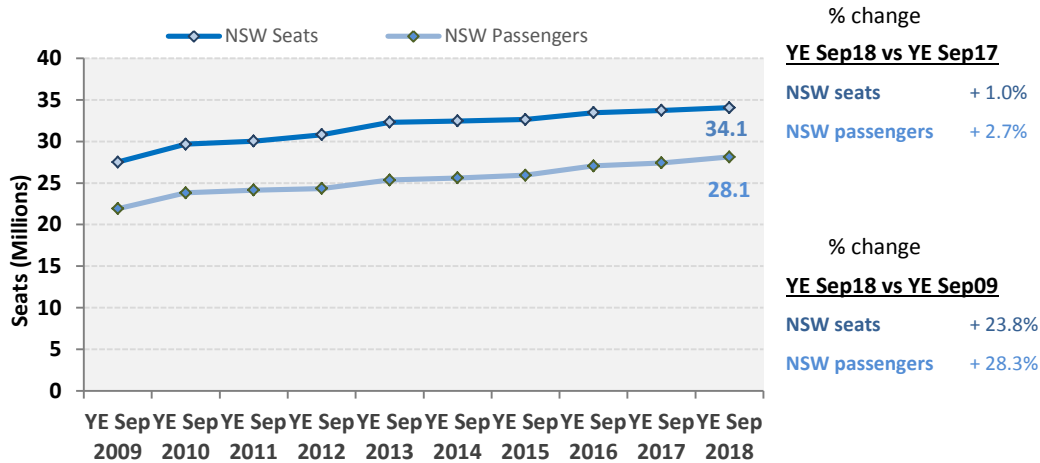


Chart 2 : Flight services to Sydney and New South Wales.

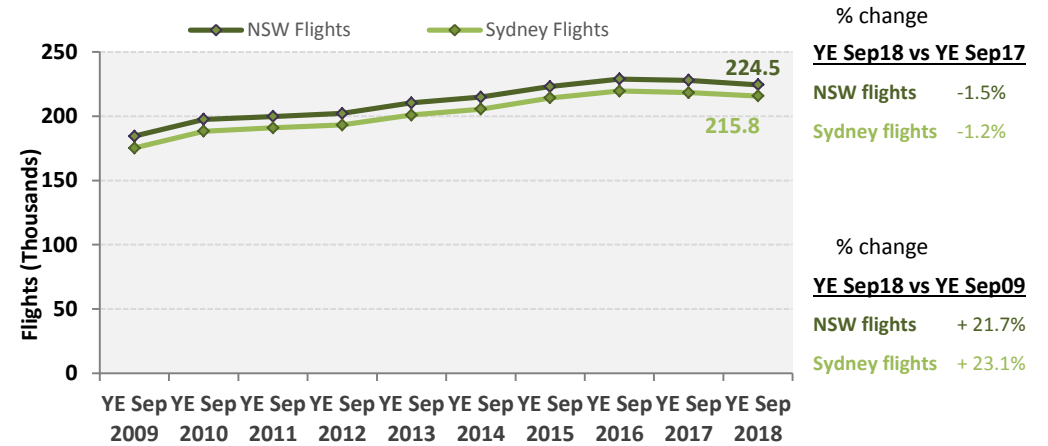
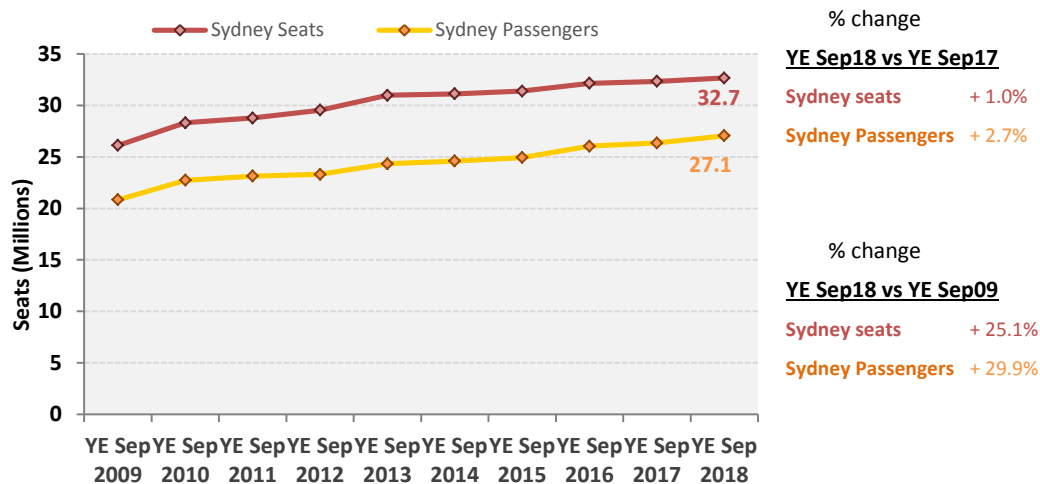


Chart 3 : Seat capacity and passenger traffic to Sydney.



In the year ended (YE) September 2018, NSW accounted for almost a half of the domestic aviation seat capacity in Australia's top 66 competitive routes (49%) or 34.1 million seats, up 1.0% on YE September 2017. In the last decade, NSW domestic aviation capacity in these routes increased by 23.8%. [Chart 1]

In the same year, there were 28.1 million passengers who arrived to and departed from NSW domestic airports, or 51% share of passengers in Australia's top routes. NSW recorded passenger growth of 2.7% on YE September 2017 and 28.3% increase in the last 10 years. [Chart 1]

In YE September 2018, NSW had 224,500 domestic flights in Australia's top routes, slightly less (down 1.5%) than in the previous year but 21.7% higher over the decade. Sydney accounted for 96% of those flights in YE September 2018. [Chart 2]

Sydney had a domestic aviation capacity of 32.7 million seats in Australia's top routes, up slightly by 1.0 % on the previous year and by 25.1% in the last 10 years. The number of passengers through Sydney's Domestic Airport reached 27.1 million, or 2.7% more passengers on the previous year and 29.9% higher in the last 10 years. [Chart 3]

For the top Australian routes, the average passenger load factor on Sydney domestic flights in YE September 2018 was 82.8%, slightly higher than the average for NSW (82.6%) or the national average (80.5%).

NSW INTRASTATE ROUTES

In YE September 2018, twenty-eight of the Top 66 Competitive routes in Australia were NSW routes. Of those routes, eight routes were intrastate.

Sydney to Ballina route was the fastest growing NSW intrastate route in both seats (522,000, up 5.9%) and passengers travelling in both directions in YE September 2018 (434,000, up 9.4%). Sydney to Ballina route had the highest share of NSW Intrastate routes in terms of capacity (20.7%) and passengers (23.3%).

Sydney to Coffs Harbour route was the second fastest growing NSW intrastate route with 476,000 seats (up 2.9%) and 344,000 passengers (up 0.1%). The route had the second highest share of the NSW Intrastate routes for both capacity and passengers (18.9% and 18.5%, respectively).

The passenger load factor was the highest for the Sydney to Ballina route (83.2%), followed by Port Macquarie route (78.3%) and Dubbo route (73.8%).

Table 1 shows **busiest NSW intrastate routes among the Top 66 Competitive routes in Australia** by seat and passenger numbers in both directions in YE September 2018.

Table 1: NSW busiest intrastate routes

SYDNEY to/from (two way traffic*)	Available seats YE Sep 2018 (000)	% share YE Sep 2018	Passengers YE Sep 2018 (000)	% share YE Sep 2018	Load Factor (%) [^]
Ballina	522	20.7%	434	23.3%	83.2%
Coffs Harbour	476	18.9%	344	18.5%	72.3%
Albury	316	12.5%	224	12.0%	70.8%
Tamworth	266	10.6%	176	10.2%	66.0%
Wagga Wagga	263	10.5%	182	10.1%	69.2%
Dubbo	258	10.2%	190	9.8%	73.8%
Port Macquarie	240	9.5%	188	9.4%	78.3%
Armidale	179	7.1%	124	6.6%	69.1%
Total NSW Intrastate routes	2,520	100%	1,862	100%	73.9%

* Traffic covers both directions of each city pair.

[^] Load factor: Kilometers travelled by paying passengers as a percentage of total available seat kilometers.

Chart 4: Busiest NSW intrastate routes to and from Sydney, by seat capacity.

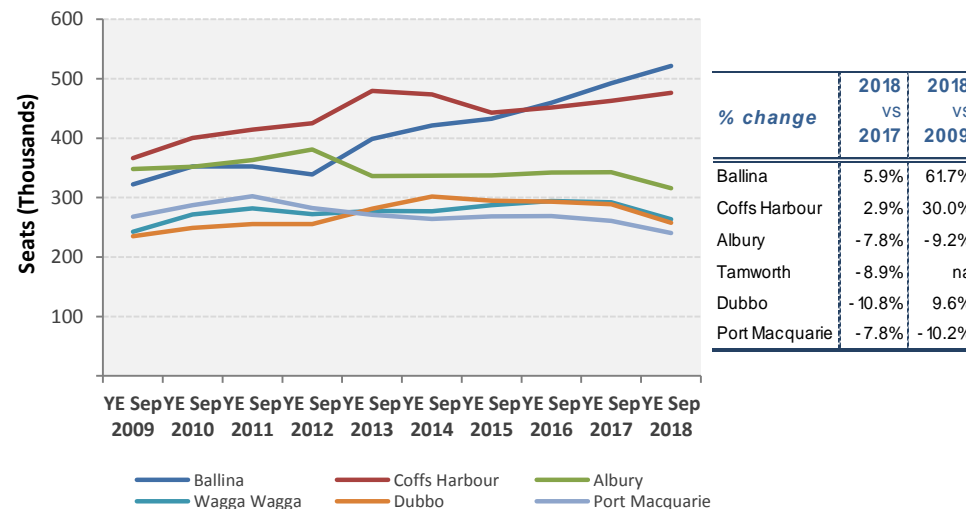
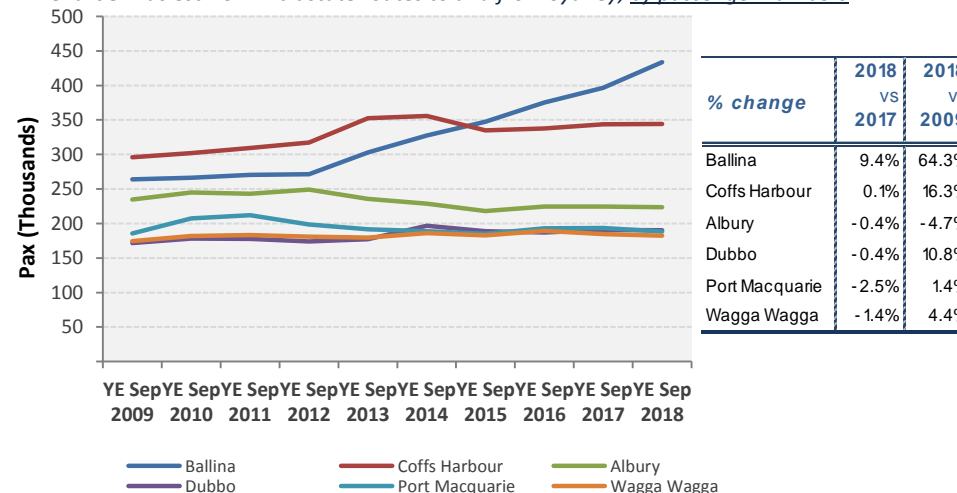


Chart 5: Busiest NSW intrastate routes to and from Sydney, by passenger numbers.



SYDNEY INTERSTATE ROUTES

Sydney had 17 interstate city pair routes in the Top 66 Competitive routes in Australia in YE September 2018. These routes accounted for 44% of the available seats and 45% of the passenger traffic in both directions.

Sydney to Melbourne remains top NSW Interstate route with over 10.8 million available seats (up 1.4% on YE September 2017) and nearly 9.3 million passengers on the route (up 3.1% on the previous year). The route also accounts for the highest proportions of seats and passengers of the top Sydney competitive routes (36.0% and 36.8%, respectively).

Sydney to Brisbane was the second highest route in terms of seats (5.8 million) and passenger traffic (4.8 million). The route accounts for 19.2% of seats and 19.1 % of passengers of the top Sydney competitive routes.

Table 2 below shows the busiest Sydney interstate routes among the Top 66 competitive routes in Australia by seats and passenger numbers in both directions in YE September 2018.

Table 2: Sydney busiest interstate routes

SYDNEY to/from (two way traffic*)	Available seats YE Sep 2018 (000)	% share YE Sep 2018	Passengers YE Sep 2018 (000)	% share YE Sep 2018	Load Factor (%)^
Melbourne	10,848	36.0%	9,280	36.8%	85.5%
Brisbane	5,788	19.2%	4,810	19.1%	83.1%
Gold Coast	3,175	10.5%	2,754	10.9%	86.8%
Adelaide	2,321	7.7%	1,914	7.6%	82.5%
Perth	2,061	6.8%	1,721	6.8%	83.5%
Cairns	1,353	4.5%	1,136	4.5%	83.9%
Canberra	1,297	4.3%	957	3.8%	73.8%
Hobart	845	2.8%	697	2.8%	82.5%
Sunshine Coast	764	2.5%	621	2.5%	81.3%
Darwin	426	1.4%	315	1.2%	74.0%
Launceston	332	1.1%	288	1.1%	86.6%
Hamilton Island	305	1.0%	203	0.8%	66.6%
Ayers Rock	247	0.8%	197	0.8%	79.8%
Townsville	210	0.7%	166	0.7%	79.1%
Total Sydney Interstate routes	30,140	100%	25,197	100%	83.3%
Total Top Competitive routes in Australia	68,911	-	55,470	-	80.5%

* Traffic covers both directions of each city pair.

^ Load factor: Kilometers travelled by paying passengers as a percentage of total available seat kilometers.

Chart 6: Busiest NSW intrastate routes to and from Sydney, by seat capacity.

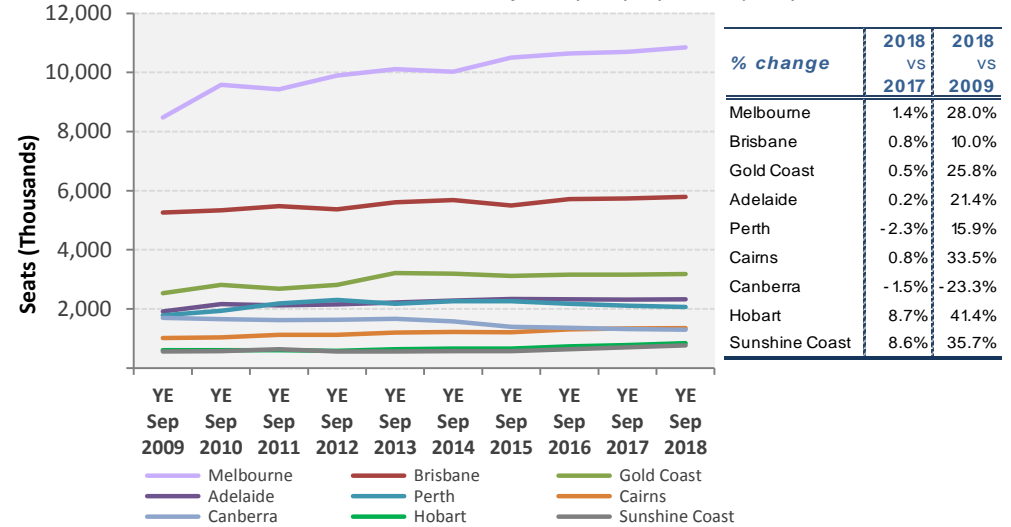


Chart 7: Busiest NSW intrastate routes to and from Sydney, by passenger numbers.

