

NSW Domestic Aviation Performance

Top 65 competitive routes in Australia

Source: Bureau of Infrastructure, Transport and Regional Economics.

SEAT CAPACITY, FLIGHTS AND PASSENGER ARRIVALS

Chart 1 : Yearly seat capacity and passenger traffic to and from Sydney and New South Wales.

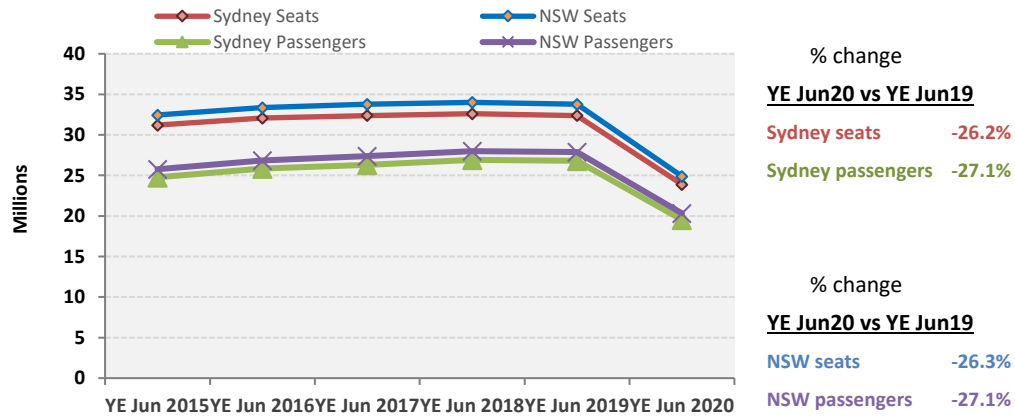
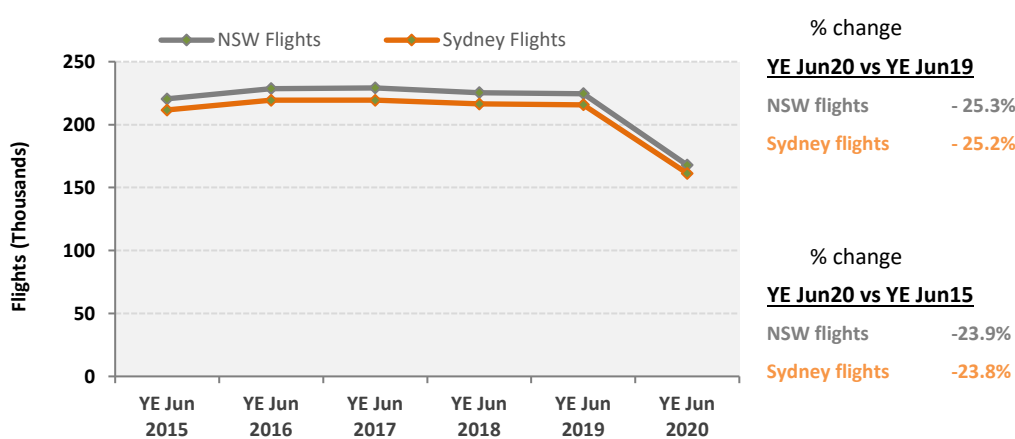


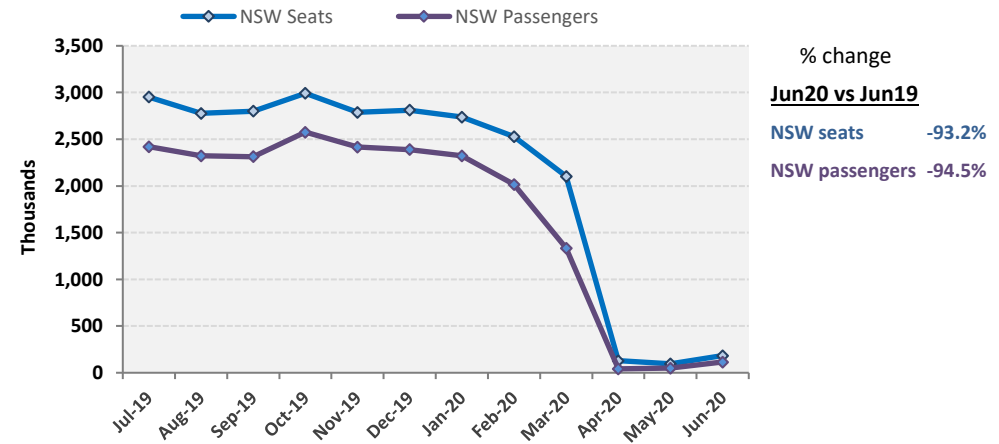
Chart 3 : Yearly flight services to and from Sydney and New South Wales.



Year ended June 2020

All the statistics in this report relate to Australia's top 65 competitive routes and NSW's performance in the year ended (YE) June 2020 in comparison to the past year and five years prior.

Chart 2 : Monthly seat capacity and passenger traffic to and from New South Wales.



With the implementation of travel restrictions and domestic state border closures due to the COVID-19 pandemic from late March 2020, domestic aviation services significantly declined in YE June 2020.

In terms of **flights**, NSW had 167,800 domestic services for the year, of which 96% were flights to Sydney. The State's share of Australia flights was 48%. There was a decline in volume of flights to and from NSW and Sydney on YE June 2019 (down 25% each). [Chart 3]

With 24.9 million domestic **seats** and 20.3 million domestic **passengers**, NSW accounted for almost a half (48%) of Australia's aviation capacity and half of its passengers in YE June 2020. Sydney contributed 96% of NSW seats and passengers for the year. Volume of seats and passengers in NSW and Sydney both dropped by at least a quarter compared to previous year. [Chart 1]

The average **passenger load factor** on Sydney domestic flights for the year was 81.7%, slightly higher than the average for NSW (81.6%) and the national average (79.4%).

There was a massive decline in the volume of NSW seats and passengers **from April 2020**. Compared to the same month in 2019, the volume of seats declined by 95.4% in April, 96.6% in May and 93.2% in June. Consequently, the number of passengers also sharply fell by 98.2% in April 2020, 97.8% in May 2020 and 94.5% in June 2020 [Chart 2]. With the easing of some travel restrictions, there were slight increases in seats, passengers and passenger load factors in May and June 2020 compared to April. Intrastate travel was allowed across NSW from 1

NSW INTRASTATE ROUTES

In YE June 2020, twenty five of the Top 65 Competitive routes in Australia were NSW routes. Of those, eight routes were intrastate.

All NSW intrastate routes marked a decline in both seats and passengers for the year. The volume of available seats and passengers travelling in both directions declined for total NSW intrastate routes (down 25.5% and down 26.9%, respectively).

Sydney to Ballina has been the top NSW intrastate route, though its volume of available seats and passengers travelling in both directions declined for the year (down 23.1% and down 23.2%, respectively). Sydney to Ballina route had the highest share of NSW Intrastate routes in terms of capacity and passengers.

Sydney to Coffs Harbour route was the 2nd most in demand NSW intrastate route. It also recorded decline in both seats and passengers (down 30.4% and down 29.1%, respectively).

The passenger load factor was the highest for the Sydney to Ballina route (83.1%), followed by

Table 1 shows **busiest NSW intrastate routes among the Top 65 Competitive routes in Australia** by seat and passenger numbers in both directions in YE June 2020.

Table 1: NSW busiest intrastate routes

SYDNEY to/from (two way traffic*)	Available seats YE Jun 2020 (000)	% share YE Jun 2020	Passengers YE Jun 2020 (000)	% share YE Jun 2020	Load Factor (%) [^]
Ballina	400	21.2%	332	24.7%	83.1%
Coffs Harbour	320	17.0%	235	17.5%	73.4%
Albury	238	12.6%	164	12.2%	68.8%
Dubbo	205	10.9%	132	9.8%	64.2%
Wagga Wagga	202	10.7%	131	9.7%	64.9%
Tamworth	197	10.5%	126	9.4%	63.9%
Port Macquarie	190	10.1%	138	10.2%	72.5%
Armidale	132	7.0%	88	6.5%	66.1%
Total NSW Intrastate routes	1,885	100%	1,345	100%	71.4%

* 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.

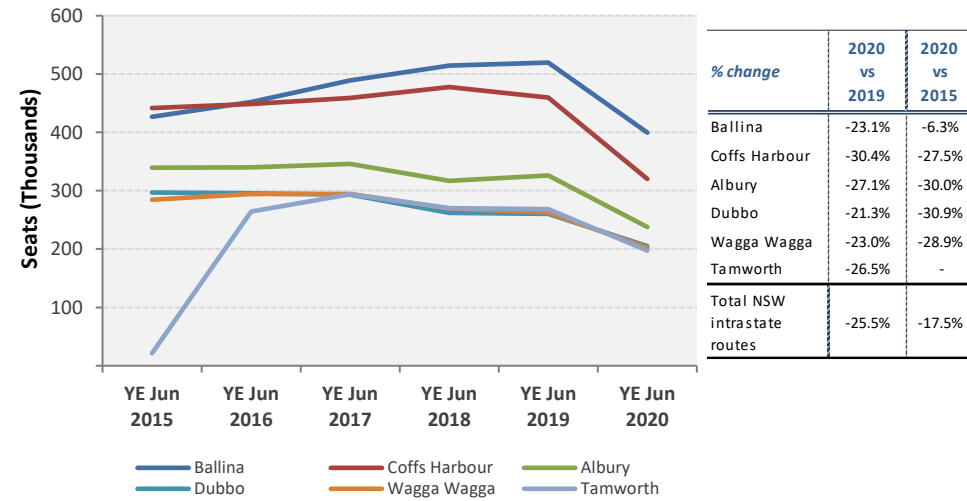
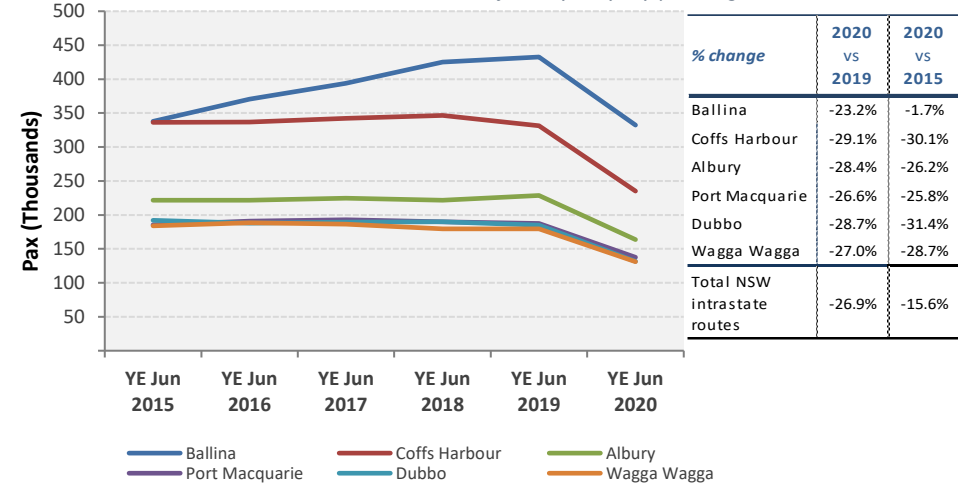


Chart 5: Busiest NSW intrastate routes to and from Sydney, by passenger numbers.



SYDNEY INTERSTATE ROUTES

Sydney had 15 interstate city pair routes in the Top 65 Competitive routes in Australia in YE June 2020. These routes accounted for 43% of the available seats and 45% of the passenger traffic in both directions.

All NSW interstate routes marked a decline in both seats and passengers for the year. The volume of available seats and passengers travelling in both directions declined for total NSW interstate routes (down 26.4% and down 27.1%, respectively).

Sydney to Melbourne remains the top NSW Interstate route in terms of seats and passengers, followed by **Sydney to Brisbane**.

The Sydney to Melbourne route suffered a decline for the year in both seats (down 26.6%) and passengers (down 28.2%). The route though accounts for the highest proportion of seats and passengers of the top Sydney competitive routes, and the 5th highest load factor.

The **Sydney to Gold Coast** ranked third in seats and passengers but highest in load factor at

Table 2 below shows the busiest Sydney interstate routes among the Top 65 competitive routes in Australia by seats and passenger numbers in both directions in YE June 2020.

Table 2: Sydney interstate routes

SYDNEY to/from (two way traffic*)	Available seats YE Jun 2020 (000)	% share YE Jun 2020	Passengers YE Jun 2020 (000)	% share YE Jun 2020	Load Factor (%)^
Melbourne	7,920	36.0%	6,603	36.3%	83.4%
Brisbane	4,312	19.6%	3,533	19.4%	81.9%
Gold Coast	2,342	10.6%	2,027	11.1%	86.5%
Adelaide	1,647	7.5%	1,355	7.5%	82.3%
Perth	1,539	7.0%	1,266	7.0%	82.3%
Cairns	933	4.2%	778	4.3%	83.3%
Canberra	893	4.1%	664	3.7%	74.4%
Hobart	672	3.1%	546	3.0%	81.3%
Sunshine Coast	564	2.6%	476	2.6%	84.4%
Darwin	286	1.3%	220	1.2%	76.8%
Launceston	252	1.1%	216	1.2%	85.7%
Hamilton Island	227	1.0%	174	1.0%	76.5%
Ayers Rock	183	0.8%	130	0.7%	71.3%
Townsville	157	0.7%	128	0.7%	81.5%
Proserpine	81	0.4%	70	0.4%	86.2%
Total Sydney Interstate routes	22,009	100%	18,185	100%	82.5%
Total Top Competitive routes in Australia	51,403	-	40,820	-	79.4%

* 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 interstate routes to and from Sydney, by seat capacity.

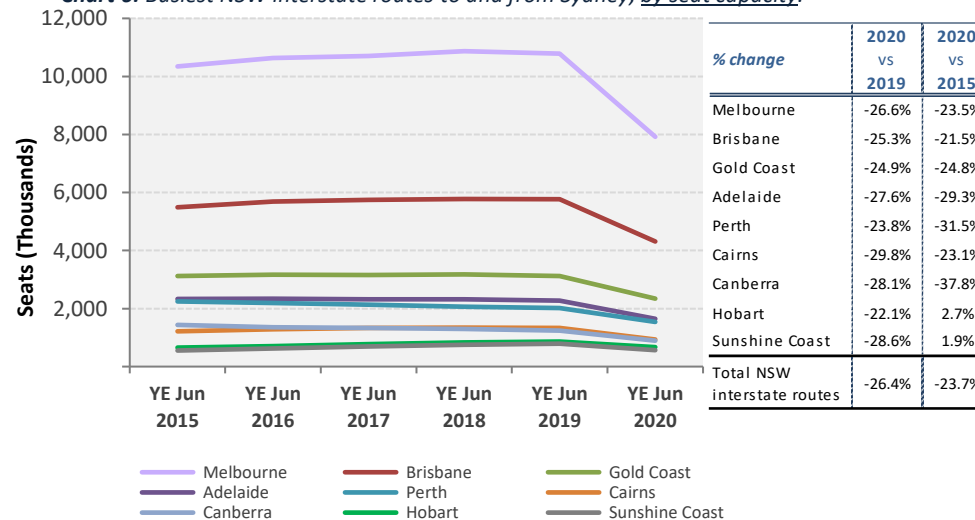


Chart 7: Busiest NSW interstate routes to and from Sydney, by passenger numbers.

