

NSW International Aviation Performance

Year ended June 2020

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

Arrivals source: Visitor Arrival Statistics, Tourism Research Australia.

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

Chart 1: Yearly inbound seat capacity and short-term visitor arrivals to NSW and Australia.

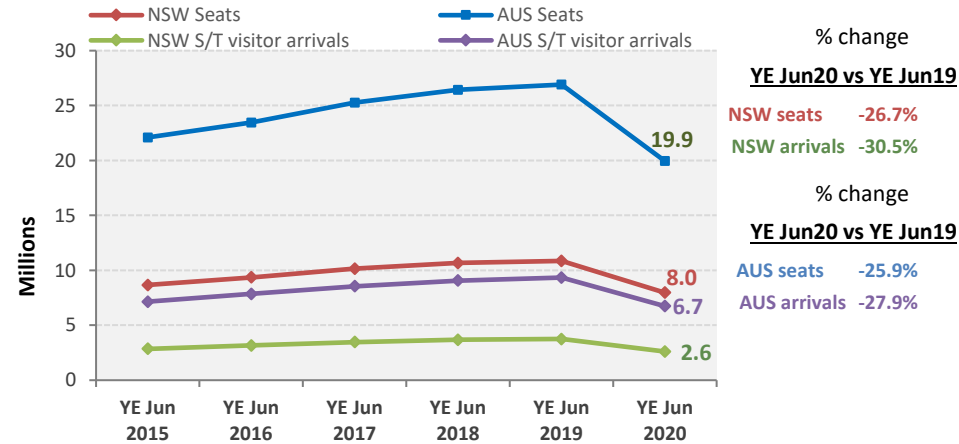


Chart 2: Inbound flights to NSW and Australia.

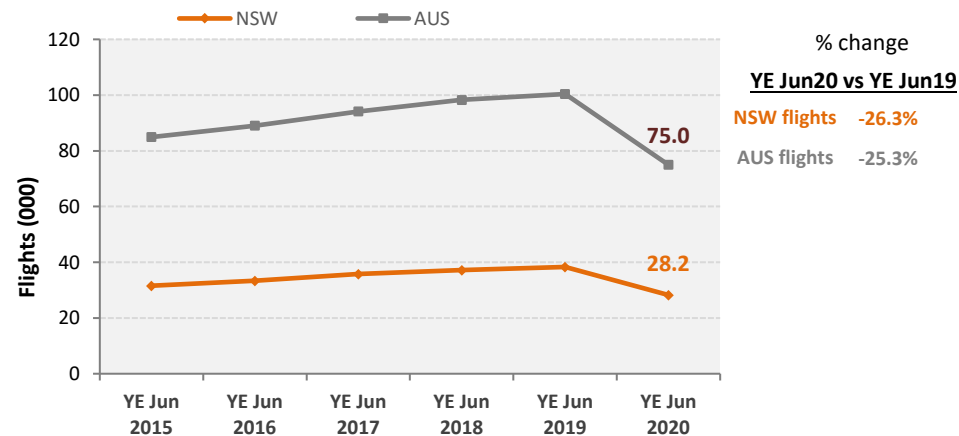
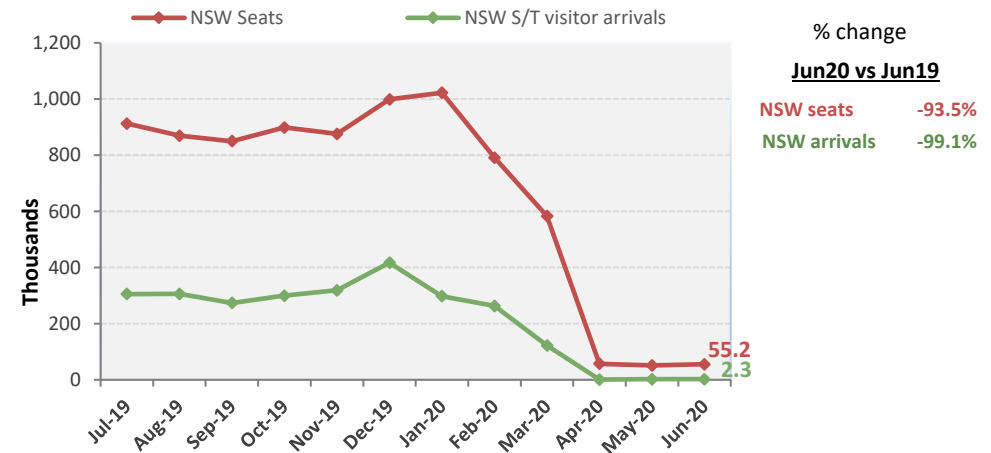


Chart 3: Monthly inbound seat capacity and short-term visitor arrivals to NSW



From 20 March 2020, Australia closed its international borders due to the COVID-19 pandemic. This report shows the impact on international aviation capacity and visitor arrivals.

NSW had the highest share of the inbound seat capacity in Australia (40%) with a total of 8.0 million seats in the year ended (YE) June 2020, down 26.7 per cent on the year prior. NSW received 2.6 million short-term visitor arrivals, down 30.5% on YE June 2019 [Chart 1].

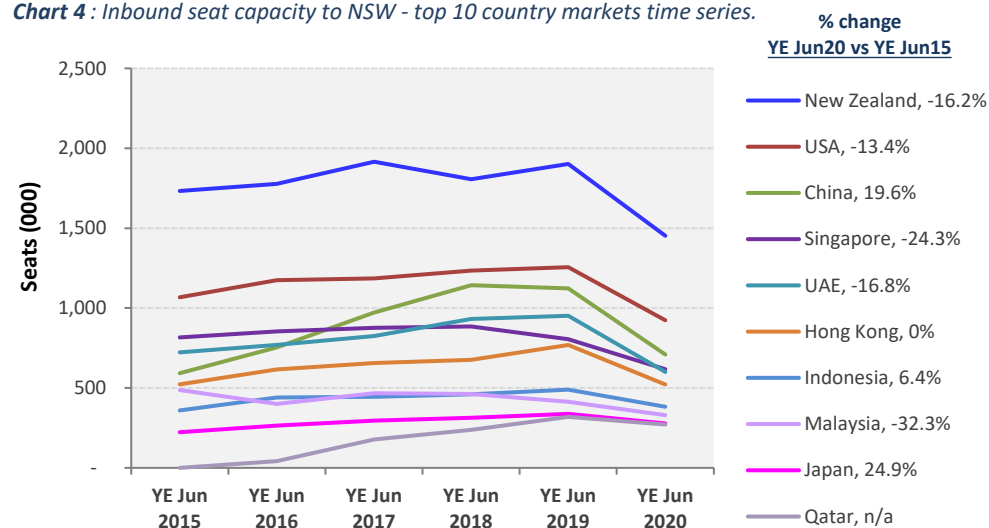
The number of inbound flights to NSW was 28,200, down 26.3% on the previous year and by 10.5% in the last five years. NSW had the highest share (38%) of all flights to Australia for the year. [Chart 2]

The average passenger load factor on all international flights that operated to and from NSW (Sydney and Newcastle Airports) in YE June 2020 was 76.9%, which was 1.4% pts lower than in the previous year. NSW load factor for the year was slightly below the national average of 78.4%.

With the closure of national borders, 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 93.5% in June. Consequently, the number of passengers also sharply fell by 99.1% in June 2020 [Chart 3].

INBOUND SEAT CAPACITY TO NSW BY ORIGIN COUNTRY

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



In YE June 2020, New Zealand had the highest number of inbound seats to NSW (1.5 million seats), followed by USA and China.

International seat capacity from all origin countries to NSW declined as compared to volume in YE June 2019. New Zealand recorded the biggest drop in aviation seat capacity (down 450,300), followed by China and United Arab Emirates.

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.

In June quarter 2020, the volume of available seats to NSW declined by 2.4 million (-93.6%) to reach 163,400 seats as compared to June QTR 2019. New Zealand to NSW recorded the highest decline (down 448,400 seats), followed by USA and China.

The number of inbound flights to NSW in June quarter 2020 was 580, down 93.7% on the same quarter in the previous year.

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

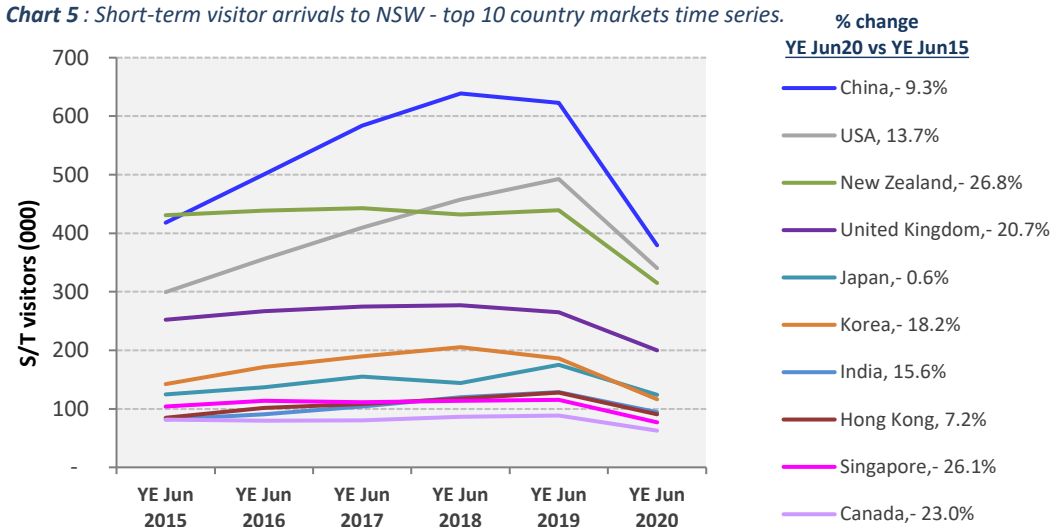
TOP COUNTRY MARKETS TO NSW	Inbound seats YE Jun 2020 (000) (1)	% change on YE Jun 2019	Change in volume on YE Jun 2019 (000)	% share of total seats to NSW YE Jun 2020 (2)	% share of total seats to NSW YE Jun 2019	Share of total NSW seats by country (Top carriers) YE Jun 2020
New Zealand	1,452.5	-23.7%	-450.3	18.2%	17.5%	1. Air New Zealand (35%) 2. Qantas Airways (33%) 3. Virgin Australia (14%) 4. Emirates (10%) 5. Jetstar (8%)
USA	923.7	-26.5%	-332.2	11.6%	11.6%	1. Qantas Airways (39%) 2. United Airlines (22%) 3. Virgin Australia (9%) 4. Delta Air Lines (8%) 5. American Airlines (8%)
China	708.8	-36.9%	-414.6	8.9%	10.3%	1. China Eastern Airlines (28%) 2. China Southern Airlines (25%) 3. Qantas Airways (14%) 4. Air China (13%) 5. Xiamen Airlines (8%)
Singapore	617.2	-23.3%	-187.2	7.7%	7.4%	1. Singapore Airlines (74%) 2. Scoot Tigerair (14%) 3. Qantas Airways (12%)
UAE	600.6	-36.9%	-351.3	7.5%	8.8%	1. Emirates (63%) 2. Etihad Airways (37%)
Hong Kong	521.8	-32.2%	-247.3	6.6%	7.1%	1. Cathay Pacific Airways (59%) 2. Qantas Airways (29%) 3. Virgin Australia (12%)
Indonesia	382.5	-21.9%	-107.0	4.8%	4.5%	1. Qantas Airlines (34%) 2. Garuda Indonesia (26%) 3. Jetstar (22%) 4. Virgin Australia (17%)
Malaysia	329.8	-20.2%	-83.3	4.1%	3.8%	1. Malaysia Airlines (47%) 2. AirAsia (42%) 3. Malindo Air (11%)
Japan	278.7	-17.6%	-59.3	3.5%	3.1%	1. Qantas Airways (54%) 2. All Nippon Airways (27%) 3. Japan Airlines (19%)
Qatar	270.4	-15.3%	-48.7	3.4%	2.9%	1. Qatar Airways (100%)
Total to NSW	7,964.7	-26.7%	-2,894.0	100%	100%	1. Qantas Airways (24%) 2. Air New Zealand (7%) 3. Emirates (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 YE Jun 2020, New Zealand accounted for 18.2% 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 been NSW's number one market in short-term visitor arrivals since 2015. In YE June 2020, there were over 379,000 arrivals from China to the State, followed by USA and New Zealand.

Short-term arrivals to NSW suffered a decline from all markets as compared to previous year. China recorded the biggest drop in arrivals (down 243,100 arrivals), followed by USA and New Zealand.

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

In June quarter 2020, short-term arrivals to NSW declined by 0.8 million or by 99.4% with just over 5,000 arrivals as compared to June quarter 2019. Short-term arrivals from China marked the biggest decline (down 119,700 arrivals), followed by USA and New Zealand.

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

TOP COUNTRY MARKETS TO NSW	S/T visitor arrivals YE Jun 2020 (000) (1)	% change on YE Jun 2019	Change in volume on YE Jun 2019 (000)	% share of S/T visitor arrivals to NSW YE Jun 2020 (2)	% share of S/T visitor arrivals to NSW YE Jun 2019	Share of total short-term visitor arrivals to NSW by country (Top carriers) YE Jun 2020
China	379.4	-39.1%	-243.1	14.5%	16.6%	1. China Eastern Airlines (21%) 2. China Southern Airlines (17%) 3. Qantas Airways (15%) 4. Air China (11%) 5. Cathay Pacific Airways (6%)
USA	340.6	-30.9%	-152.1	13.1%	13.1%	1. Qantas Airways (25%) 2. United Airlines (21%) 3. Delta Air Lines (11%) 4. American Airlines (10%) 5. Virgin Australia (9%)
New Zealand	315.0	-28.2%	-124.0	12.1%	11.7%	1. Air New Zealand (53%) 2. Qantas Airways (21%) 3. Virgin Australia (9%) 4. Jetstar (Australia) (6%) 5. LATAM Airlines (4%)
United Kingdom	199.9	-24.6%	-65.2	7.7%	7.1%	1. Emirates (17%) 2. Qantas Airways (15%) 3. British Airways (12%) 4. Singapore Airlines (11%) 5. Etihad (9%)
Japan	123.9	-29.3%	-51.3	4.7%	4.7%	1. Qantas Airways (40%) 2. All Nippon Airways (Japan) (20%) 3. Japan Airlines (15%) 4. Asiana Airlines (Korea) (6%) 5. Korean Airlines (4%)
Korea	116.2	-37.5%	-69.7	4.5%	5.0%	1. Asiana Airlines (Korea) (37%) 2. Korean Airlines (34%) 3. Qantas Airways (5%) 4. Emirates (3%) 5. Air Asia X (2%)
India	94.6	-26.4%	-33.9	3.6%	3.4%	1. Singapore Airlines (24%) 2. Air India (19%) 3. Malaysian Airline (19%) 4. Air Asia X (9%) 5. Thai Airways International (6%)
Hong Kong	90.8	-28.9%	-36.9	3.5%	3.4%	1. Cathay Pacific Airways (46%) 2. Qantas Airways (30%) 3. Virgin Australia (12%) 4. Singapore Airlines (2%) 5. China Southern Airlines (1%)
Singapore	76.9	-33.3%	-38.4	2.9%	3.1%	1. Singapore Airlines (47%) 2. Qantas Airways (21%) 3. Tiger Airways (16%) 4. British Airways (7%) 5. Air New Zealand (1%)
Canada	62.7	-29.2%	-25.8	2.4%	2.4%	1. Air Canada (40%) 2. Qantas Airways (16%) 3. United Airlines (9%) 4. Air New Zealand (7%) 5. Virgin Australia (6%)
Total to NSW	2,608.6	-30.5%	-1,146.2	100%	100%	1. Qantas Airways (19%) 2. Air New Zealand (9%) 3. Singapore Airlines (6%) 4. Emirates (5%) 5. Cathay Pacific Airways (HK) (5%)

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

NOTE: (2) read this as (example) in the YE Jun 2020, 14.5% of total international short-term visitor arrivals to NSW were from China.