

NSW Domestic Aviation Performance

Top 57 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.

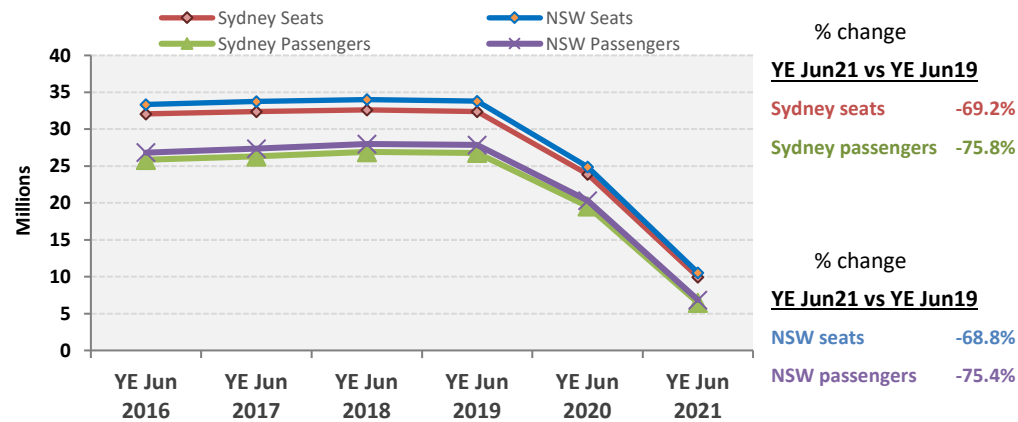
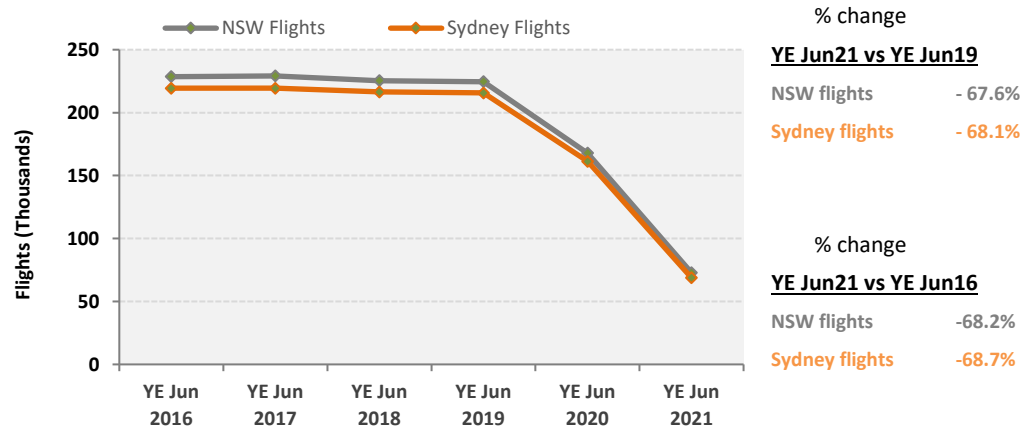


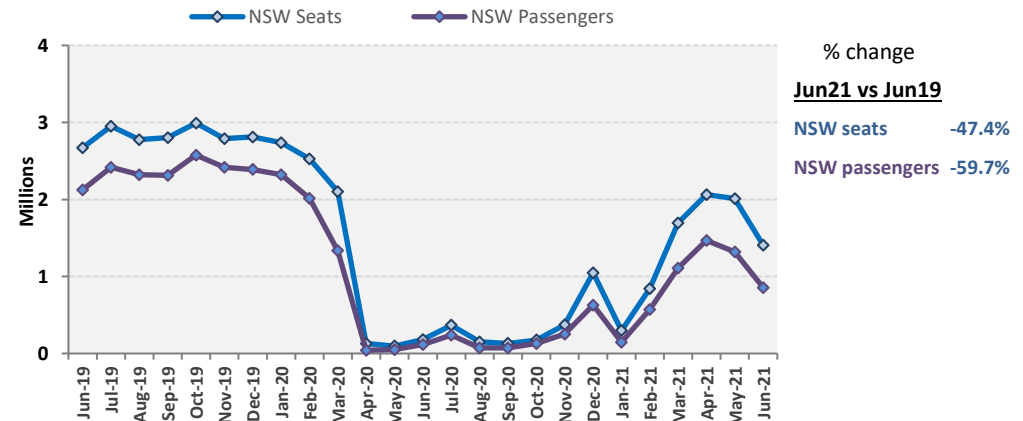
Chart 3: Yearly flight services to and from Sydney and New South Wales.



Year ended June 2021

All the statistics in this report relate to Australia's top 57 competitive routes and NSW's performance in the year ended (YE) June 2021 in comparison to YE June 2019 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 from April 2020.

In terms of **flights**, NSW had 72,802 domestic services for the year, of which 94% were flights to Sydney. The State's share of Australia flights was 40%. There was a significant decline in volume of flights to and from NSW and Sydney as compared to YE June 2019 (down 68% each). [Chart 3]

With 10.6 million domestic **seats** and 6.9 million domestic **passengers**, NSW accounted for over a third of Australia's aviation capacity and passengers (41% and 40%, respectively) in YE June 2021. Sydney contributed to 94% of NSW seats and 95% of passengers for the year. Volume passengers in NSW and Sydney both dropped by at least a two-third compared to previous year. [Chart 1]

The average **passenger load factor** on Sydney domestic flights for the year was 65.1%, which was similar to the average for NSW (65.0%) and the national average (65.4%).

With the easing of some travel restrictions, there were increases in seats, passengers and passenger load especially during school holiday months. Following a peak in seats and passengers during the school and Easter long weekend in April 2021, the seats and passengers declined in May 2021. With the rising number of COVID-19 cases during late June and the resultant restrictions, the services further declined in June 2021. Compared to the same month in 2019, the volume of seats declined by 47.4% in June 2021, and consequently the number of passengers also sharply fell by 59.7%. [Chart 2]

NSW INTRASTATE ROUTES

In YE June 2021, twenty of the Top 57 Competitive routes in Australia were NSW routes. Of those, six routes were intrastate.

All NSW intrastate routes, except Sydney to Ballina marked a decline in both seats and passengers for the year as compared to YE June 2019. The volume of available seats and passengers travelling in both directions declined for total NSW intrastate routes (down 56.5% and down 59.7%, respectively).

Sydney to Ballina has been the top NSW intrastate route, and its volume of available seats and passengers travelling in both directions increased for the year as compared to YE June 2019 (up 32.2% and up 17.8%, 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 recorded decline in both seats and passengers (down 66.9% and down 72.5%, respectively).

The passenger load factor was the highest for the Sydney to Ballina route (74.2%), followed by Coffs Harbour route (59.7%) and Dubbo route (58.0%).

Table 1 shows **busiest NSW intrastate routes among the Top 57 Competitive routes in Australia** by seat and passenger numbers in both directions in YE June 2021.

Table 1: NSW busiest intrastate routes

SYDNEY to/from (two way traffic*)	Available seats YE Jun 2021 (000)	% share YE Jun 2021	Passengers YE Jun 2021 (000)	% share YE Jun 2021	Load Factor (%) [^]
Ballina	687	62.4%	510	68.7%	74.2%
Coffs Harbour	152	13.8%	91	12.3%	59.7%
Albury	74	6.7%	42	5.6%	56.4%
Wagga Wagga	73	6.6%	39	5.2%	53.1%
Dubbo	73	6.6%	42	5.7%	58.0%
Port Macquarie	41	3.7%	18	2.4%	44.0%
Total NSW Intrastate routes	1,101	100%	742	100%	67.4%

* 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.

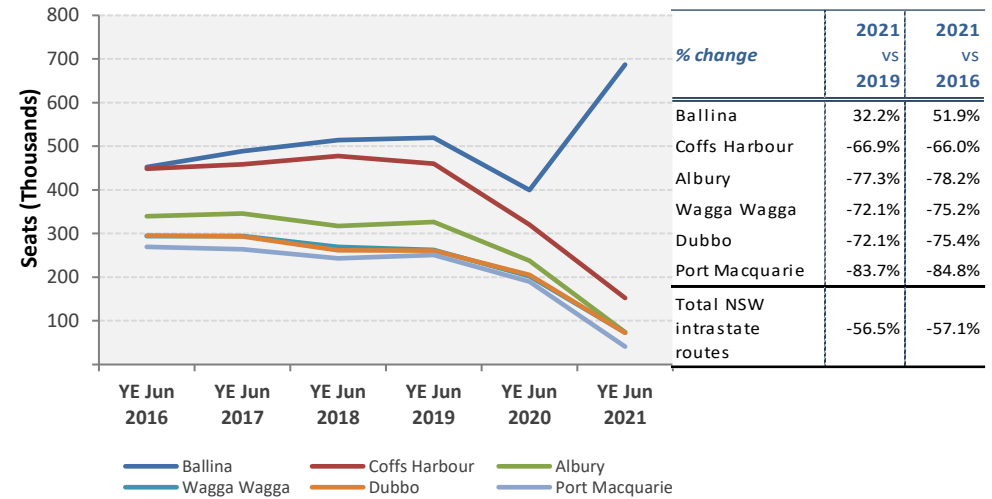
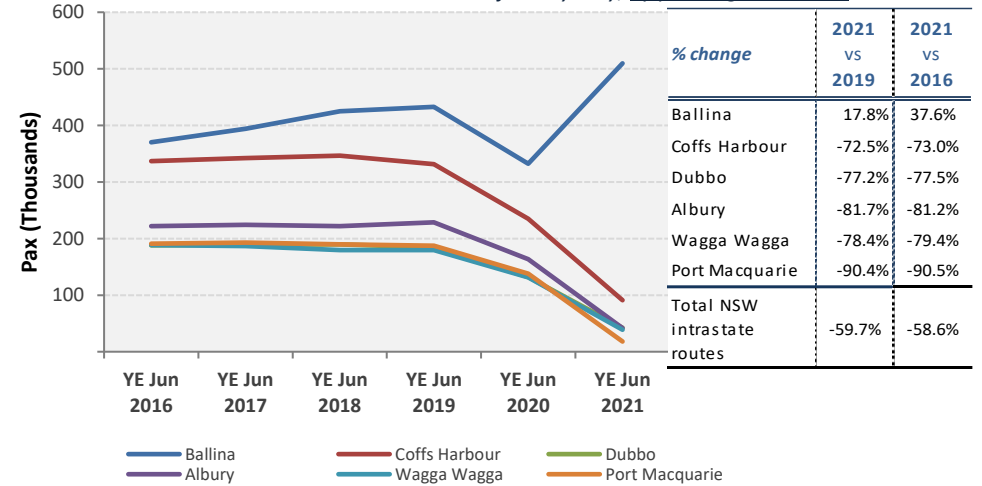


Chart 5: Busiest NSW intrastate routes to and from Sydney, by passenger numbers.



SYDNEY INTERSTATE ROUTES

Sydney had 11 interstate city pair routes in the Top 57 Competitive routes in Australia in YE June 2021. These routes accounted for 34% each of the available seats and passenger traffic in both directions.

All Sydney interstate routes marked a decline in both seats and passengers for the year as compared to YE June 2019. The volume of available seats and passengers travelling in both directions declined for total Sydney interstate routes (down 70.3% and down 77.0%, 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 recorded a decline for the year in both seats (down 73.6%) and passengers (down 81.2%). The route accounts for the highest volume of seats and passengers of the top Sydney competitive routes, however the load factor was only the 9th highest.

The **Sydney to Gold Coast** ranked third in seats and passengers but highest in load factor at 72.4%.

Table 2 below shows the busiest Sydney interstate routes among the Top 57 competitive routes in Australia by seats and passenger numbers in both directions in YE June 2021.

Table 2: Sydney interstate routes

SYDNEY to/from (two way traffic*)	Available seats YE Jun 2021 (000)	% share YE Jun 2021	Passengers YE Jun 2021 (000)	% share YE Jun 2021	Load Factor (%)^
Melbourne	2,845	32.1%	1,728	30.1%	60.7%
Brisbane	1,903	21.5%	1,238	21.5%	65.0%
Gold Coast	1,049	11.8%	759	13.2%	72.4%
Adelaide	907	10.2%	617	10.7%	68.0%
Perth	561	6.3%	333	5.8%	59.3%
Hobart	401	4.5%	268	4.7%	66.8%
Cairns	368	4.2%	258	4.5%	70.1%
Sunshine Coast	301	3.4%	216	3.8%	71.9%
Canberra	231	2.6%	124	2.2%	53.7%
Launceston	184	2.1%	130	2.3%	70.5%
Hamilton Island	113	1.3%	73	1.3%	64.8%
Total Sydney Interstate routes	8,864	100%	5,744	100%	64.7%
Total Top Competitive routes in Australia	26,043	-	17,029	-	65.4%

* 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.

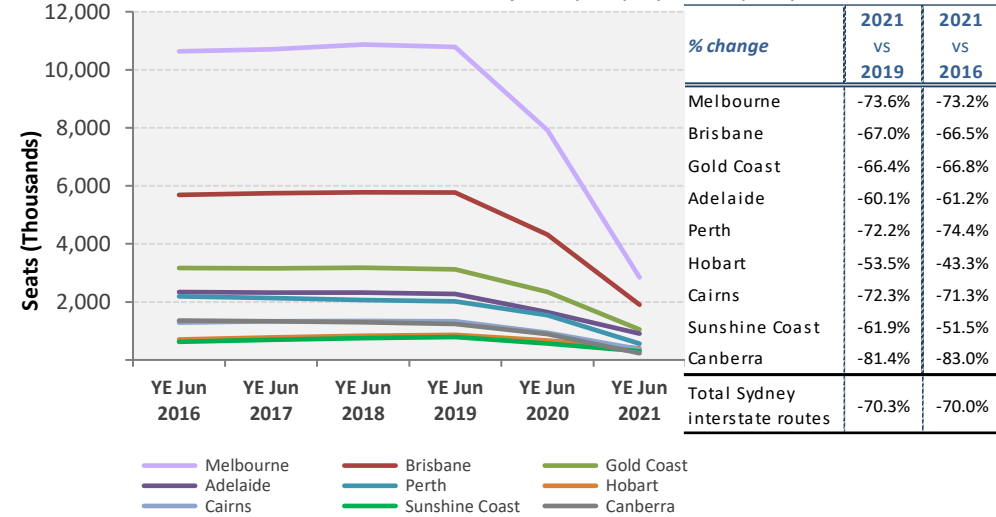


Chart 7: Busiest NSW interstate routes to and from Sydney, by passenger numbers.

