

NSW Domestic Aviation Performance

Top 66 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.

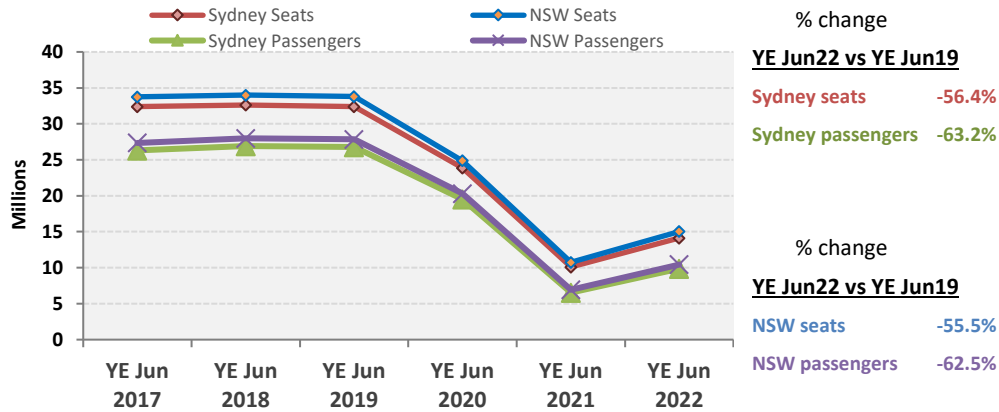
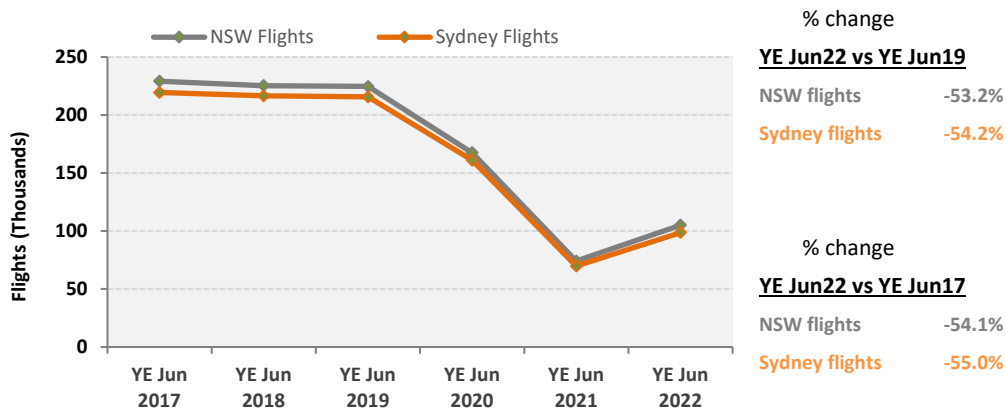


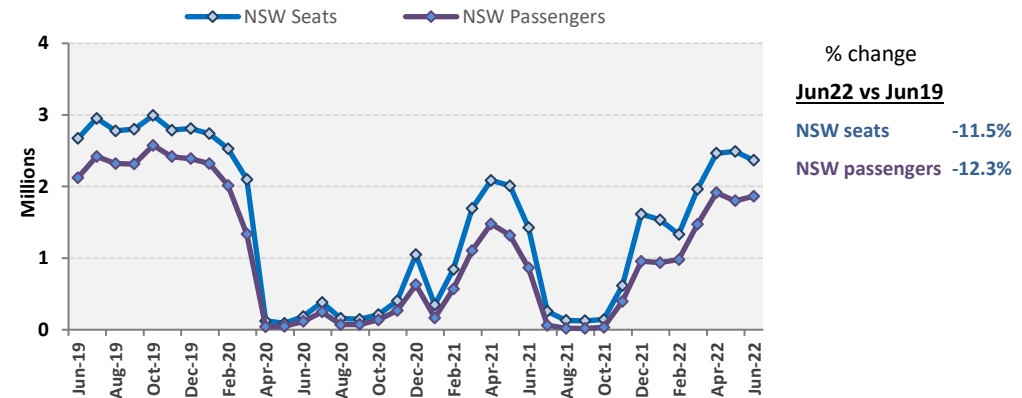
Chart 3: Yearly flight services to and from Sydney and New South Wales.



Year ended June 2022

All the statistics in this report relate to Australia's top 66 competitive routes and NSW's performance in the year ended (YE) June 2022 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. With the easing of some travel restrictions, there were increases in seats and passengers especially during school holiday months. The lockdown and state border restrictions imposed in mid-June 2021 in response to the Sydney COVID-19 outbreak saw a sharp decline in aviation performance for NSW. However, with lockdown ending in NSW in October there was a significant recovery since November. Aviation performance was hit again by a surge in Omicron cases in January 2022, however with the reopening of state borders there were signs of recovery in the following months. Compared to the same month in 2019, the volume of seats declined by 11.5% in June 2022, and consequently the number of passengers also fell by 12.3%. [Chart 2]

In terms of **flights**, NSW had 105,115 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 53% and 54%, respectively). [Chart 3]

With 15.0 million domestic **seats** and 10.5 million domestic **passengers**, NSW accounted for over a third of Australia's aviation capacity and passengers (40% and 41%, respectively) in YE June 2022. Sydney contributed to 94% each of the NSW seats and passengers for the year. Volume of passengers in NSW and Sydney both increased by more than half as compared to YE June 2021. [Chart 1]

The average **passenger load factor** on Sydney domestic flights for the year was 69.8%, which was similar to the average for NSW (69.5%) and the national average (68.1%).

NSW INTRASTATE ROUTES

In YE June 2022, 27 of the top 66 Competitive routes in Australia were NSW routes. Of those, 8 routes were intrastate.

All NSW intrastate routes, except Sydney to Ballina marked a decline in seats 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 53.8% and down 59.8%, respectively).

Sydney to Ballina has been the top NSW intrastate route, and its volume of available seats increased for the year as compared to YE June 2019 (up 13.4%) while passengers declined (down 10.6%). 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 as compared to YE June 2019 (down 54.9% and down 61.4%, respectively).

The passenger load factor was the highest for the Sydney to Wagga Wagga route (66.2%), followed by Ballina route (65.6%) and Coffs Harbour route (61.7%).

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 June 2022.

Table 1: NSW busiest intrastate routes

SYDNEY to/from (two way traffic*)	Available seats YE Jun 2022 (000)	% share YE Jun 2022	Passengers YE Jun 2022 (000)	% share YE Jun 2022	Load Factor (%) [^]
Ballina	590	50.4%	387	52.3%	65.6%
Coffs Harbour	207	17.7%	128	17.3%	61.7%
Dubbo	114	9.8%	68	9.2%	59.8%
Albury	96	8.2%	59	8.0%	61.1%
Port Macquarie	78	6.7%	46	6.2%	58.5%
Wagga Wagga	54	4.6%	36	4.8%	66.2%
Total NSW Intrastate routes	1,169	100%	740	100%	63.3%

* 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.

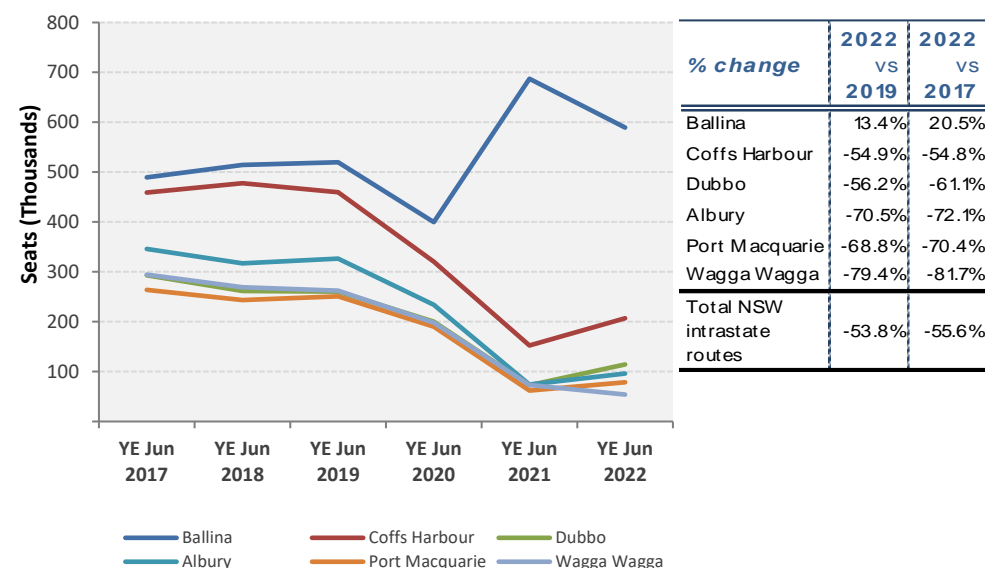
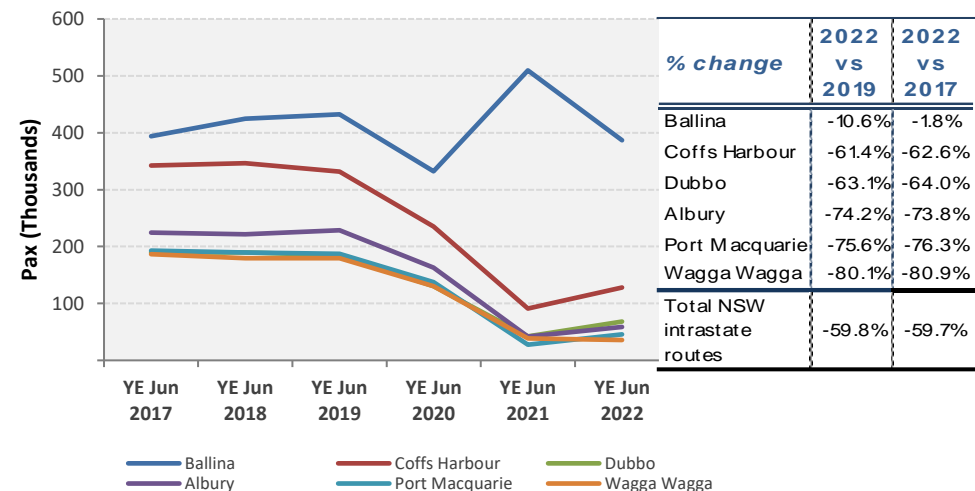


Chart 5: Busiest NSW intrastate routes to and from Sydney, by passenger numbers.



SYDNEY INTERSTATE ROUTES

Sydney had 17 interstate city pair routes in the Top 66 Competitive routes in Australia in YE June 2022. These routes accounted for 35% of the available seats and 36% of the 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 56.7% and down 63.4%, 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 as compared to YE June 2019 in both seats (down 54.7%) and passengers (down 60.6%). The route accounts for the highest volume of seats, passengers and load factor of the top Sydney competitive routes.

The **Sydney to Gold Coast** ranked third in seats and passengers but second highest in load factor at 73.5%.

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 June 2022.

Table 2: Sydney interstate routes

SYDNEY to/from (two way traffic*)	Available seats YE Jun 2022 (000)	% share YE Jun 2022	Passengers YE Jun 2022 (000)	% share YE Jun 2022	Load Factor (%) [^]
Melbourne	4,890	37.8%	3,625	39.7%	74.1%
Brisbane	2,418	18.7%	1,692	18.6%	70.0%
Gold Coast	1,544	11.9%	1,135	12.4%	73.5%
Adelaide	1,046	8.1%	713	7.8%	68.2%
Perth	559	4.3%	387	4.2%	69.2%
Cairns	552	4.3%	361	4.0%	65.4%
Hobart	534	4.1%	335	3.7%	62.6%
Sunshine Coast	520	4.0%	327	3.6%	62.9%
Canberra	460	3.6%	262	2.9%	57.0%
Launceston	209	1.6%	144	1.6%	68.8%
Hamilton Island	164	1.3%	103	1.1%	62.9%
Total Sydney Interstate routes	12,941	100%	9,122	100%	70.5%
Total Top Competitive routes in Australia	37,408	-	25,465	-	68.1%

* 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.

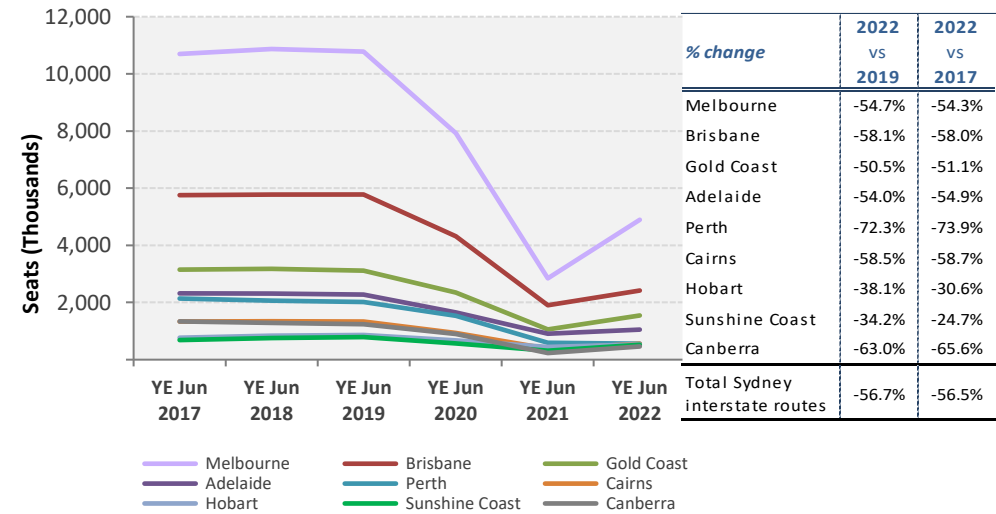


Chart 7: Busiest NSW interstate routes to and from Sydney, by passenger numbers.

