



Top 78 competitive routes in Australia, two-way traffic.

Source: Bureau of Infrastructure, Transport and Regional Economics (BITRE).

SEAT CAPACITY, FLIGHTS AND PASSENGER ARRIVALS

Chart 1: Yearly seat capacity and passenger traffic to and from Sydney and NSW

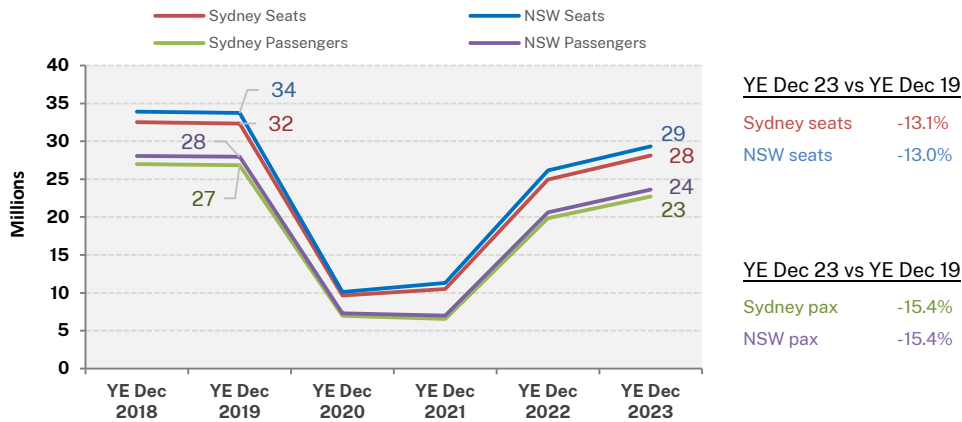


Chart 2: Monthly seat capacity and passenger traffic to and from NSW

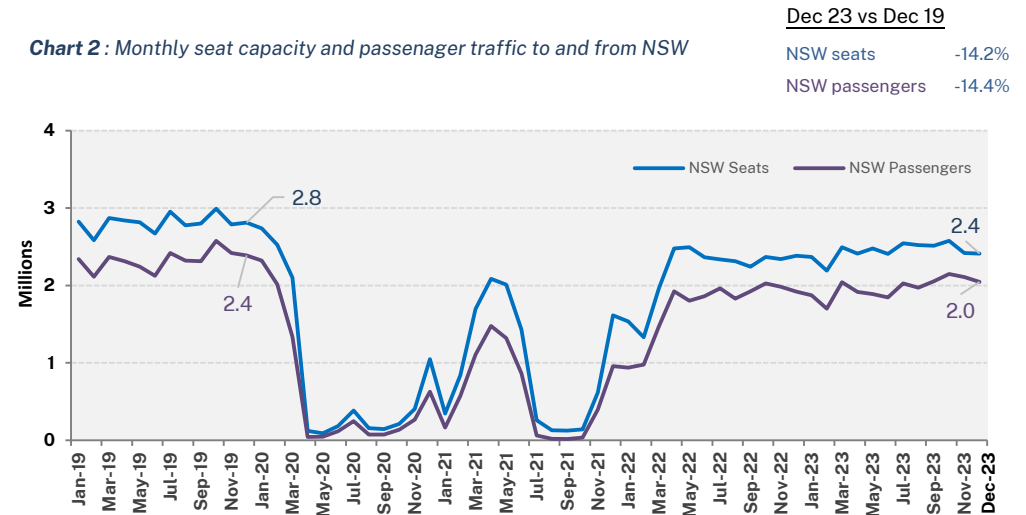
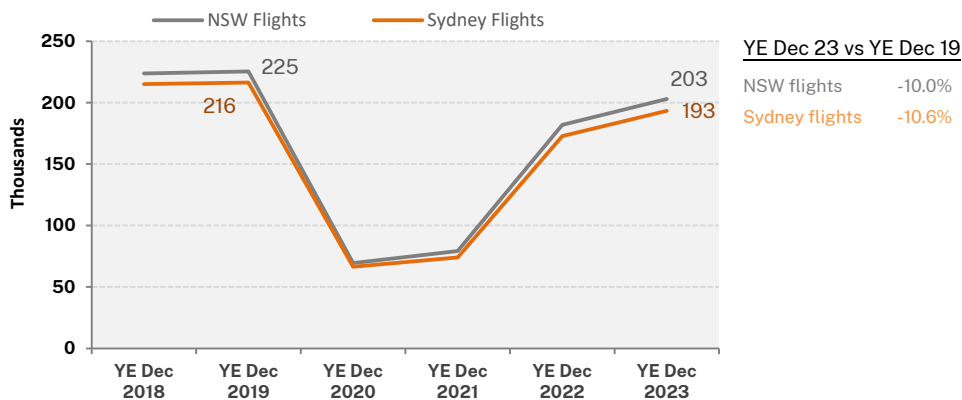


Chart 3: Yearly flight services to and from Sydney and New South Wales.



The Domestic airline industry in Australia is nearly two years away from the end of the final border restrictions due to the COVID-19 pandemic. Although the industry is well on the road to recovery, it has not yet managed to recover to pre-pandemic levels.

In the first half of 2022, air travel in NSW increased considerably and has gradually continued on this positive trajectory.

[Charts 1 and 3] In the year ended (YE) December 2023, Sydney and NSW each reached around 87 percent of pre-pandemic seats level, around 85 per cent of passengers and around 90 per cent of flights.

[Chart 2] Compared to the same month in 2019, the volume of seats and passengers were both at 86 per cent, in December 2023.

NSW INTRASTATE ROUTES

In YE December 2023, 27 of the top 78 Competitive routes in Australia were NSW routes. Of those, 8 routes were intrastate.

Sydney to Ballina and Sydney to Dubbo routes marked an increase in seats for the year as compared to YE December 2019. In the same period, the volume of available seats and passengers travelling in both directions declined for total NSW intrastate routes.

Sydney to Ballina continues to be the top NSW intrastate route. Its volume of available seats and the number of passengers increased for the year as compared to YE December 2019.

Sydney to Coffs Harbour route was the 2nd most in demand NSW intrastate route. It recorded an increase in seats, but a decline in passenger numbers compared to the same period in 2019.

However, when compared to 2022, both routes recorded a decline in seat capacity.

The passenger load factor was the highest for the Sydney to Ballina route, followed by the Coffs Harbour route and Albury route.

Table 1 shows **busiest NSW intrastate routes among the Top 78 Competitive routes in Australia** by seat and passenger numbers in both directions in YE December 2023.

Table 1: NSW busiest intrastate routes

SYDNEY to/from (two way traffic*)	Available seats YE Dec 2023 (000)	% share YE Dec 2023	Passengers YE Dec 2023 (000)	% share YE Dec 2023	Load Factor 2023 (%)^
Ballina	667	31.0%	535	35.6%	80.2%
Coffs Harbour	283	13.1%	214	14.2%	75.6%
Dubbo	281	13.1%	178	11.8%	63.2%
Port Macquarie	258	12.0%	167	11.1%	64.6%
Wagga Wagga	254	11.8%	154	10.3%	60.6%
Albury	251	11.6%	166	11.0%	66.1%
Total NSW Intrastate routes	2,154	100%	1,501	100%	69.7%

* 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.

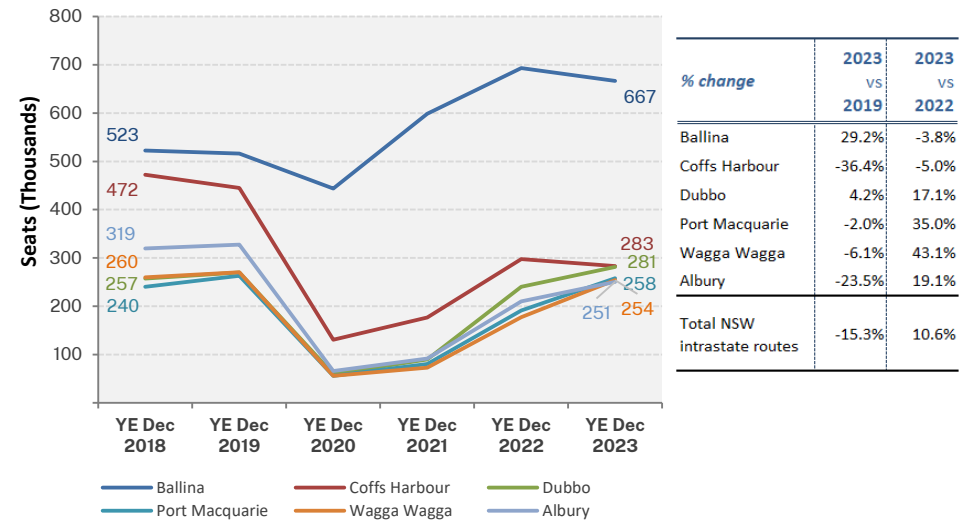
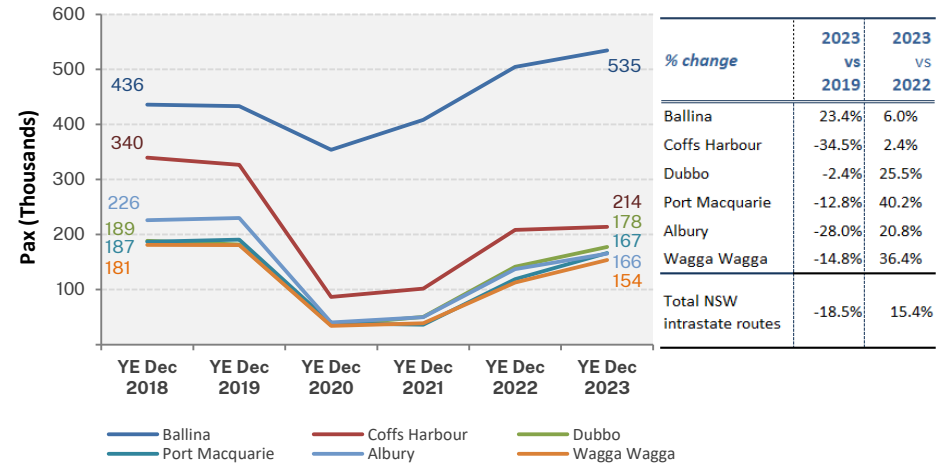


Chart 5: Busiest NSW intrastate routes to and from Sydney, by passenger numbers.



SYDNEY INTERSTATE ROUTES

Sydney had 19 interstate city pair routes in the Top 78 Competitive routes in Australia in YE December 2023. These routes accounted for 41 per cent of the available seats and 42 per cent 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 December 2019.

Sydney to Melbourne remains the top NSW Interstate route in terms of seats and passengers, followed by the **Sydney to Brisbane** route. The route recorded a decline for the year as compared to YE December 2019 in both seats and passengers.

Sydney to Cairns ranked first in load factor, followed by Sydney to Gold Coast and Sydney to Perth routes.

Table 2 below shows the **busiest Sydney interstate routes among the Top 78 competitive routes in Australia** by seats and passenger numbers in both directions in YE December 2023.

Table 2: Sydney interstate routes

SYDNEY to/from (two way traffic*)	Available seats YE Dec 2023 (000)	% share YE Dec 2023	Passengers YE Dec 2023 (000)	% share YE Dec 2023	Load Factor 2023 (%)^
Melbourne	9,299	35.8%	7,620	35.9%	81.9%
Brisbane	5,247	20.2%	4,251	20.0%	81.0%
Gold Coast	2,851	11.0%	2,437	11.5%	85.5%
Adelaide	2,119	8.2%	1,743	8.2%	82.3%
Perth	1,883	7.3%	1,587	7.5%	84.3%
Cairns	999	3.8%	880	4.1%	88.1%
Sunshine Coast	944	3.6%	757	3.6%	80.2%
Hobart	925	3.6%	735	3.5%	79.5%
Canberra	917	3.5%	603	2.8%	65.7%
Launceston	409	1.6%	331	1.6%	80.8%
Hamilton Island	345	1.3%	246	1.2%	71.3%
Total Sydney Interstate routes	25,960	100%	21,206	100%	81.7%
Total Top Competitive routes in Australia	63,342	-	50,589	-	79.9%

* Traffic covers both directions of each city pair.

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

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

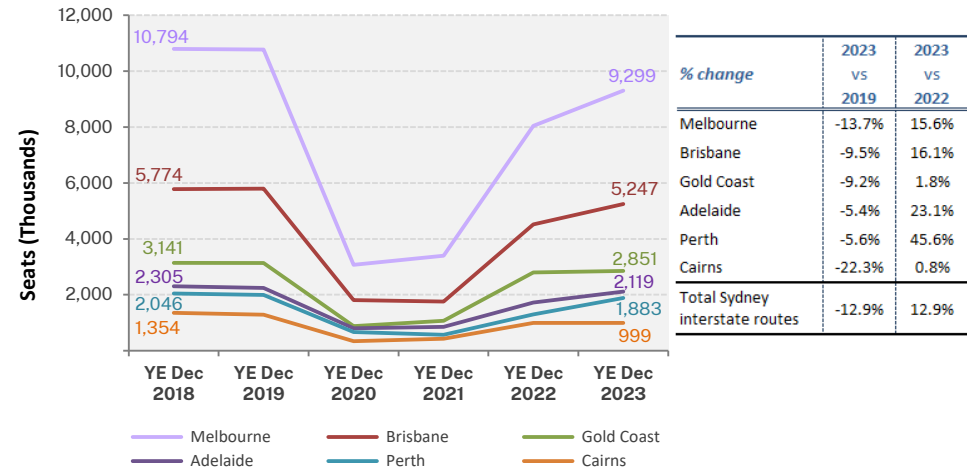


Chart 7: Busiest NSW interstate routes to and from Sydney, by passenger numbers.

