

NSW International Aviation Performance

Year ended December 2023



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

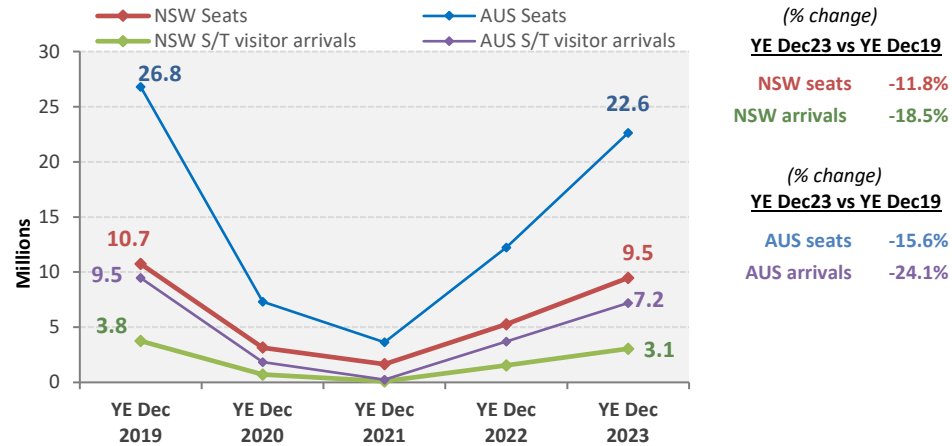


Chart 3: Monthly inbound seat capacity and short-term visitor arrivals to NSW.

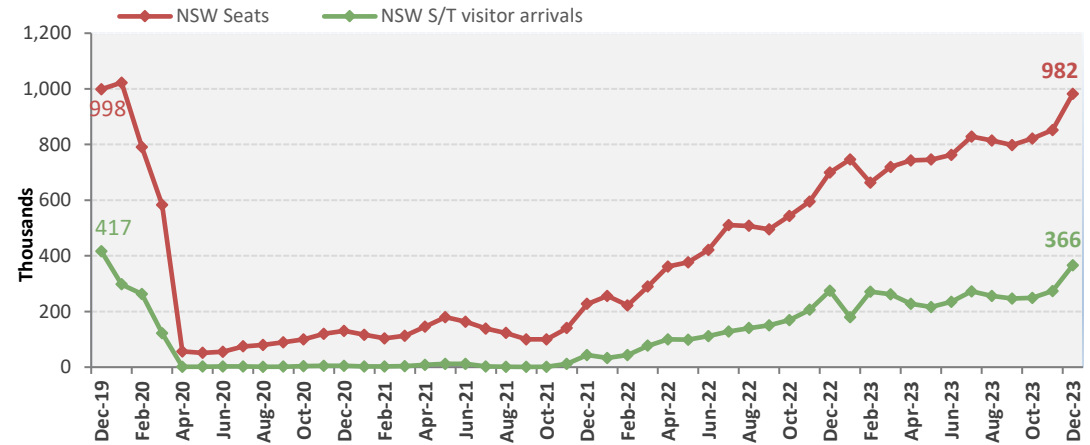
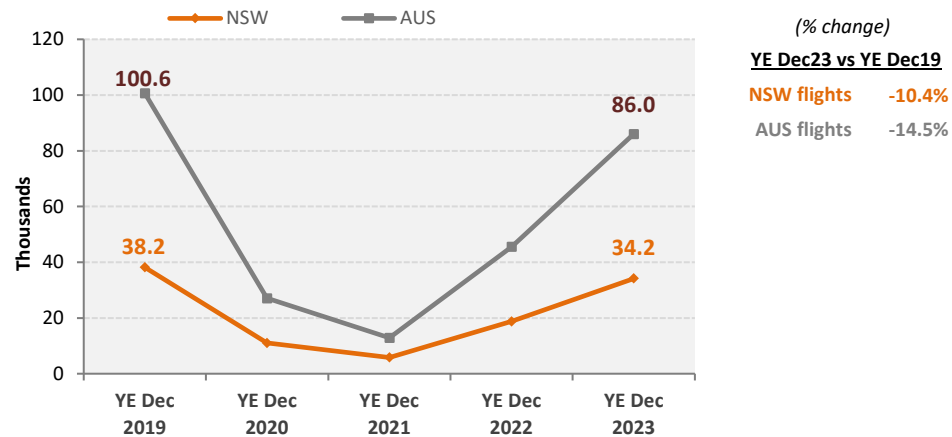


Chart 2: Inbound flights to NSW and Australia.



Due to the Covid-19 global pandemic, Australia's international border was shut between March 2020 and February 2022. The freedom of movement was greatly impacted by this with 2020 and 2021 being the most affected years. Beginning in early 2022, the aviation industry had been showing signs of recovery and this trend became more solid in 2023.

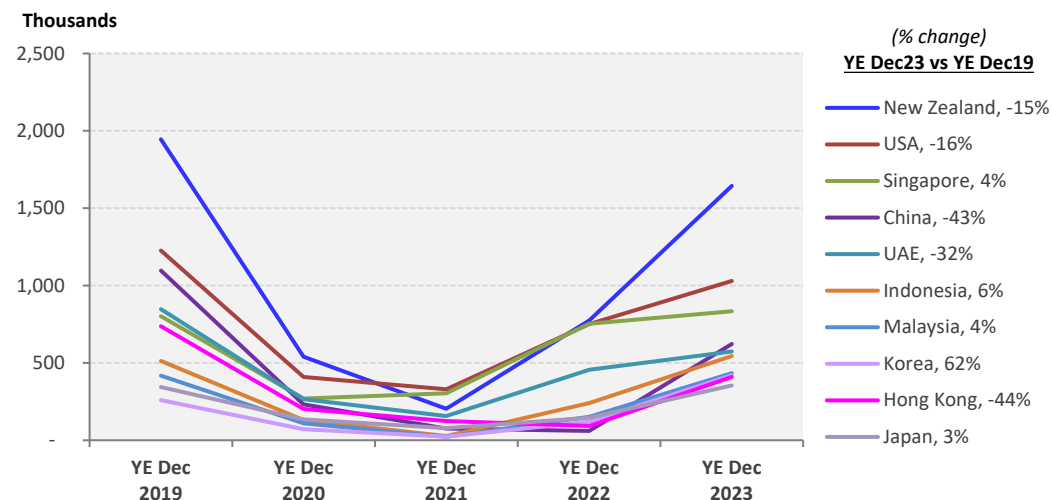
NSW accounted for 9.5 million seats or 42% of Australia's inbound seat capacity in the Year Ended (YE) Dec 2023, an 80% increase from the year before. NSW received 3.1 million short-term visitor arrivals, almost being double the arrivals in YE December 2022. [Chart 1]

The inbound flights to NSW in 2023 were 34,192, up 82% on the previous year. NSW had the highest share (40%) of all international flights to Australia. [Chart 2]

The average passenger load factor on all international flights to and from NSW (Sydney and Newcastle) in YE December 2023 was 78.0%, being 0.4% lower than the previous year and 2.0% below the national average of 80.0%.

INBOUND SEAT CAPACITY TO NSW BY ORIGIN COUNTRY

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



In YE December 2023, New Zealand had the highest number of inbound seats to NSW (1.6 million seats), followed by the USA and Singapore. Both NZ and the USA ranked the top 2 as they did pre-COVID. China ranks the 4th, with a robust 930% increase on the previous year.

In YE December 2023, the available seats to NSW were short 1.3 million (-11.8%) as compared to YE December 2019. China to NSW recorded the highest shortfall (down 475,000 seats), followed by Hong Kong and New Zealand.

The international seat capacity from certain countries to NSW has exceeded their respective 2019 levels. South Korea had the biggest increase by 160,700 seats, a 62% increase, followed by Singapore and Indonesia.

Generally, foreign airlines had the highest share of seats from their respective parent countries to NSW, except for NZ, the USA and Indonesia, where Qantas held the highest share.

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

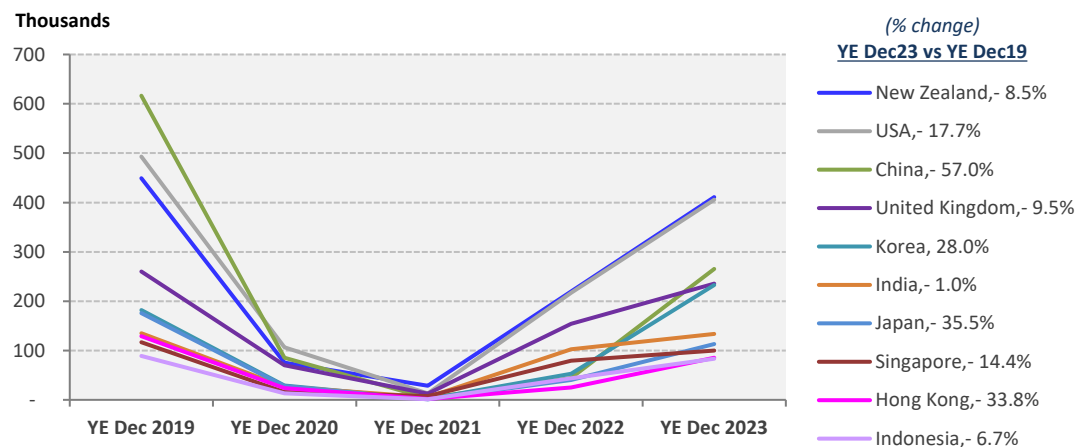
TOP COUNTRY MARKETS TO NSW	Inbound seats YE Dec 2023 (000) (1)	% change on YE Dec 2019	Change in volume on YE Dec 2019 (000)	% share of total seats to NSW YE Dec 2023 (2)	% share of total seats to NSW YE Dec 2019	Share of total NSW seats by country (Top carriers) YE Dec 2023
New Zealand	1,644.2	-15.5%	-300.8	17.3%	18.1%	1. Qantas Airways (39%) 2. Air New Zealand (33%) 3. Jetstar (8%) 4. Emirates (8%) 5. Air Asia X (8%)
USA	1,030.4	-16.0%	-195.9	10.9%	11.4%	1. Qantas Airways (37%) 2. United Airlines (27%) 3. Delta Airlines (13%) 4. American Airlines (11%) 5. Hawaiian Airlines (7%)
Singapore	833.8	4.1%	32.7	8.8%	7.5%	1. Singapore Airlines (63%) 2. Scoot (25%) 3. Qantas Airways (13%)
China	621.9	-43.3%	-475.0	6.6%	10.2%	1. China Southern Airlines (33%) 2. China Eastern Airlines (28%) 3. Xiamen Airlines (14%) 4. Air China (10%) 5. Hainan Airlines (4%)
UAE	573.6	-32.3%	-273.4	6.1%	7.9%	1. Emirates (77%) 2. Etihad (23%)
Indonesia	544.2	6.0%	30.9	5.7%	4.8%	1. Qantas Airways (33%) 2. Jetstar (32%) 3. Garuda Indonesia (16%) 4. Virgin Australia (12%) 5. Batik Air Indonesia (7%)
Malaysia	433.6	3.7%	15.5	4.6%	3.9%	1. Malaysia Airlines (50%) 2. AirAsia X (35%) 3. Malindo Air (15%)
Korea	420.4	61.9%	160.7	4.4%	2.4%	1. Asiana Airlines (34%) 2. Korean Air (25%) 3. T'way Air (15%) 4. Jetstar (13%) 5. Qantas Airways (13%)
Hong Kong	409.9	-44.4%	-327.1	4.3%	6.9%	1. Cathay Pacific Airways (73%) 2. Qantas Airways (27%)
Japan	354.3	2.9%	10.0	3.7%	3.2%	1. All Nippon Airways (46%) 2. Qantas Airways (32%) 3. Japan Airlines (21%)
Total to NSW	9,479.1	-11.8%	-1,263.3	100%	100%	1. Qantas Airways (24%) 2. Emirates (6%) 3. Jetstar (6%) 4. Air New Zealand (6%) 5. Singapore Airlines (5%)

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 Year ending December 2023, New Zealand accounted for 17.3% 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.



In YE December 2023, New Zealand, the USA and China were the top 3 source markets for short-term visitors to NSW, the same as in the pre-COVID period. NZ is the market that was closest to returning to its pre-COVID level out of the top 3.

Compared to YE December 2019, there was a shortfall of short-term arrivals to NSW from almost all markets, amounting to a total of 0.7 million (down 18.5%). With a decrease of 351,100, China saw the largest gap, followed by the USA and Japan. Yet South Korea exceptionally surpassed its YE December 2019 level by 50,900 arrivals (up 28%).

With the exception of the UK and Indonesia, where Qantas held the top spot, and India, where Singapore Airlines held the top spot, foreign airlines accounted for the largest proportion of short-term arrivals from their respective parent countries.

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

TOP 10 ORIGIN MARKETS TO NSW	S/T visitor arrivals YE Dec 2023 (000) (1)	% change on YE Dec 2019	Change in volume on YE Dec 2019 (000)	% share of S/T visitor arrivals to NSW YE Dec 2023 (2)	% share of S/T visitor arrivals to NSW YE Dec 2019	Top carriers by country of origin (%share) YE Dec 2023
New Zealand	411.1	-8.5%	-38.1	13.5%	12.0%	1. Air New Zealand (49%) 2. Qantas Airways (24%) 3. Jetstar (8%) 4. Air Asia X (5%) 5. LAN Chile (3%)
USA	405.7	-17.7%	-87.3	13.3%	13.1%	1. United Airlines (21%) 2. Qantas Airways (21%) 3. Delta Airlines (16%) 4. American Airlines (10%) 5. Air New Zealand (6%)
China	265.3	-57.0%	-351.1	8.7%	16.4%	1. China Southern Airlines (24%) 2. China Eastern Airlines (18%) 3. Xiamen Air (15%) 4. Air China (9%) 5. Cathay Pacific Airways (7%)
United Kingdom	235.5	-9.5%	-24.6	7.7%	6.9%	1. Qantas Airways (18%) 2. Singapore Airlines (12%) 3. Emirates (12%) 4. British Airways (11%) 5. Qatar Airways (7%)
Korea	232.8	28.0%	50.9	7.6%	4.8%	1. Asiana Airlines (29%) 2. Korean Air (21%) 3. T'Way Air (19%) 4. Jetstar (15%) 5. Qantas Airways (9%)
India	133.6	-1.0%	-1.4	4.4%	3.6%	1. Singapore Airlines (22%) 2. Air India (21%) 3. Qantas Airways (14%) 4. Malaysia Airlines (13%) 5. Scoot (8%)
Japan	113.3	-35.5%	-62.4	3.7%	4.7%	1. All Nippon Airways (34%) 2. Qantas Airways (32%) 3. Japan Airlines (16%) 4. Singapore Airlines (2%) 5. Cathay Pacific Airways (2%)
Singapore	99.9	-14.4%	-16.8	3.3%	3.1%	1. Singapore Airlines (42%) 2. Tiger Airways (28%) 3. Qantas Airways (14%) 4. British Airways (4%) 5. Jetstar (2%)
Hong Kong	85.4	-33.8%	-43.6	2.8%	3.4%	1. Cathay Pacific Airways (56%) 2. Qantas Airways (30%) 3. Scoot (3%) 4. Singapore Airlines (2%) 5. Jetstar (1%)
Indonesia	83.1	-6.7%	-5.9	2.7%	2.4%	1. Qantas Airways (45%) 2. Garuda Indonesian Airlines (21%) 3. Singapore Airlines (12%) 4. Jetstar (6%) 5. Scoot (3%)
Total to NSW	3,055.2	-18.5%	-695.6	100%	100%	1. Qantas Airways (18%) 2. Air New Zealand (8%) 3. Singapore Airlines (6%) 4. Jetstar (5%) 5. Emirates (4%)

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

NOTE: (2) read this as (example) in the Year ending December 2023, 13.5% of total international short-term visitor arrivals to NSW were from New Zealand.