Australian Aviation Network Overview

September 2024

airservices
australia

Report content

We acknowledge and embrace a culture that celebrates diversity, inclusion, and equality for all. In making this statement we acknowledge Aboriginal and Torres Strait Islander peoples as the Traditional Owners and Custodians of the country on which we operate, now called Australia.

Executive Summary

In September 2024, the Australian aviation network experienced a slight increase (0.3%) in daily average flights, coinciding with the school holidays and Melbourne AFL Grand Final. On Friday 27 September, Melbourne Airport recorded its busiest day for passenger traffic since the pandemic began, with 749 movements.

Industry's social licence for growth continues to be a priority, with initiatives like the Noise Action Plan, cross-boundary User Preferred Routes, and Continuous Descent Operations underway to improve noise and flight outcomes through proactive community engagement. Australia's tourism sector remains resilient despite low consumer sentiment, driven by domestic growth and an increasing number of visitors from Asian markets. While global economic growth is expected to remain steady through 2025, geopolitical tensions pose a risk to the outlook and our sector.

Industry on-time performance (OTP) has improved in August by two percentage points due to better first-rotation performance which is a focus area for airlines. Lead indicators suggest industry OTP will continue to improve in the next OTP reporting cycle by the Bureau of Infrastructure and Transport Research Economics (BITRE).

We are seeing steady improvement in Airservices operating performance. Only 0.1% of total network flight delays were attributed to Airservices with 0.2% of flights impacted by capacity constraints. Ground delay hours were at the lowest level in more than a year, with no Airservices-attributable ground delay at major East Coast airports in September. This reflects ongoing service performance enhancements and a focus on resilience leading into the September school holidays.

Overall, air traffic service variations were limited to fewer airspace groups and air traffic control towers. At control towers, service variations reduced by 61% primarily due to Avalon tower returning to published hours. Ensuring the consistency of service remains our key priority through measures such as active recruitment, tighter leave management practices, improved training pass rates and recruitment strategies, and building resilient rosters.

Economic and social trends

Economic factors

Global economic growth is expected to remain steady through to 2025, despite inflationary risks and geopolitical tensions. Australia's tourism industry remains resilient against subdued consumer sentiment, driven by strong growth domestically and in inbound Asian markets. Recent US Federal Reserve rate cuts could also strengthen Australian currency, potentially impacting exports and international tourism.

Figure 1. Real GDP growth outlook (annual percent change) for global economies and key markets
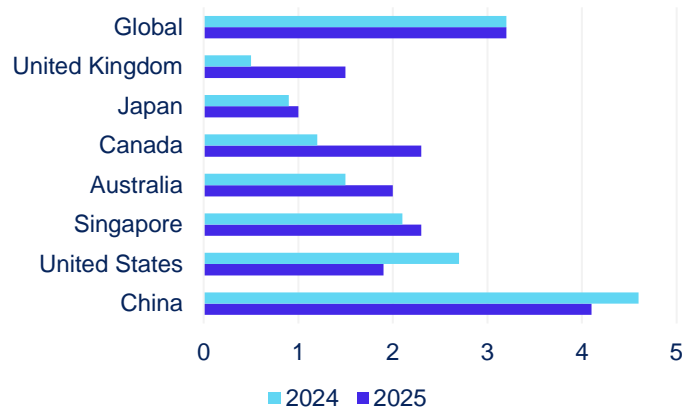
Source: IMF (website)

Figure 2. Westpac-Melbourne Institute Consumer Sentiment Index


Sources: Westpac Economics, Melbourne Institute
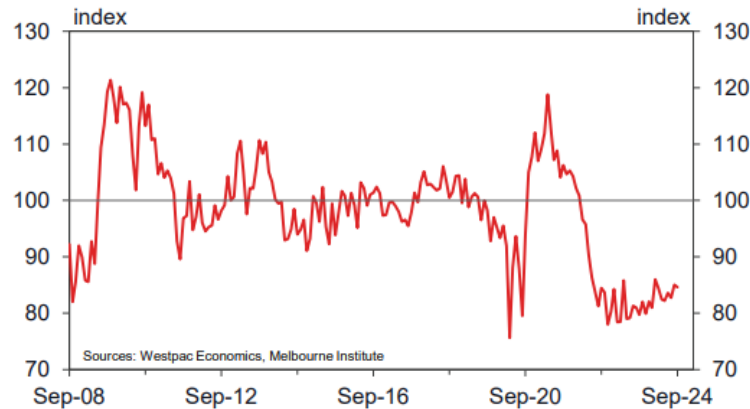
Source: Westpac (website)

Figure 3. Fastest growing inbound markets this year for Australian tourism and experiences (visitor arrivals, with recovery compared to 2019)

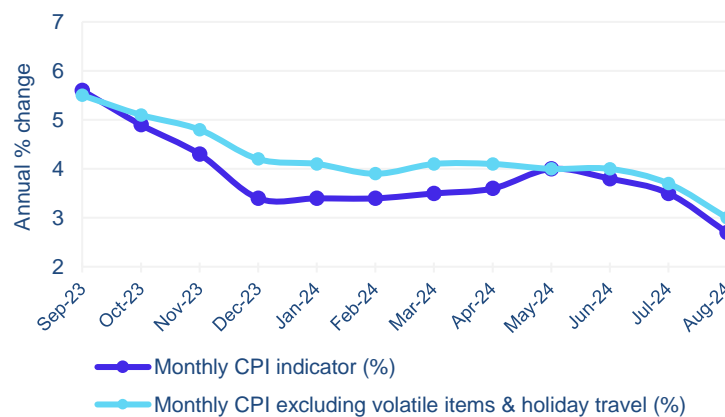| Market	Recovery Jan 2024	Recovery Jan-Jul 2024
Singapore	69%	88%
South Korea	112%	129%
Taiwan	74%	90%
China	50%	61%
India	106%	112%

Source: ABS (website). Markets as reported by Big Red Group.

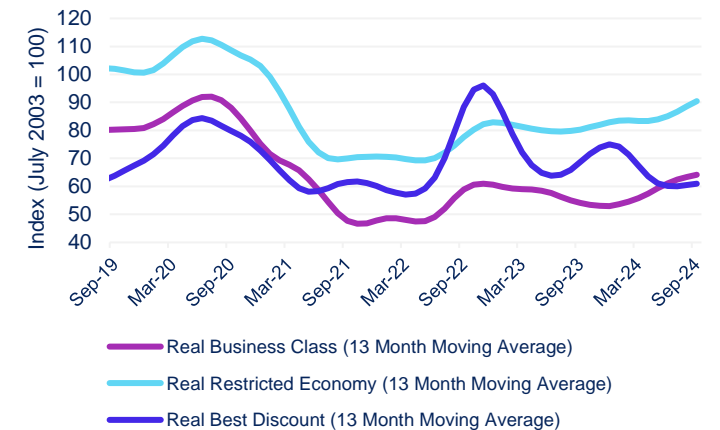## Figure 4. Jet fuel and Brent crude oil prices
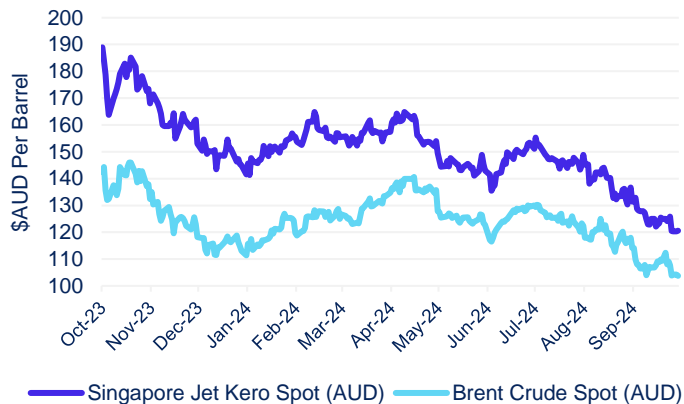
Source: Bloomberg

Figure 5. Consumer Price Index (CPI) Indicator

Source: ABS (website) – data released 25/9/2024 up to August 2024

Figure 6. Domestic air fares by fare class

Source: BITRE (website)

Social factors

Environmental and community outcomes continue to be important factors for industry's collective social licence to grow. The Noise Action Plan for Brisbane recently completed a round of engagement on noise sharing options with mixed feedback. While the number of complainants remains high, there has been a decrease in the frequency of complaints per individual. Additionally, more efficient flight paths are being trialled via initiatives such as cross-boundary User Preferred Routes and Continuous Descent Operations to facilitate environmental improvements in the airspace.

Figure 7. National aircraft noise complaints (top) and complainants (bottom) per month

Figure 9. CO2 emissions savings from optimised User Preferred Routes (UPR) across oceanic and cross-continental airspace per month

Figure 8. Airport aircraft noise complaints, complainants, and complaints by complainant per month

Airport Noise Complaints

Airport Noise Complainants

Airport Noise Complaints per Complainant

■ Brisbane ■ Sydney ■ Perth ■ Melbourne ■ Other Airports*
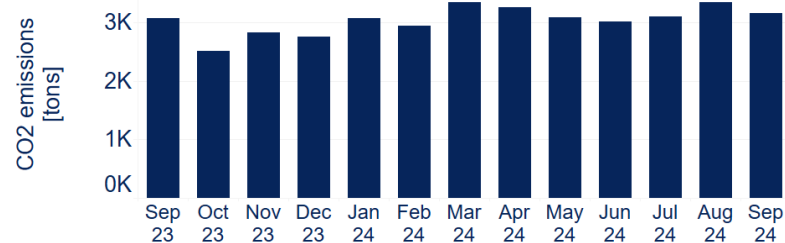
Source: Airservices Noise Complaints and Information Service (NCIS) and Airservices ODAS.
*Other airports include Ballina, Sunshine Coast, Gold Coast, and Hobart.

Australian aviation and regional context

State of Australian aviation growth

The Australian aviation network had a slight increase (0.3%) in daily flights compared to last month, driven by the school holidays and the Melbourne AFL Grand Final. On 27 September, Melbourne Airport recorded its busiest day since the pandemic began.

Average Daily Flights
(September 2024 and % of September 2019)

3,799
101%

Total Domestic Flights
(September 2024 and % of September 2019)

95,963
102%

Total International Flights
(September 2024 and % of September 2019)

18,000
96%

Figure 10. Domestic and international average daily flights compared to Airservices' forecast (shown in dotted line) per month

Figure 11. Average daily flights by industry segment per month

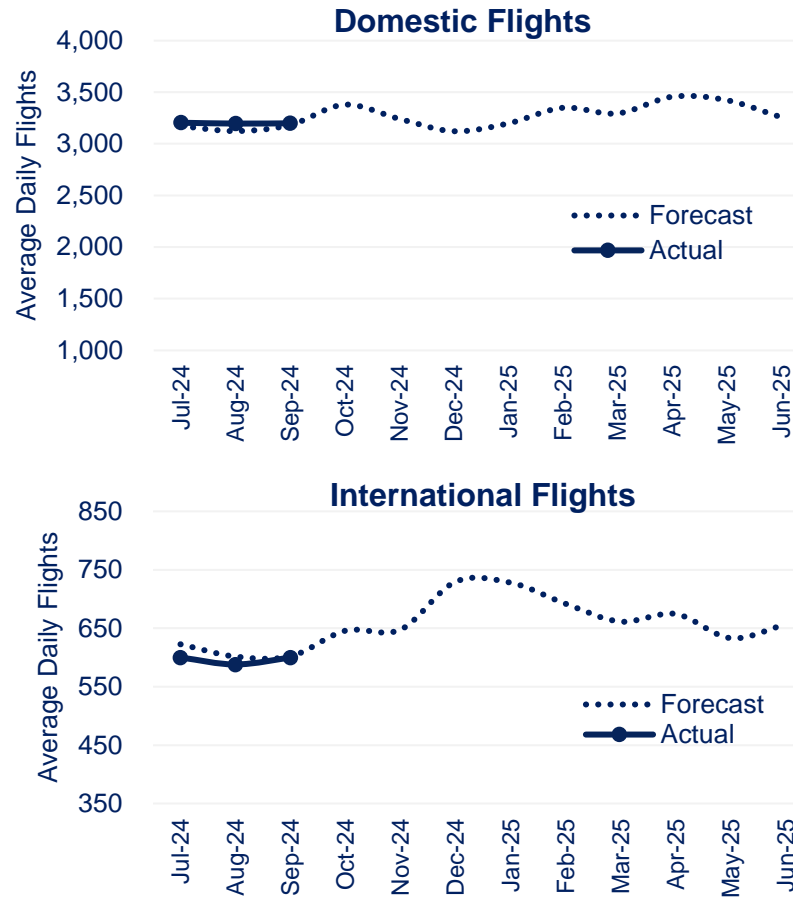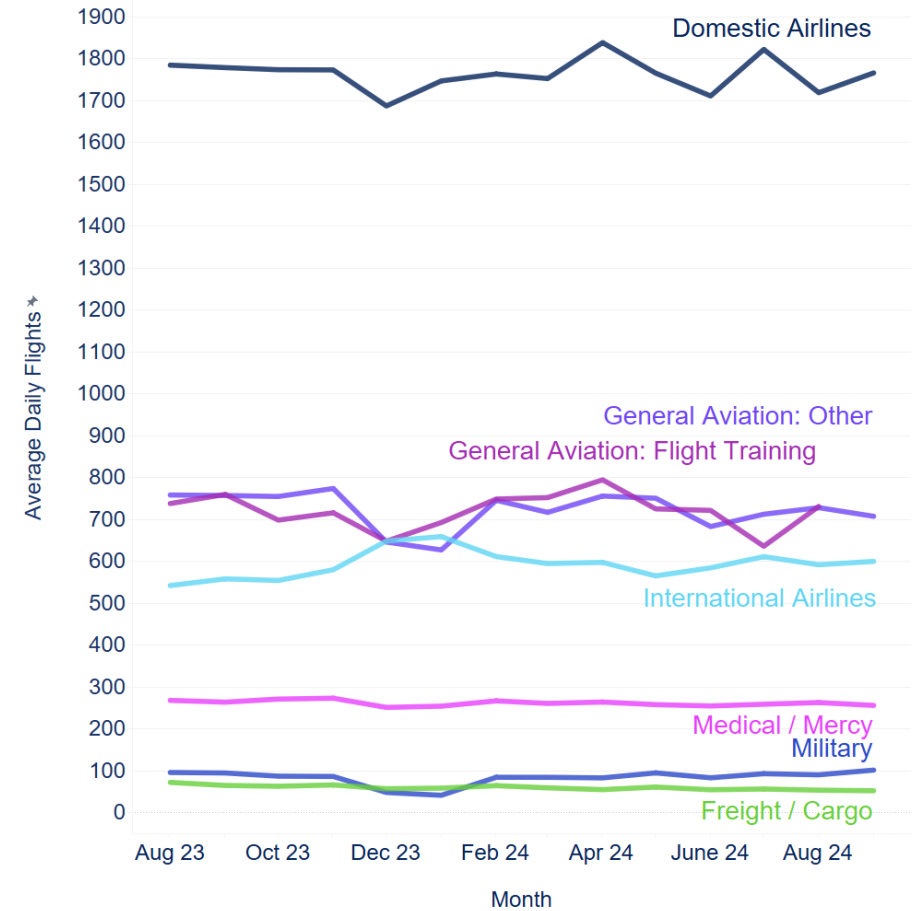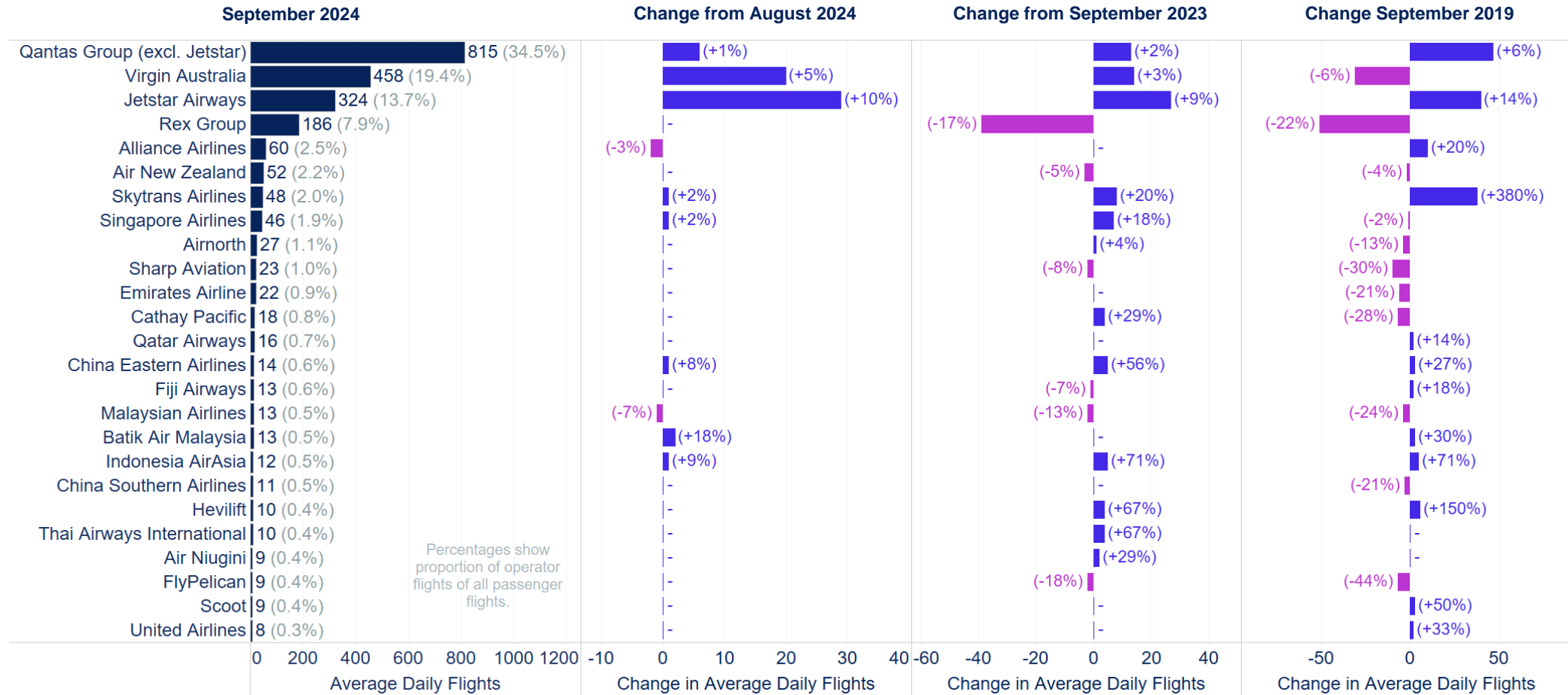Source: Airservices aeronautical charge database. Excludes some general aviation flights that are not subject to Airservices aeronautical charges. Airservices' forecast proposed as of July 2024 and is subject to review by ACCC.

Source: Airservices ODAS (excludes helicopters).
Data for 'General Aviation: Flight Training' is one month in arrears.

Top aircraft operators

Major domestic airlines experienced increased activity compared to last month. To accommodate increased demand for the Melbourne AFL Grand Final, additional flights were scheduled on the Brisbane-Melbourne and Sydney-Melbourne routes. Traffic by major international operators remains below pre-pandemic levels but has shown growth in the last 12 months.

Figure 12. Average daily flights by top operators (September 2024) and comparisons across three reference periods

	September 2024	Change from August 2024	Change from September 2023	Change September 2019
Qantas Group (excl. Jetstar)	815 (34.5%)	(+1%)	(+2%)	(+6%)
Virgin Australia	458 (19.4%)	(+5%)	(+3%)	(-6%)
Jetstar Airways	324 (13.7%)	(+10%)	(+9%)	(+14%)
Rex Group	186 (7.9%)	-	(-17%)	(-22%)
Alliance Airlines	60 (2.5%)	(-3%)	-	(+20%)
Air New Zealand	52 (2.2%)	-	(-5%)	(-4%)
Skytrans Airlines	48 (2.0%)	(+2%)	(+20%)	(+380%)
Singapore Airlines	46 (1.9%)	(+2%)	(+18%)	(-2%)
Airnorth	27 (1.1%)	-	(+4%)	(-13%)
Sharp Aviation	23 (1.0%)	-	(-8%)	(-30%)
Emirates Airline	22 (0.9%)	-	-	(-21%)
Cathay Pacific	18 (0.8%)	-	(+29%)	(-28%)
Qatar Airways	16 (0.7%)	-	-	(+14%)
China Eastern Airlines	14 (0.6%)	(+8%)	(+56%)	(+27%)
Fiji Airways	13 (0.6%)	-	(-7%)	(+18%)
Malaysian Airlines	13 (0.5%)	(-7%)	(-13%)	(-24%)
Batik Air Malaysia	13 (0.5%)	(+18%)	-	(+30%)
Indonesia AirAsia	12 (0.5%)	(+9%)	(+71%)	(+71%)
China Southern Airlines	11 (0.5%)	-	-	(-21%)
Hevilift	10 (0.4%)	-	(+67%)	(+150%)
Thai Airways International	10 (0.4%)	-	(+67%)	-
Air Niugini	9 (0.4%)	-	(+29%)	-
FlyPelican	9 (0.4%)	-	(-18%)	(-44%)
Scoot	9 (0.4%)	-	-	(+50%)
United Airlines	8 (0.3%)	-	-	(+33%)

Percentages show proportion of operator flights of all passenger flights.

Average Daily Flights — Change in Average Daily Flights — Change in Average Daily Flights — Change in Average Daily Flights

Source: Airservices ODAS (includes airline flights only).

Domestic network

The four major capital-city airports drive the overall domestic network performance, where the consistency of on-time performance throughout the day still needs improvement.

Figure 13. Domestic route structure of major domestic airlines (August 2024) for key routes, with relative sizing based on flights for routes and airports.
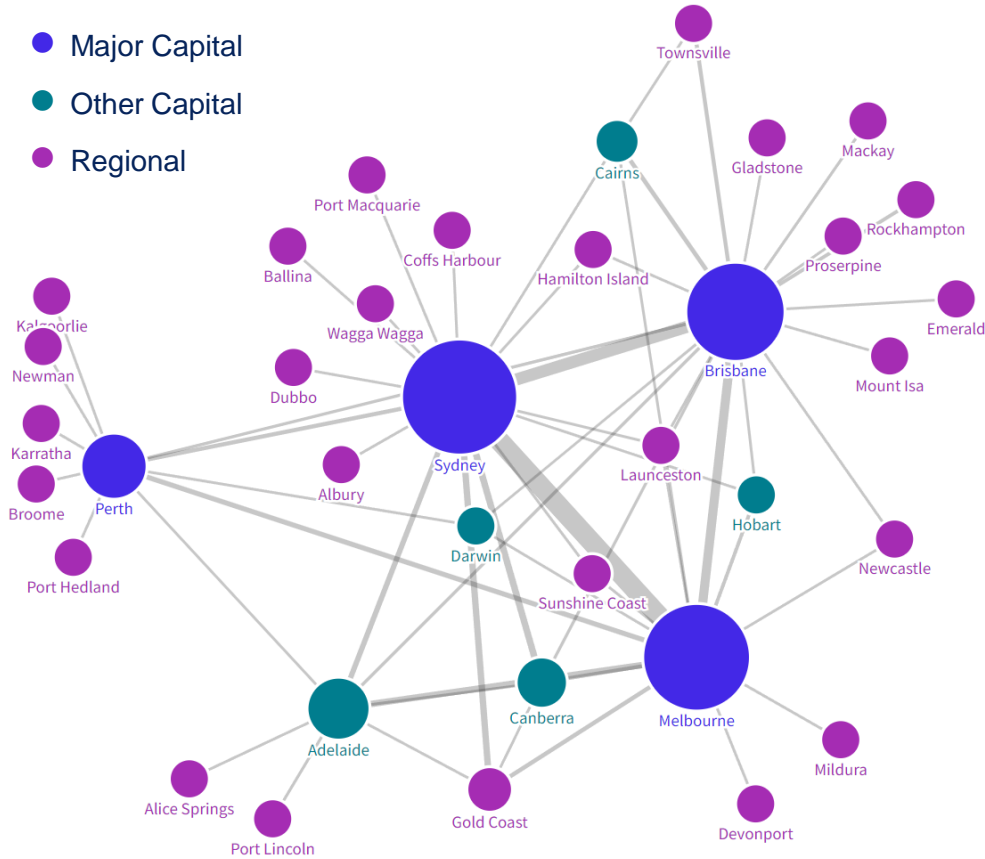

Figure 14. Departure punctuality* % across the day (August 2024) for major capital city airports
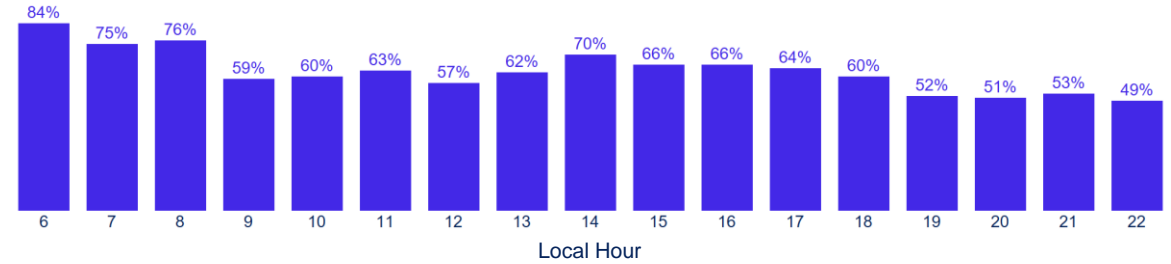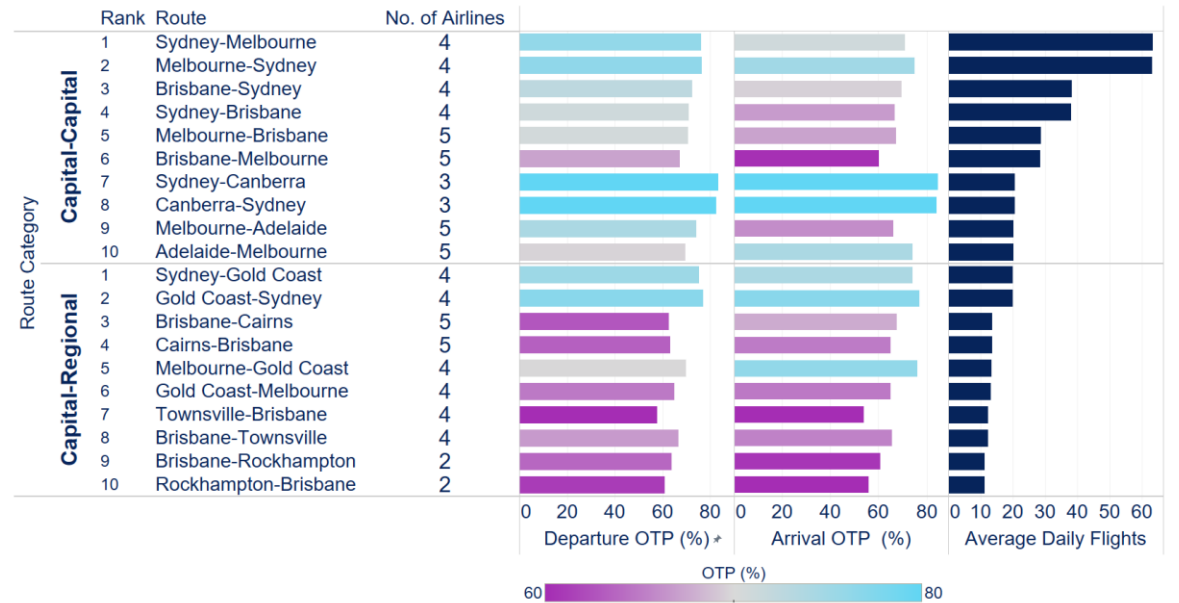

Figure 15. Top ten domestic routes by flights in each route category, with on-time performance %, cancellations %, and average daily flights (August 2024)

| Route Category	Rank	Route	No. of Airlines
Capital-Capital	1	Sydney-Melbourne	4
	2	Melbourne-Sydney	4
	3	Brisbane-Sydney	4
	4	Sydney-Brisbane	4
	5	Melbourne-Brisbane	5
	6	Brisbane-Melbourne	5
	7	Sydney-Canberra	3
	8	Canberra-Sydney	3
	9	Melbourne-Adelaide	5
	10	Adelaide-Melbourne	5
Capital-Regional	1	Sydney-Gold Coast	4
	2	Gold Coast-Sydney	4
	3	Brisbane-Cairns	5
	4	Cairns-Brisbane	5
	5	Melbourne-Gold Coast	4
	6	Gold Coast-Melbourne	4
	7	Townsville-Brisbane	4
	8	Brisbane-Townsville	4
	9	Brisbane-Rockhampton	2
	10	Rockhampton-Brisbane	2

Source: BITRE (data available up to 31 August 2024 based on latest BITRE data release). All routes are not shown in network graph.
*Airservices ODAS (includes major domestic airline flights only).

Traffic flows from international markets

International flights have increased to 96% of pre-pandemic levels, driven by growths in South East Asia, Pacific, New Zealand and China. The South Africa market is also growing, with doubled seat capacity on routes to Johannesburg. However, geopolitical tensions in the Middle East continue to pose a risk to transcontinental flights.

Figure 16. Percentage change in total flights by international markets (September 2024 vs September 2019)

Figure 17. Average daily flights by international markets per month
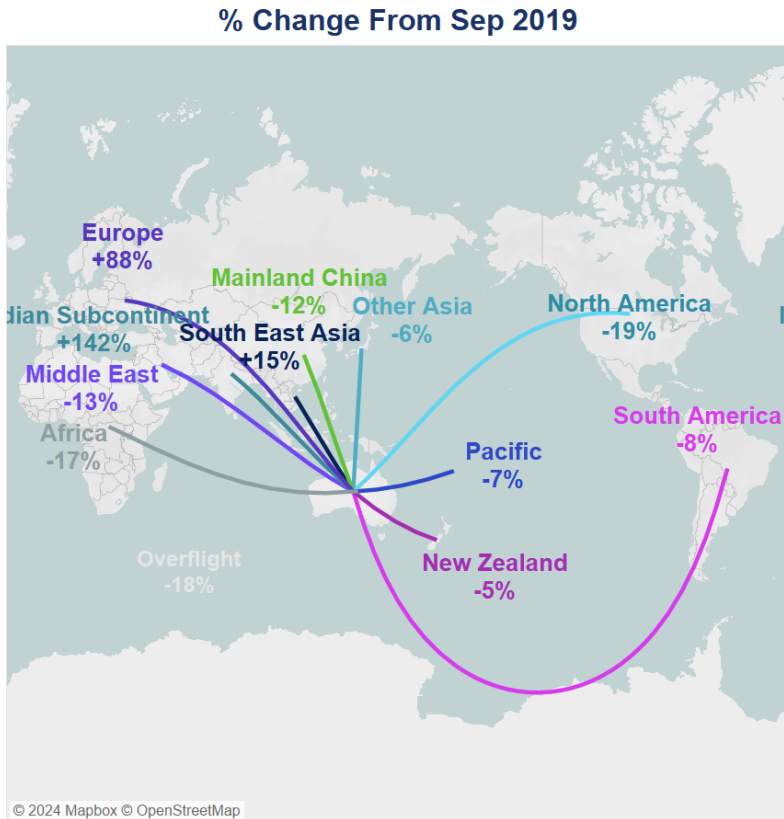
Note: Percentage changes for Europe and the Indian Subcontinent are from a low base.
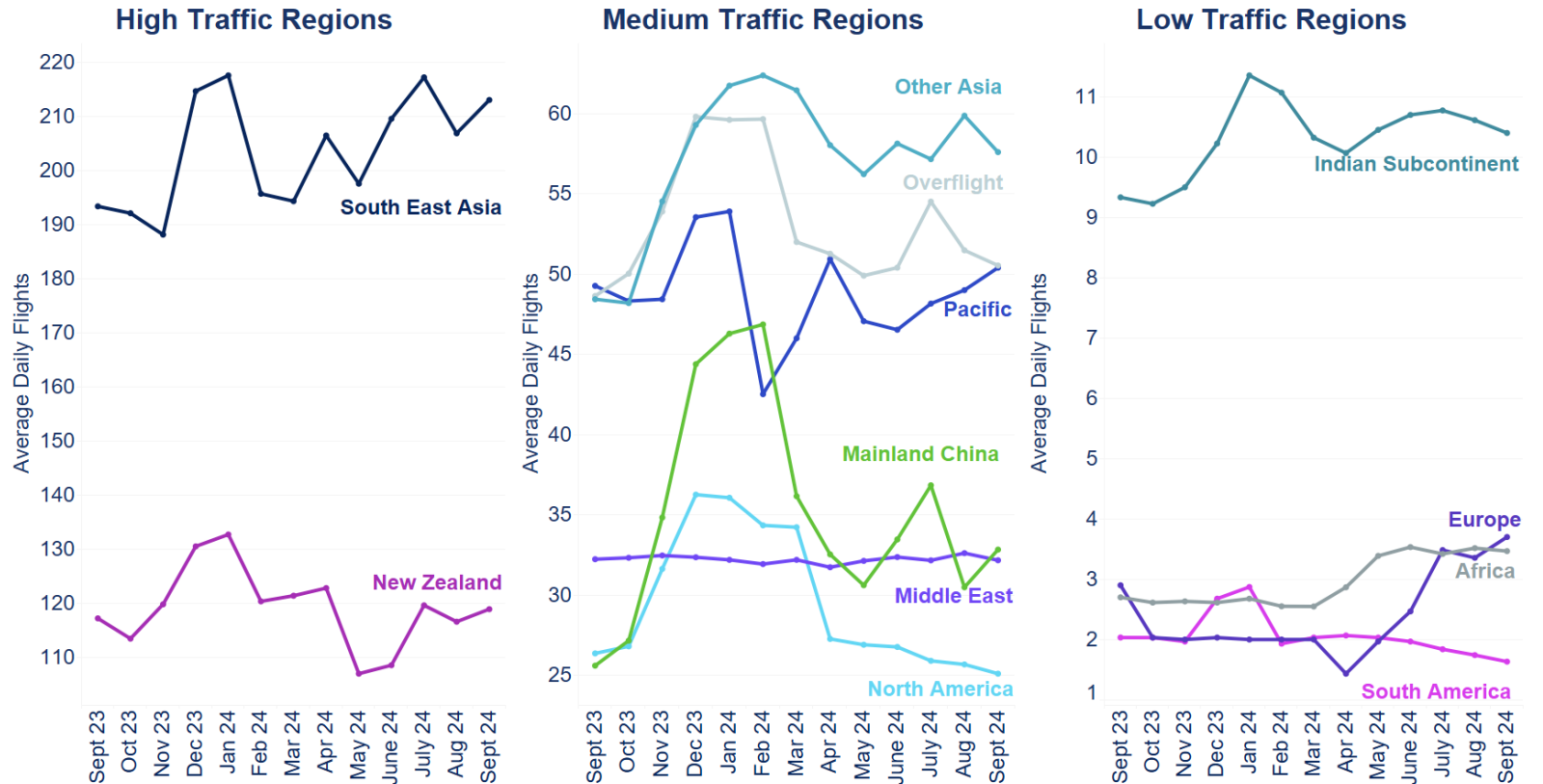
Source: Airservices ODAS (includes airline flights only).
For multi-leg flights, legs that start and end outside Australian airspace are not included.

Australian fleet

This month, two new aircraft models, the A321(LR) and A220, have entered service. Pilots are now training for the latest A321(XLR) model in the A320neo large narrowbody family, which are expected to be delivered in 2025, with an extended range of 700 NM more than the previous A321(LR) model enabling potential new routes.

Figure 18. Aircraft on order and service status for Jetstar, Qantas Group, and Virgin Australia Group (September 2024 and change vs August 2024) – as of 1 October 2024.
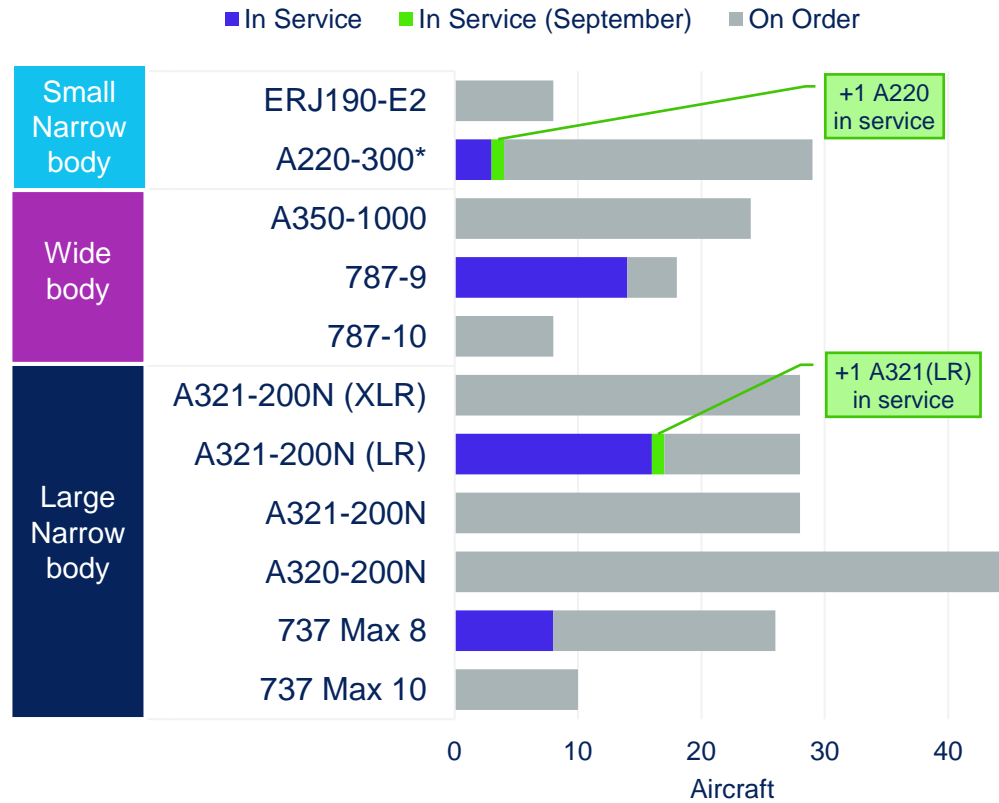
Source: Centre for Aviation Fleet (CAPA) data.
* Source: Airservices ODAS.

Figure 19. Max seat capacity vs range of aircraft on order for Jetstar, Qantas Group, and Virgin Australia Group
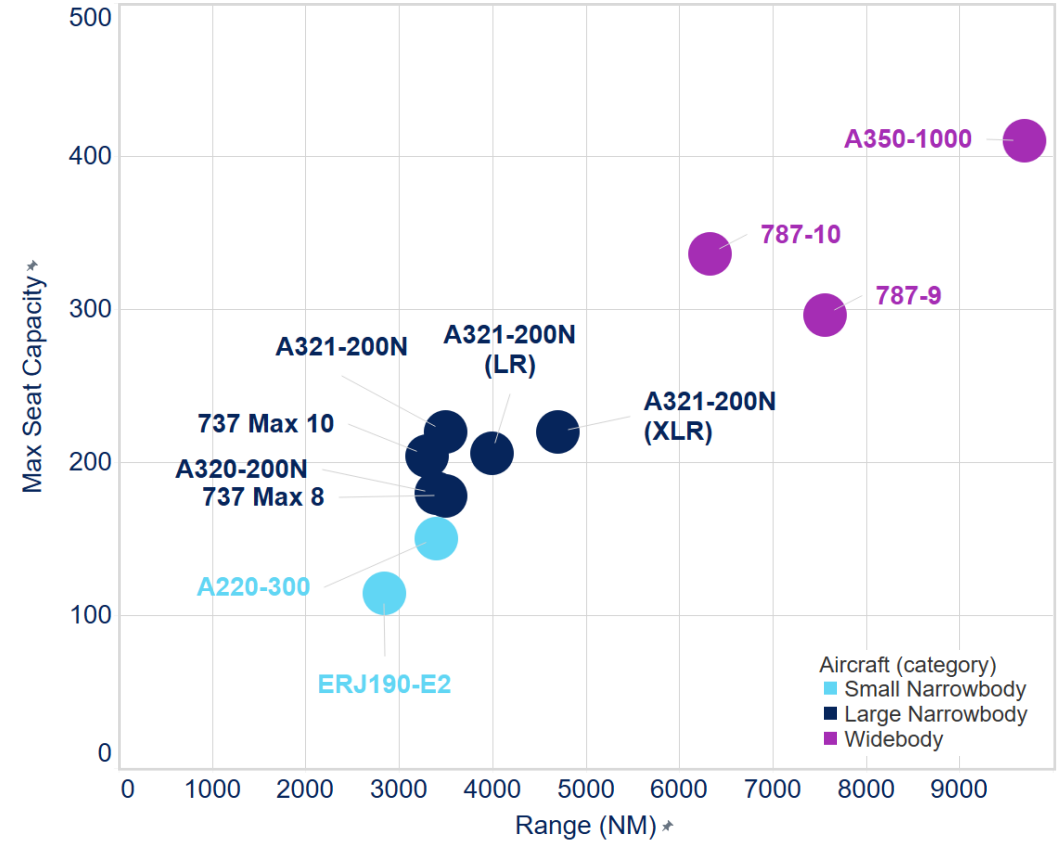
Source: as per manufacturer. Max seat capacity for single class (ERJ190-E2), three class (A350-1000), and two class (all others).

12

Australian aviation network performance

On-Time Performance (OTP) in the previous month

Overall industry OTP in Australia improved in August 2024 after declining since April 2024. Airlines have continued to focus on first rotation performance through measures such as optimising passenger boarding processes to reduce delays. Globally, there was an improvement in the overall performance of the industry in August 2024.

Figure 20. Total industry OTP and cancellations (data available up to 31 August 2024 based on latest BITRE data release).
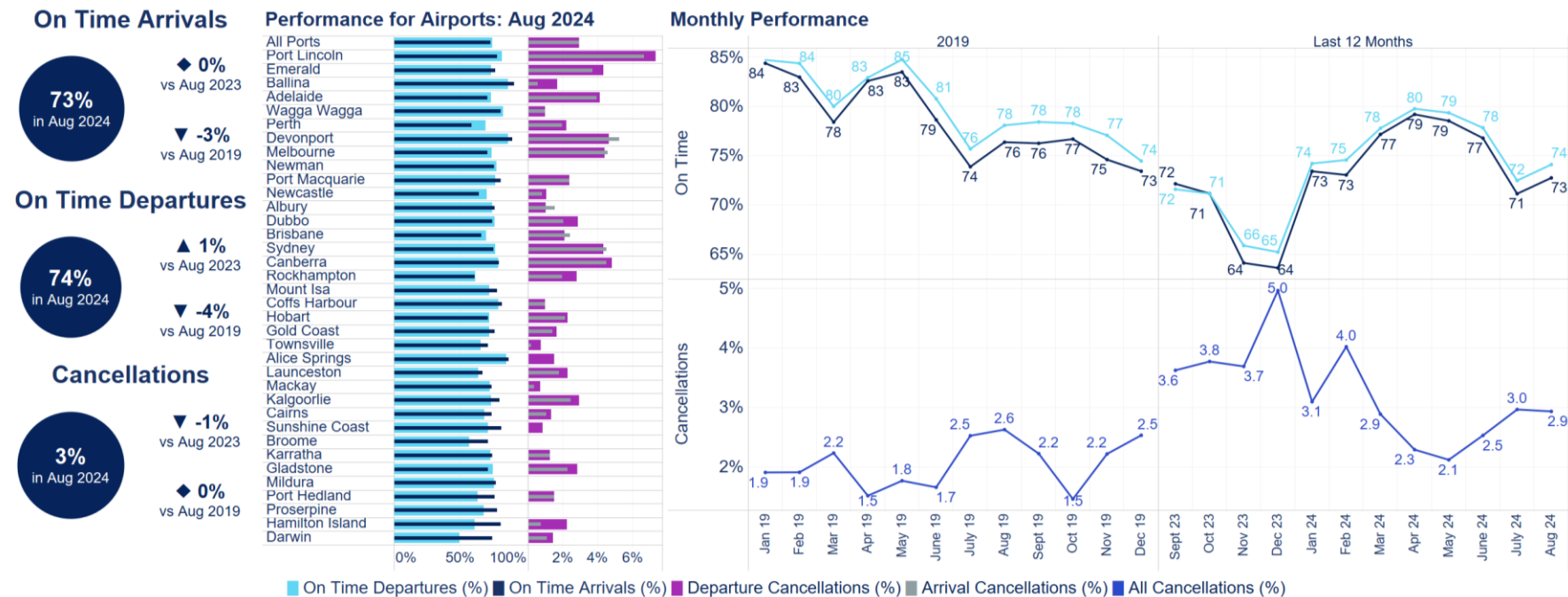
Figure 21. Arrival OTP for top ten performing airlines by region (August 2024) in comparison to Australia's top eight airlines.

Region	On Time Arrivals	Change from previous month
Asia Pacific	75%	▲1%
Europe	79%	▲4%
Latin America	82%	- 0%
Middle East & Africa	80%	- 0%
North America	72%	▲3%
Australia	73%	▲2%

Source: BITRE for Australian data (website) and Cirium (website).

Lead indicators of OTP: Delay components

In September 2024, the major components of delays decreased, suggesting that the improvement in on-time performance (OTP) will continue pending the release of the BITRE data. Air traffic flow management (ATFM) delays also decreased at Sydney, Brisbane and Perth, and remain steady at Melbourne.

Figure 22. Delay components of OTP and average flight values by airport per month
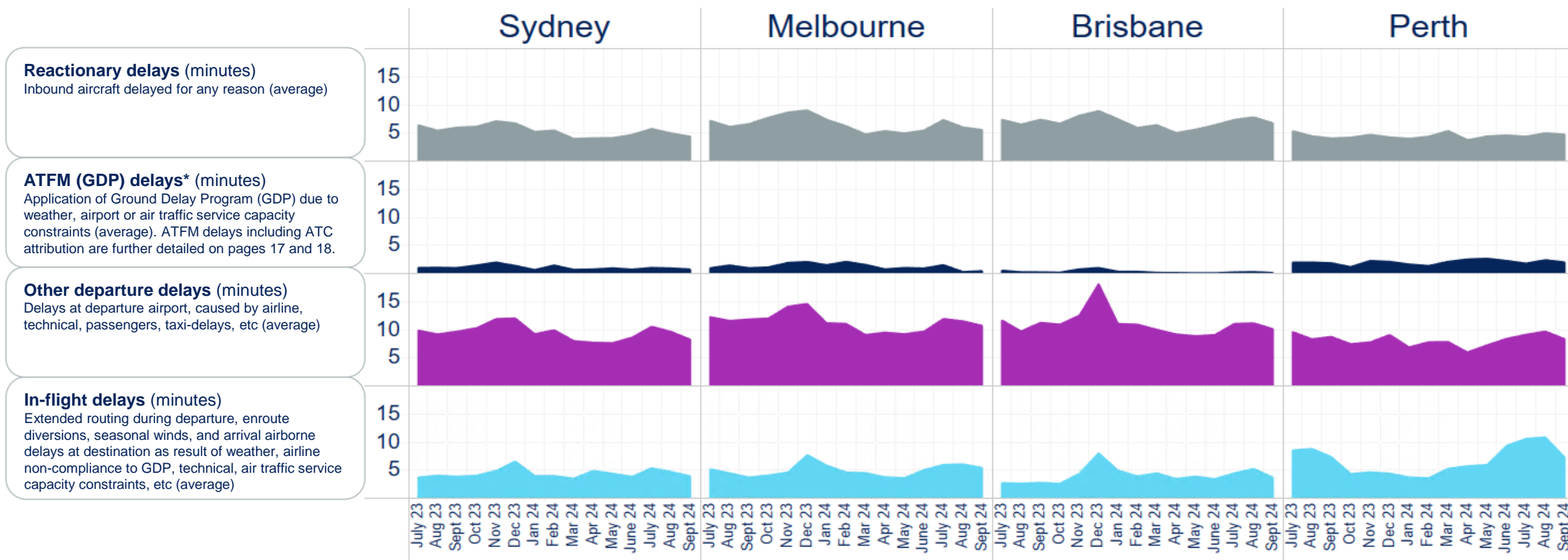
Reactionary delays (minutes)
Inbound aircraft delayed for any reason (average)

ATFM (GDP) delays* (minutes)
Application of Ground Delay Program (GDP) due to weather, airport or air traffic service capacity constraints (average). ATFM delays including ATC attribution are further detailed on pages 17 and 18.

Other departure delays (minutes)
Delays at departure airport, caused by airline, technical, passengers, taxi-delays, etc (average)

In-flight delays (minutes)
Extended routing during departure, enroute diversions, seasonal winds, and arrival airborne delays at destination as result of weather, airline non-compliance to GDP, technical, air traffic service capacity constraints, etc (average)

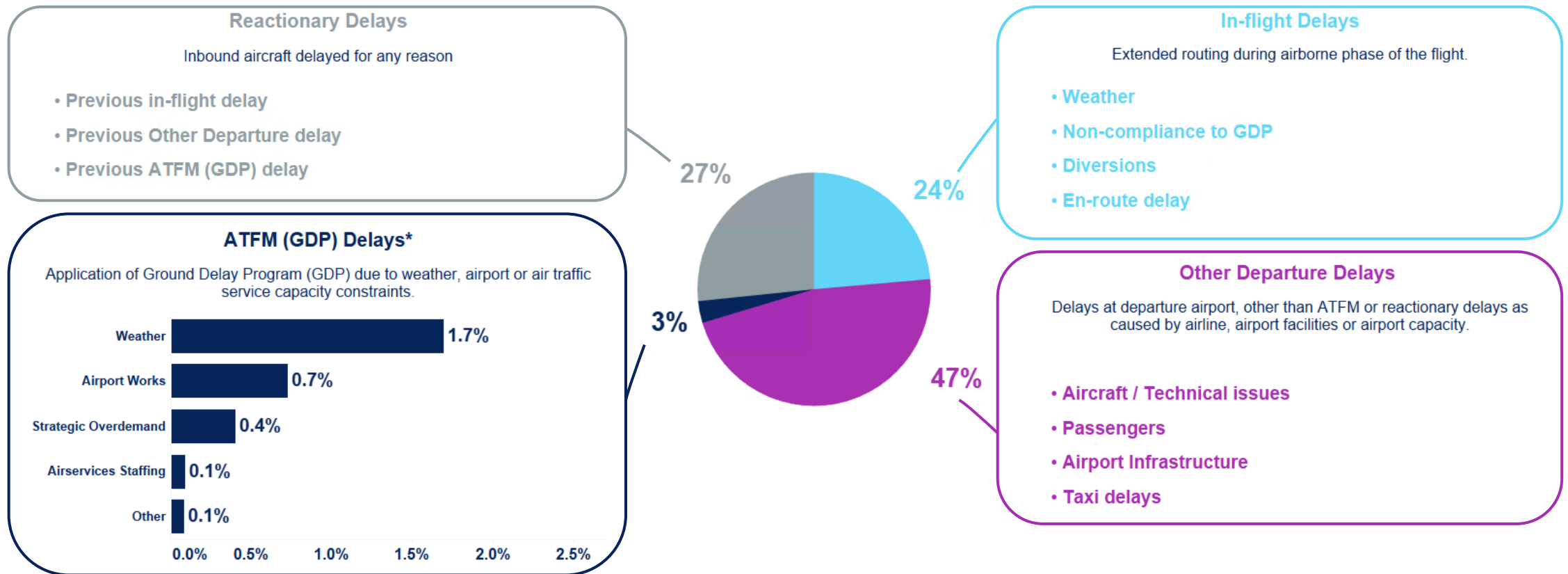Source: Airservices ODAS (includes airline flights only).
The delay presented is an estimate based on domestic flight data available to Airservices. Airservices is working with airlines and stakeholders to refine the estimation method and identify complementary data to better understand causal factors.

*The ATFM system allows airlines to change GDP slots to respond to reactionary delays, which may allow a GDP slot to be obtained closer to the updated departure time. Therefore, the additional ground delay as result of a GDP can appear low but should be considered in conjunction with reactionary delay.

Breakdown of delay components

'Other' departure delays are the largest component of overall delays in the network, followed by reactionary delays and in-flight delays. ATFM delays contribute to a small proportion of less than 3%, primarily driven by weather. Complementary airline data is needed to further understand the contributions within the largest categories to improve insights to network performance.

Figure 23. Breakdown of delay components for major Australian airports (September 2024)

Reactionary Delays

Inbound aircraft delayed for any reason

- Previous in-flight delay
- Previous Other Departure delay
- Previous ATFM (GDP) delay

27%

In-flight Delays

Extended routing during airborne phase of the flight.

- **Weather**
- **Non-compliance to GDP**
- **Diversions**
- **En-route delay**

24%

ATFM (GDP) Delays*

Application of Ground Delay Program (GDP) due to weather, airport or air traffic service capacity constraints.

Weather	1.7%
Airport Works	0.7%
Strategic Overdemand	0.4%
Airservices Staffing	0.1%
Other	0.1%

0.0% 0.5% 1.0% 1.5% 2.0% 2.5%

3%

Other Departure Delays

Delays at departure airport, other than ATFM or reactionary delays as caused by airline, airport facilities or airport capacity.

- **Aircraft / Technical issues**
- **Passengers**
- **Airport Infrastructure**
- **Taxi delays**

47%

Source: Airservices ODAS (includes airline flights only).
The delay presented is an estimate based on domestic flight data available to Airservices. Airservices is working with airlines and stakeholders to refine the estimation method and identify complementary data to better understand causal factors.
*The ATFM system allows airlines to change GDP slots to respond to reactionary delays. Therefore, the additional ground delay as result of a GDP can appear low but should be considered in conjunction with reactionary delay.

Ground Delay Program (GDP) application

September 2024 saw overall favourable weather conditions, resulting in the lowest application of GDPs in more than a year. Industry compliance with GDPs improved slightly after trending downwards over the preceding three months. Despite the reduction of GDP usage, arrival airborne delay remains at similar levels as in previous months. Perth single-runway usage doubled since early August due to ongoing runway works scheduled until mid-November.

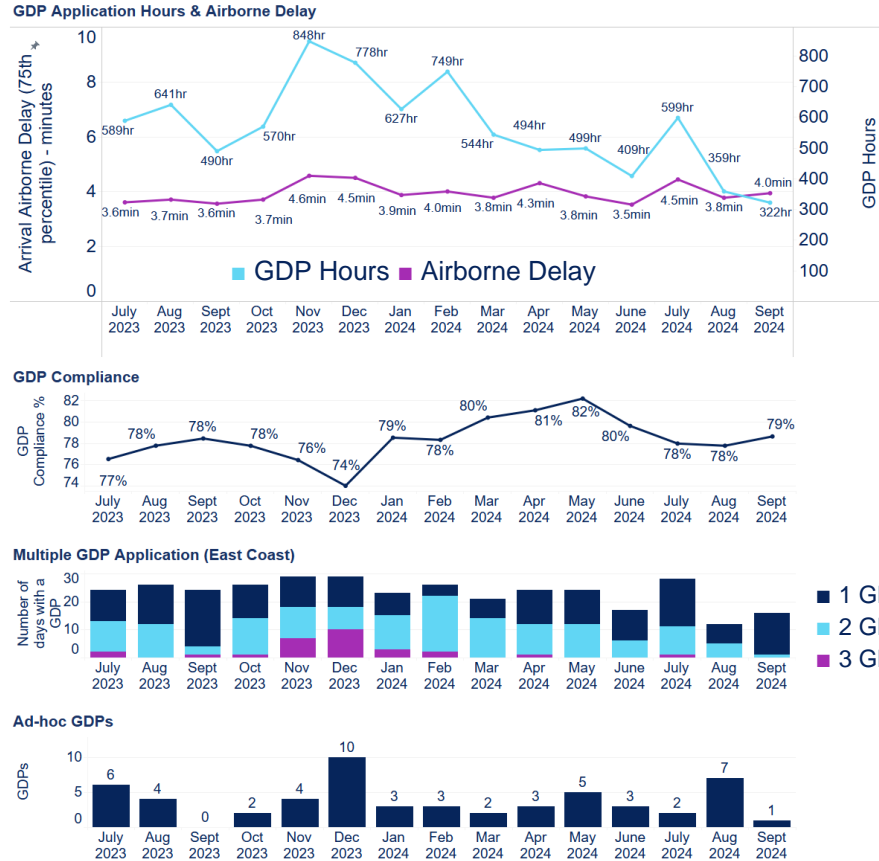**Figure 24. GDP application measures by month**

Figure 25. ATFM program delay allocated vs. absorbed by operators. Incurred ATFM delay is lower than allocated delay upon first publication of a GDP as airlines optimise slots and adjust preferred operating times throughout the day to account for reactionary delays.
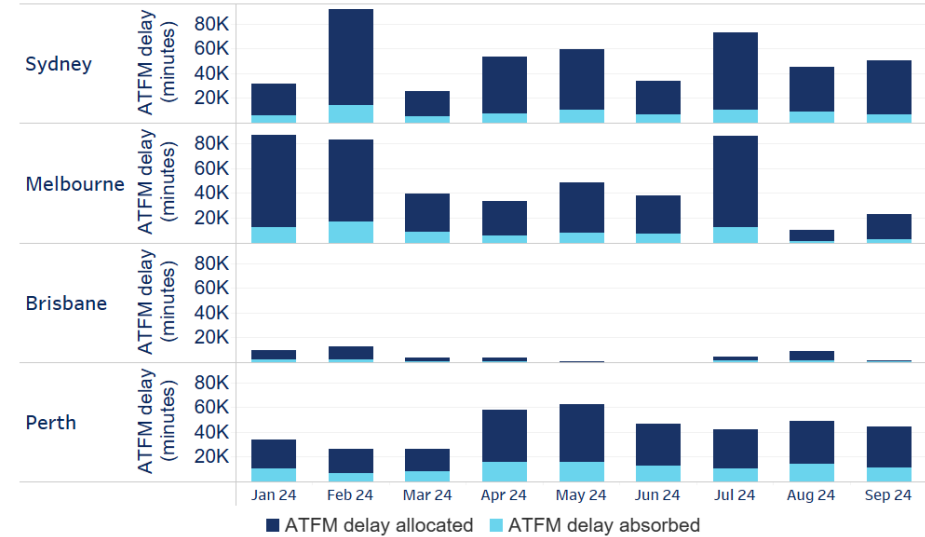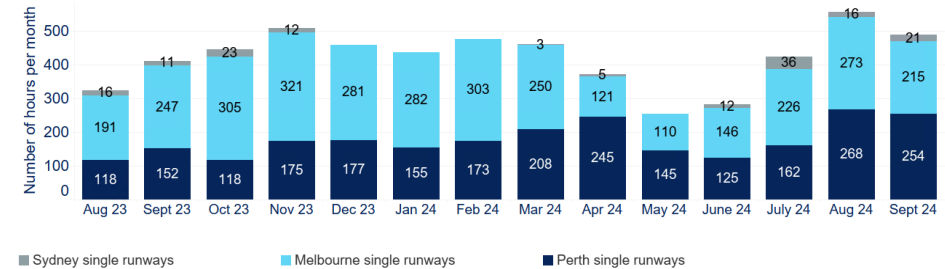

Figure 26. Single runway mode utilisation by month

Air traffic management outcomes

Weather was the main driver for ATFM delays in September 2024 followed by airport infrastructure (e.g. runway works at Perth) and airline demand exceeding allocated slot parameters at Perth. There were no Airservices-attributable ATFM delays at Sydney, Melbourne or Brisbane in September 2024, reflecting ongoing improvements in service performance and a particular focus on resilience leading into the September school holidays.

Figure 27. Airservices attribution of ATFM outcomes (September 2024)

0.2% — Proportion of **flights impacted** by Airservices capacity constraints, out of all flights

3% — Proportion of **ATFM delays** attributable to Airservices; All ATFM delay is typically less than 5% of all delays, and only a portion of ATFM delays are attributable to Airservices (shown here)

0.4% — Proportion of **arrival cancellations** attributable to Airservices

From September 2024, "Non-Airservices" ATFM delay is categorised further by Weather, Airport Works, Strategic Overdemand and Other.
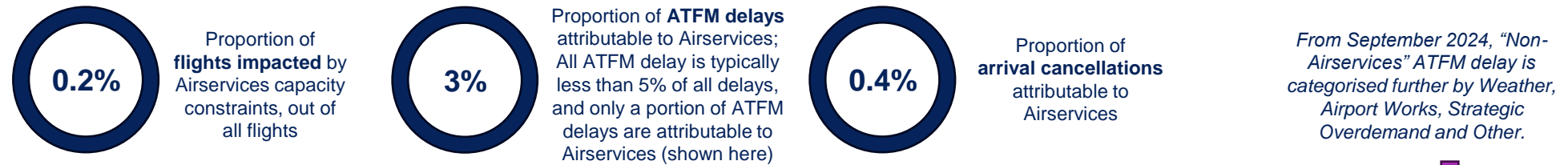
Figure 28. Relative ATFM (GDP) delay and cancellations attributed to Airservices (delay is relative to ATFM measures, not relative to total delays)
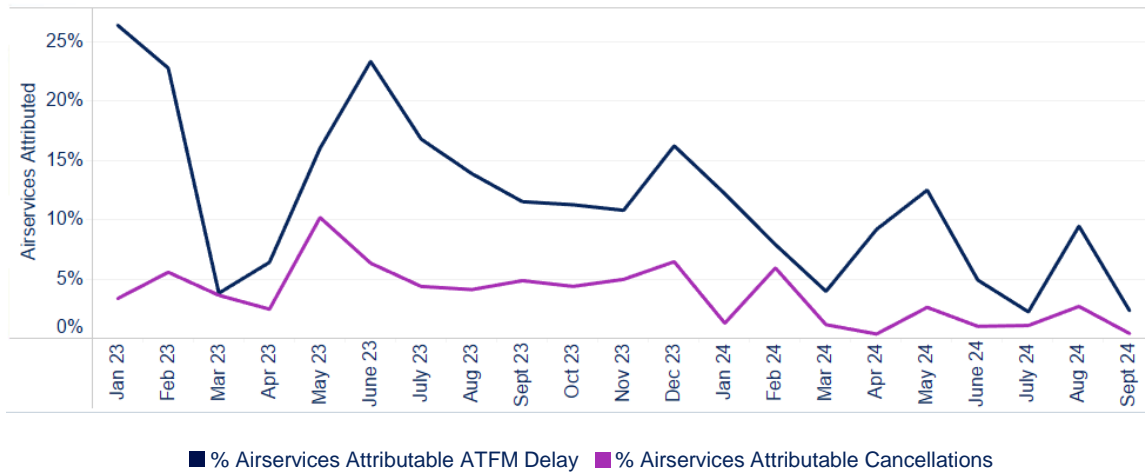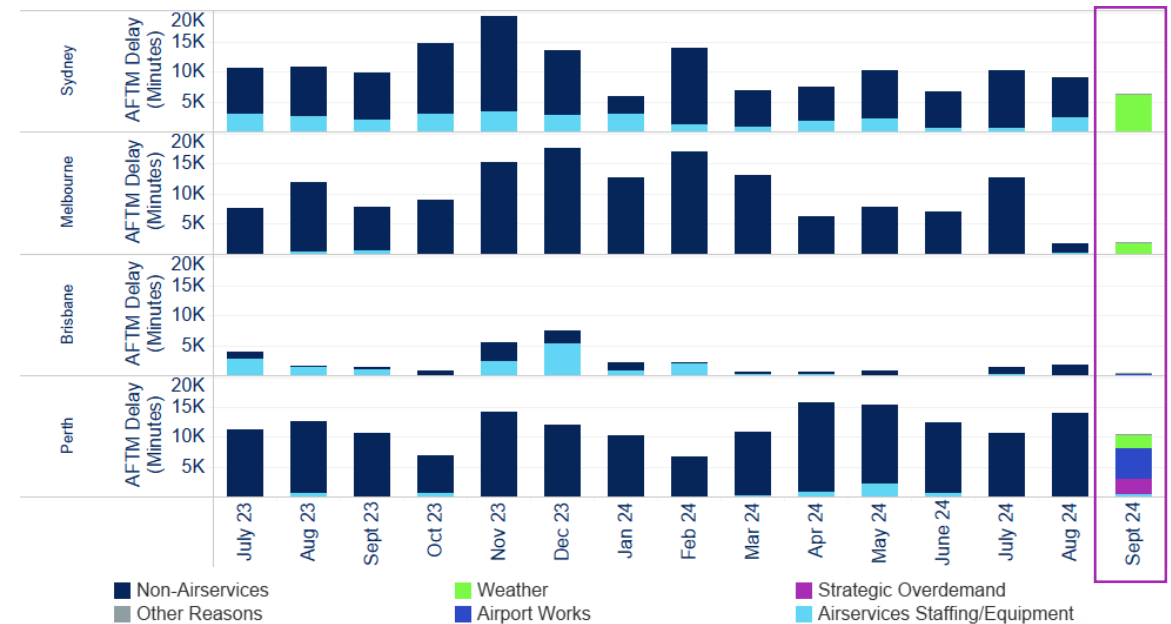

- % Airservices Attributable ATFM Delay
- % Airservices Attributable Cancellations

Figure 29. ATFM (GDP) delay by airport per month

- Non-Airservices
- Other Reasons
- Weather
- Airport Works
- Strategic Overdemand
- Airservices Staffing/Equipment

Source: Airservices ODAS. Flights impacted are estimated as scheduled to arrive at the four major airports during a period with slot reduction attributable to Airservices. ATFM delay (GDP) and flight cancellations attributable to Airservices are only estimated for flights arriving at these airports, including measuring the flow-on effects into the subsequent hours at the arrival airport. More detailed ATFM delay reporting can be found at Australian Aviation Network Performance - Airservices (airservicesaustralia.com)
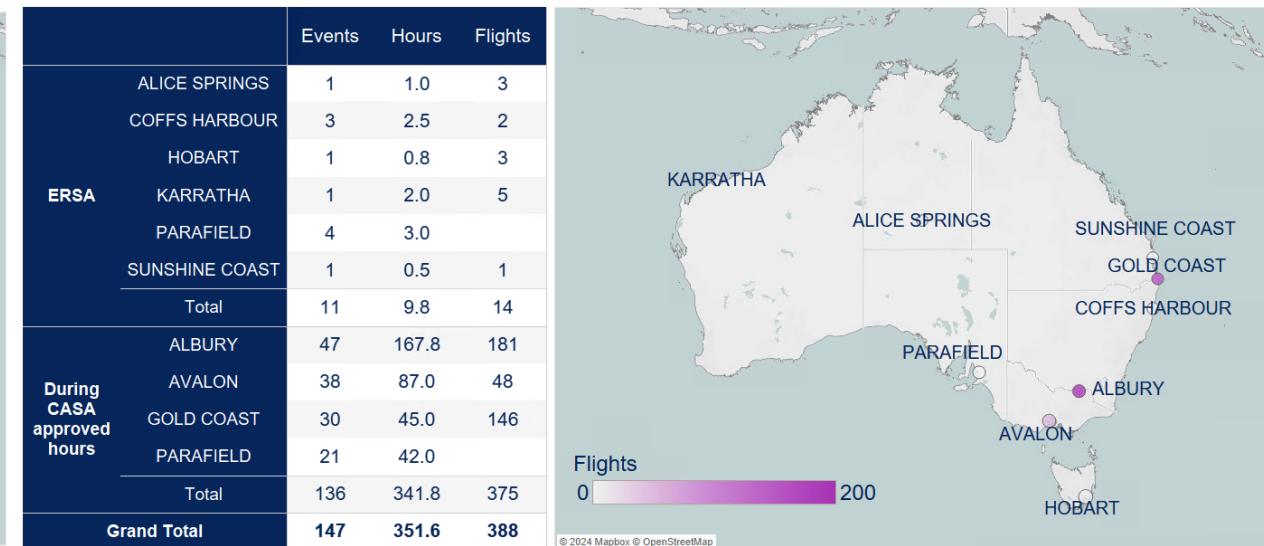
Air traffic service provision

Airspace service variations in September were limited to a smaller number of groups. Tower services showed an improvement impacting fewer locations and services. This is primarily attributed to Avalon tower having returned to published hours in mid-September. The consistency of our service in areas such as metropolitan towers still needs to improve to return to long-term performance expectations, and this remains our ongoing focus.

Figure 30. Number of events, hours, and flights estimated to operate during the periods when air traffic services delivered varied from published levels (September 2024)

Variation to Published Services Airspace Sector Groups: September 2024

	Events	Hours	Flights
GWYDIR	3	19.9	42
North QLD TCU	13	16.8	37
YBNA (SFIS)	14	20.0	23
Grand Total	**30**	**56.7**	**101**

Variations to Published Services Airport Air Traffic Control Towers: September 2024

		Events	Hours	Flights
ERSA	ALICE SPRINGS	1	1.0	3
	COFFS HARBOUR	3	2.5	2
	HOBART	1	0.8	3
	KARRATHA	1	2.0	5
	PARAFIELD	4	3.0	
	SUNSHINE COAST	1	0.5	1
	Total	11	9.8	14
During CASA approved hours	ALBURY	47	167.8	181
	AVALON	38	87.0	48
	GOLD COAST	30	45.0	146
	PARAFIELD	21	42.0	
	Total	136	341.8	375
Grand Total		**147**	**351.6**	**388**

Source: Airservices ODAS (General aviation, military, and government flights are excluded).

Variations to published services comprise of Temporary Restricted Areas and tower closure periods. During the periods of variations to published services at regional aerodromes, services in adjacent Class G airspace are generally unaffected (e.g. provision of flight, traffic information and safety alerting). Service variations are with respect to published services as per ERSA including any approvals by the Civil Aviation Safety Authority (CASA) for temporary amendments.

Flights shown are estimated approximations by historic airline, charter, cargo and medical flights that typically operate during the periods of variations to published services, noting the exact impacts to flights cannot be directly inferred from information on flight times or tracks. Airservices is working with airlines to refine the estimation method to better understand the impact of variations to published services.

When there is a variation to published Surveillance Flight Information Service (SFIS) at Ballina, standard Class G services as regulated by CASA are still provided by Brisbane Air Traffic Services Centre.

Runway Occupancy Time (ROT)

During peak periods, utilisation of rapid exit taxiways are key for reducing runway occupancy time. Preferred exits* were used 85% of the time at major airports over the past year during peak periods, but recent ongoing works at Brisbane Airport have reduced the use of preferred exits on Runway 01R, increasing occupancy time. Data sharing with airports and airlines is continuing to seek improvements in runway occupancy time.

Figure 31. Arrival ROT (75th percentile, seconds) and preferred exit usage by runway per month (July to September 2024), and preferred exit usage by airport per month (October 2023 to September 2024) during peak periods at major capital-city airports
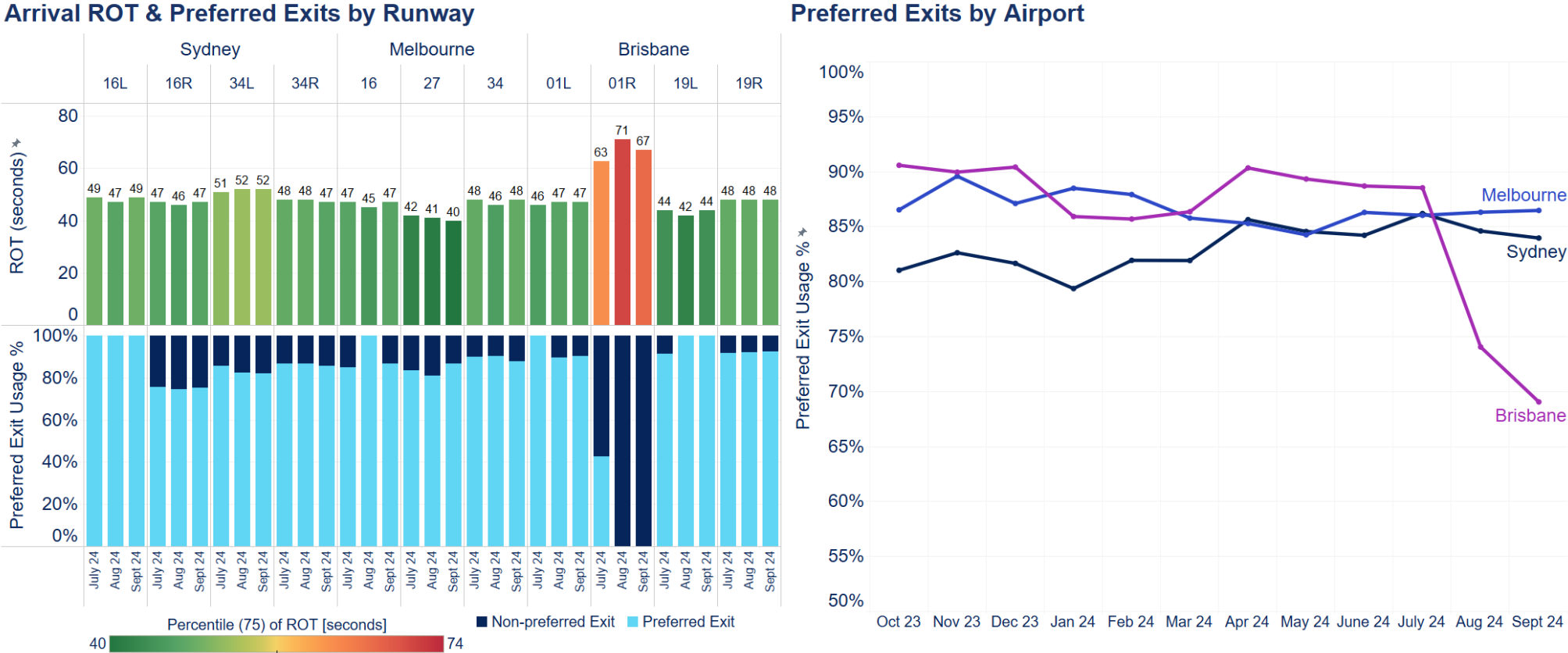
Source: Airservices ODAS. Data for Perth Airport is in currently unavailable.
*Preferred exits as per AIP.

For more information
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airservices
australia