



Australian Aviation Network Overview

November 2024





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.

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Executive Summary

In November 2024, the Australian aviation network recorded a three per cent decrease in daily flights compared to the previous month driven by a seasonal dip in domestic traffic. However, double-digit growth this month from several international airlines is a positive signal of increasing capacity ahead of a busy summer holiday season.

Based on the latest available data from the Bureau of Infrastructure and Transport Research Economics (BITRE), the cancellation rate in October was the lowest it has been since 2021 and about half the rate of the same time last year. This improvement demonstrates a strong focus across industry on maximising flight completion rates for more reliable passenger journeys. Overall OTP has stabilised around 75 per cent, but still below international benchmarks.

Weather disruptions intensified along the East Coast in the second half of November and are expected to remain the key challenge throughout this summer. When load factors are high, the ability to mitigate the delay impact could be limited. This is shown in the rapid deterioration of network performance following unplanned events such as runway closures due to aircraft emergency or extreme weather at major airports. To enhance preparedness and resilience, a senior-level daily network meeting has been introduced to align risk assessment, coordinate joint responses and increase trust in network decisions.

Airservices service performance is continuing to improve. In November, only 0.1 per cent of total network flight delays were attributed to Airservices. Overall, air traffic service variations reached their lowest levels since commencing reporting on these metrics in 2022.

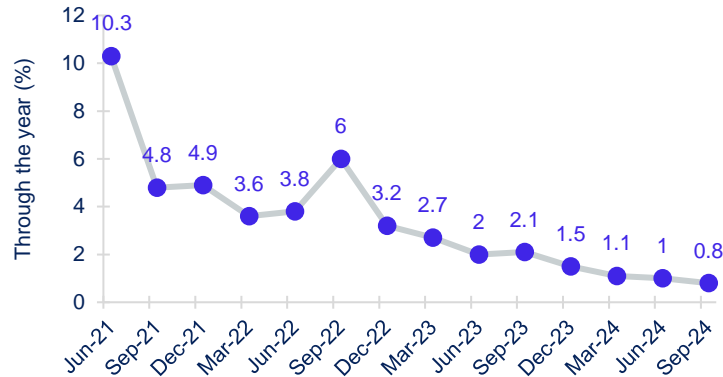
We are focused on maintaining this momentum and have been preparing for the summer holiday period. Additional layers of resilience are being built into rosters with standby arrangement in key locations, and operational coordination with stakeholders has been strengthened.

Economic and social trends

Economic factors

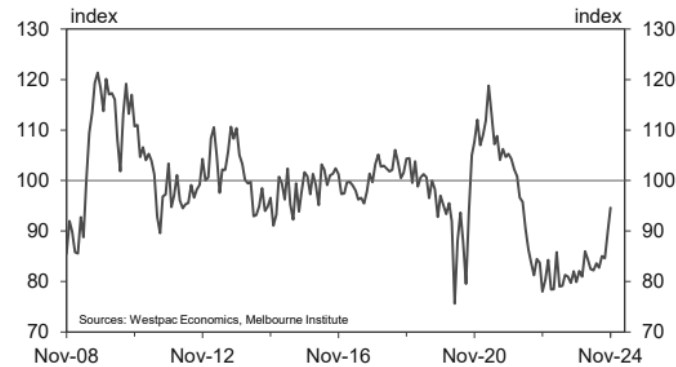
Australia's economy saw its slowest annual growth rate since the pandemic, at 0.8% in the September quarter. However, rising consumer confidence, strong public spending, and increased international travel demand are positive signs for our sector. Airfares have risen recently, influenced by reduced competition, seasonal demand, and volatile fuel prices.

Figure 1. Real GDP growth for Australia.



Source: ABS ([website](#)) – data released 4/12/2024 for September 2024

Figure 2. Westpac-Melbourne Institute Consumer Sentiment Index.



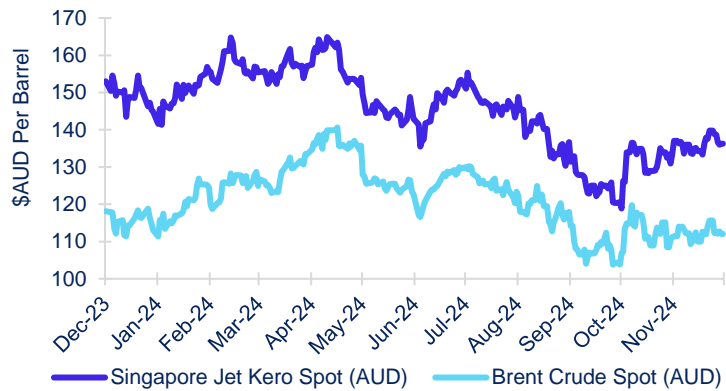
Source: Westpac ([website](#))

Figure 3. International visitor arrivals (short term) from top 10 source countries (September 2024 vs September 2023).

#1 New Zealand	#2 China	#3 UK	#4 USA	#5 India
-8%	+25%	+17%	+14%	+13%
#6 Japan	#7 Singapore	#8 South Korea	#9 Malaysia	#10 Indonesia
+30%	+1%	+8%	+40%	+22%

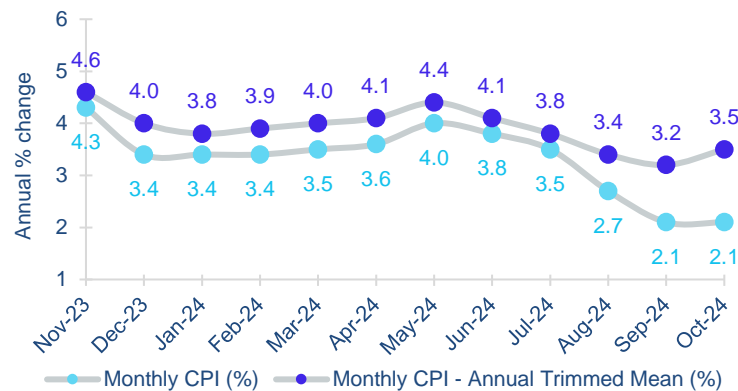
Source: ABS ([website](#)) – data released 12/11/2024 for September 2024

Figure 4. Jet fuel and Brent crude oil prices.



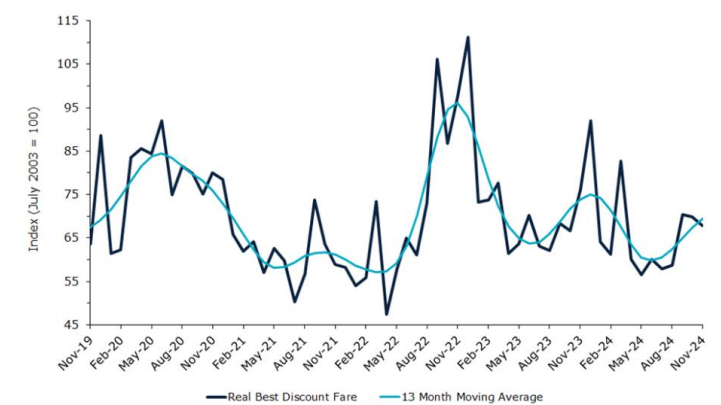
Source: Bloomberg

Figure 5. Consumer Price Index (CPI) Indicator.



Source: ABS ([website](#)) – data released 27/11/2024 up to October 2024

Figure 6. Domestic airfares (best discount).



Source: BITRE ([website](#))

Social factors

Aircraft noise complaints have decreased over the last quarter, following the completion of Brisbane runway works and resumption of regular airspace operations. However, Perth has seen a slight increase in complaints due to ongoing runway works. Community and industry consultations are ongoing to raise awareness of essential aviation safety requirements while collaborating on noise mitigation solutions to benefit local residents.

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

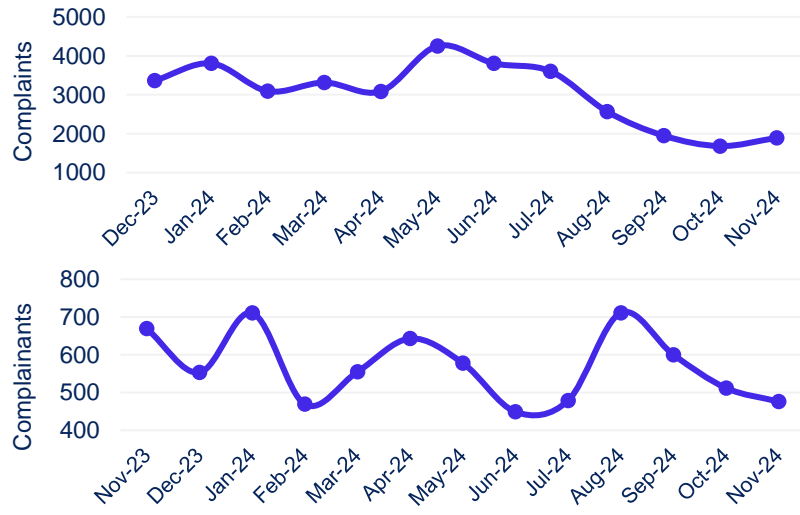


Figure 8. Airport aircraft noise complaints, complainants, and complaints by complainant per month.

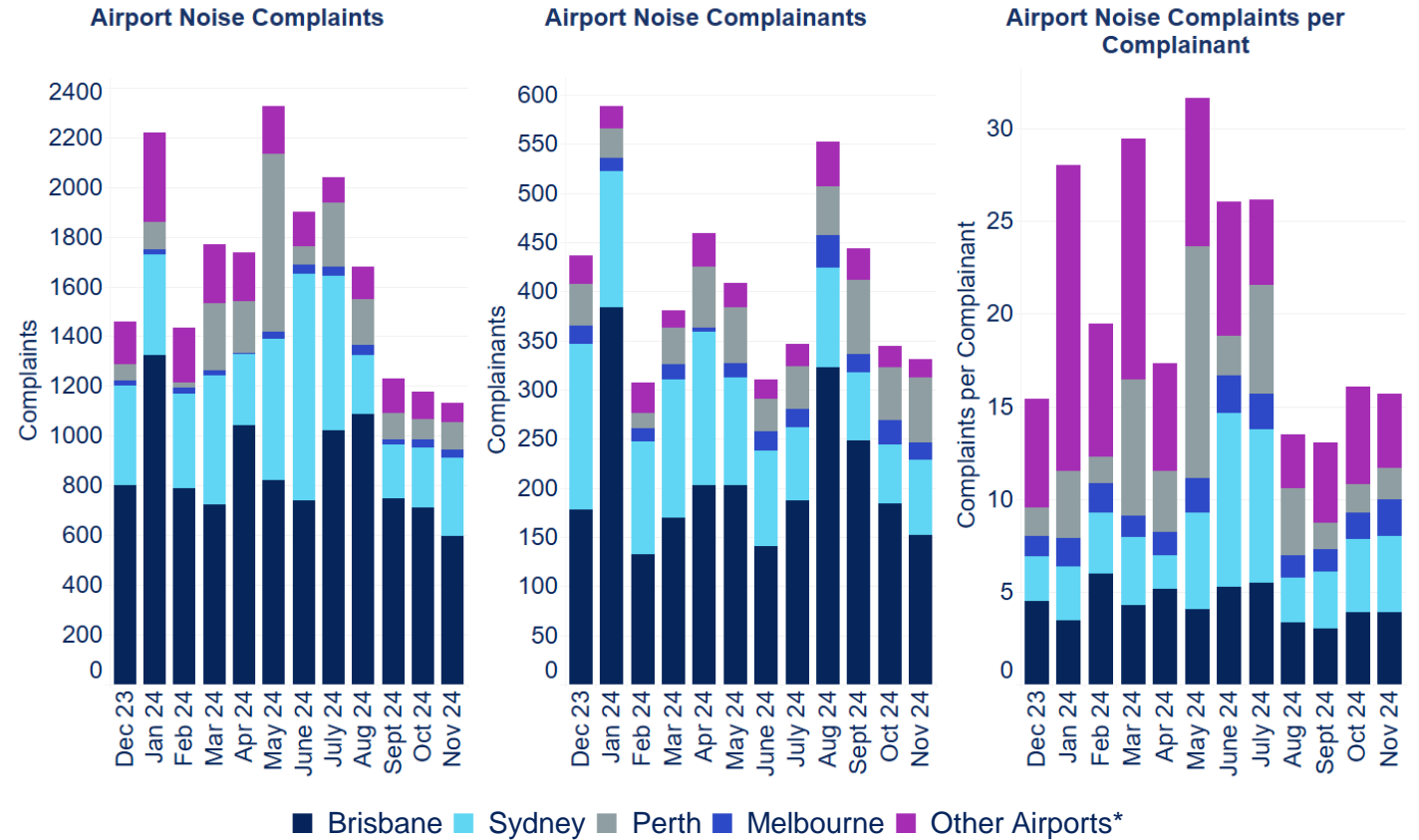
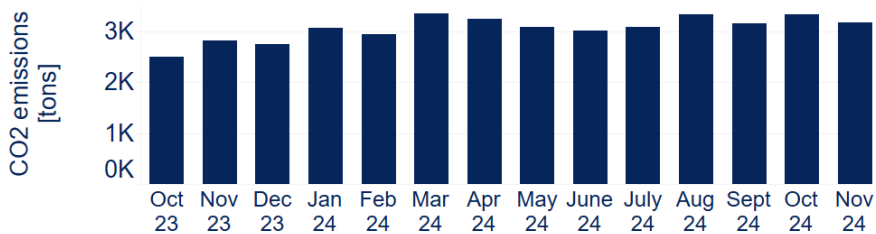


Figure 9. CO2 emissions savings from optimised User Preferred Routes (UPR) across oceanic and cross-continental airspace per month.



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

In November, the Australian aviation network recorded a 3% contraction in daily flights. A slowdown in domestic flights following a busy school holiday period has been offset by a 2.7% increase in international flights.

Average Daily Flights

(November 2024 and % of November 2023)

3,787
100%

Total Domestic Flights

(November 2024 and % of November 2023)

95,191
99%

Total International Flights

(November 2024 and % of November 2023)

18,419
105%

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

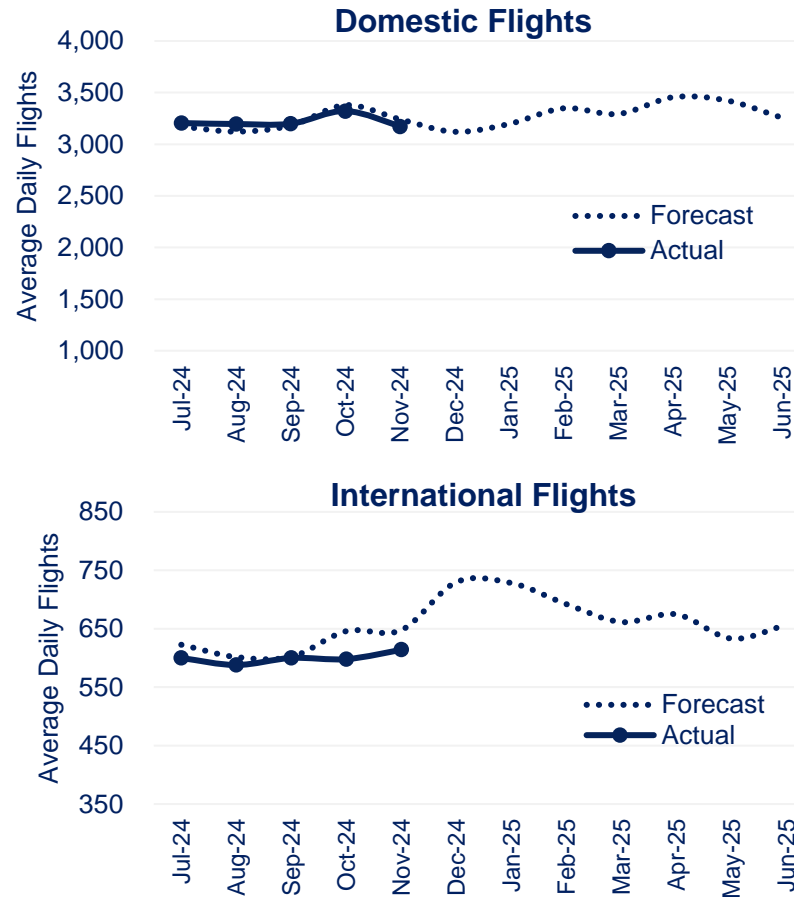
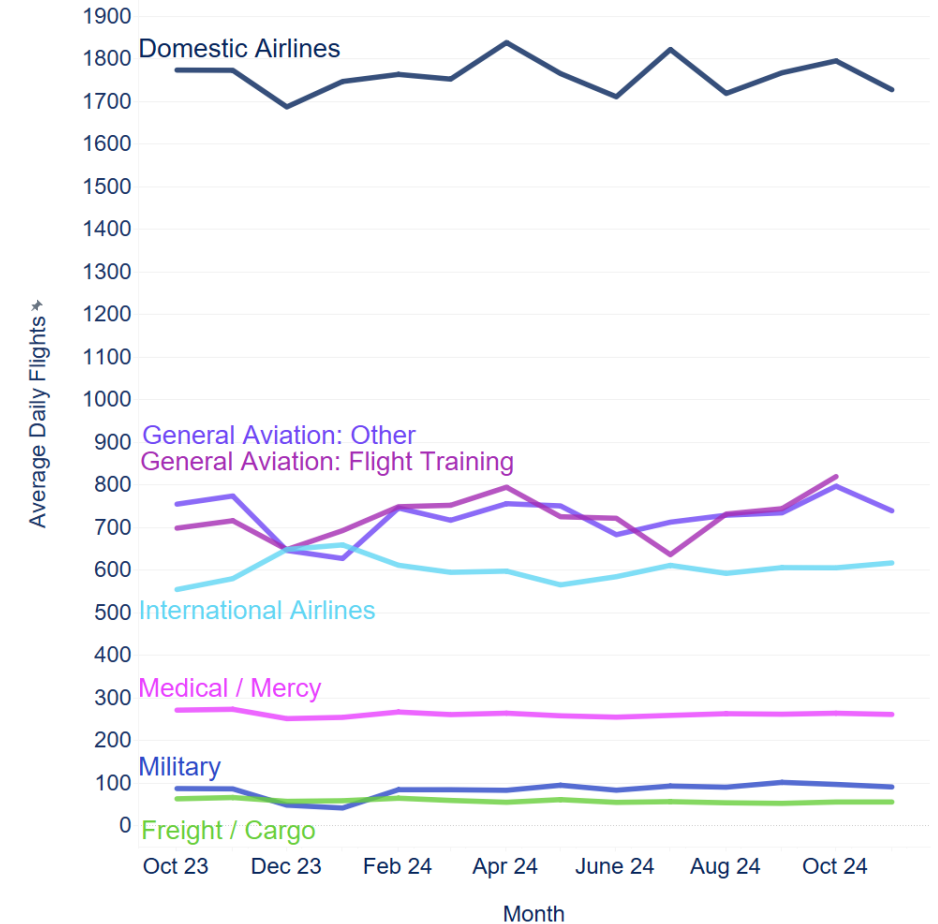


Figure 11. Average daily flights by industry segment per month.



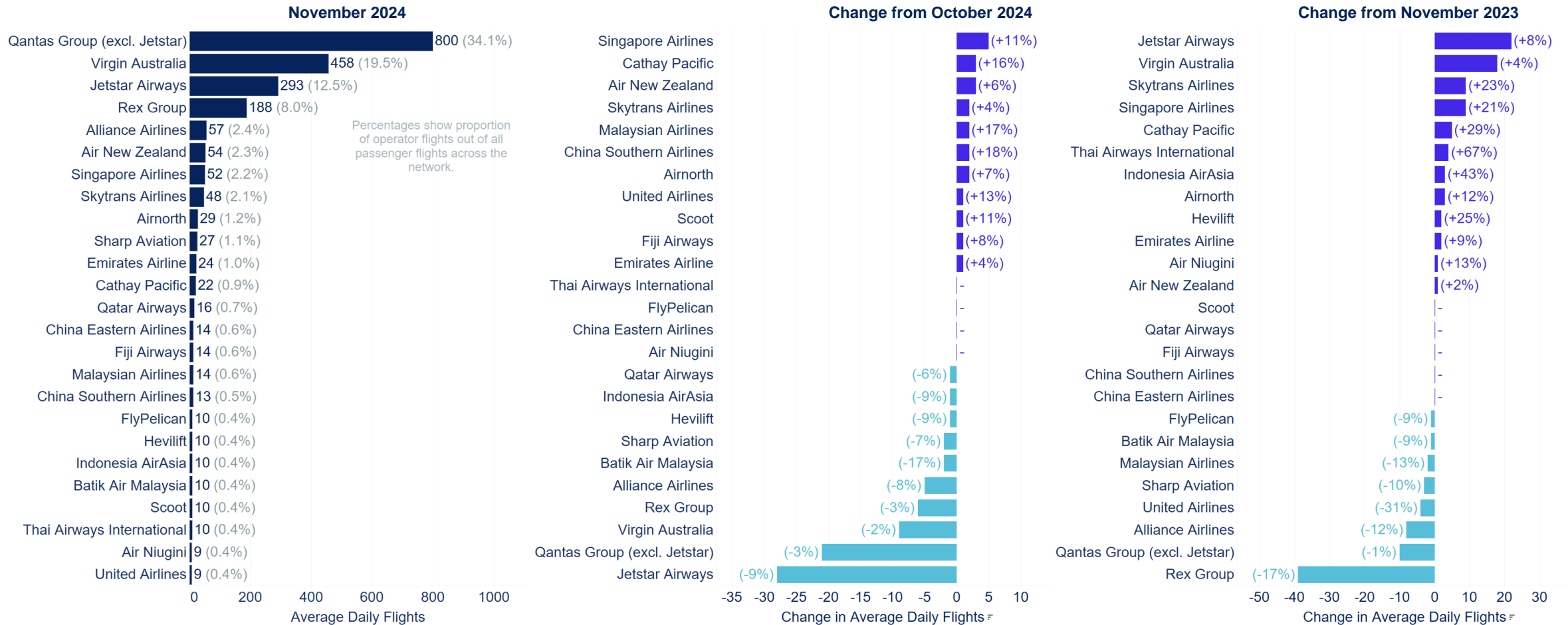
Source: Airservices ODAS (excludes helicopters).
Data for 'General Aviation: Flight Training' is one month in arrears.

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.

Top aircraft operators

The network growth in this month is driven by several major international airlines recording double-digit growth from the previous month. This is a positive sign leading into the summer holiday period.

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

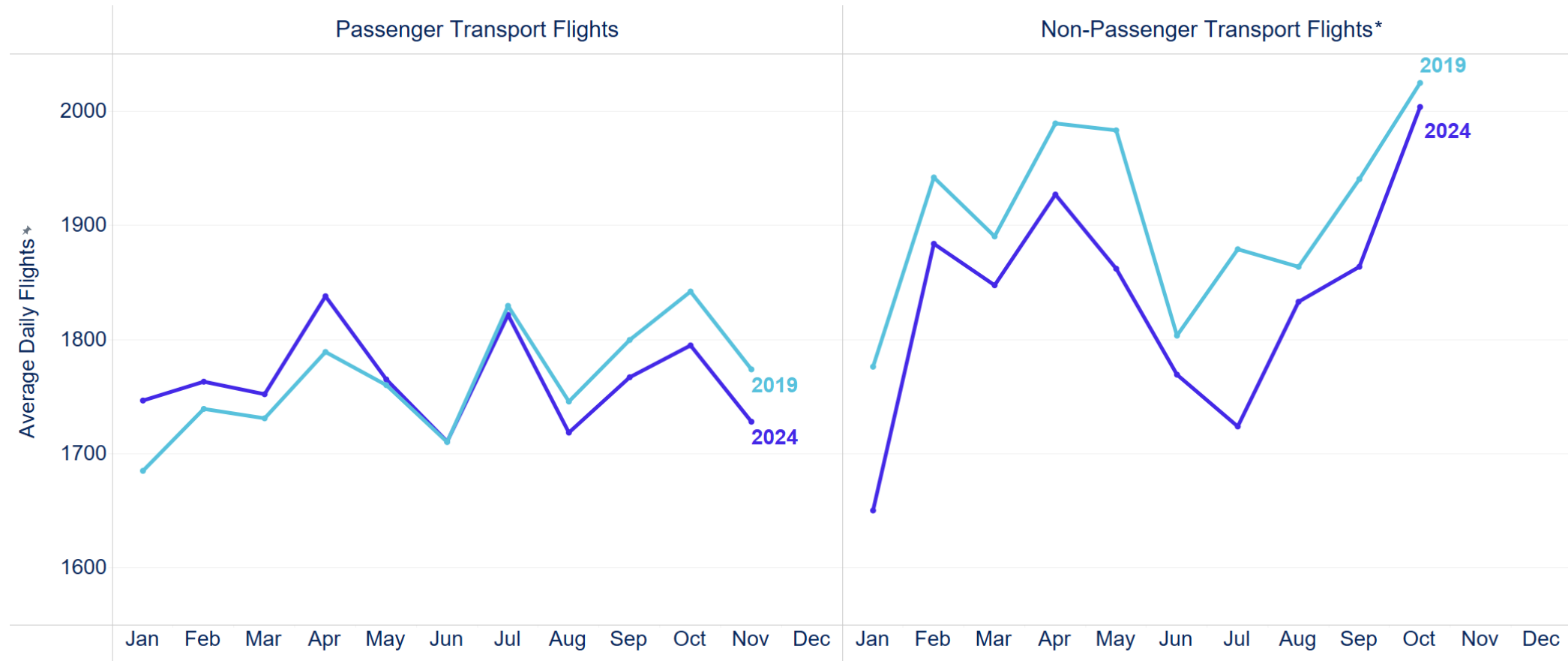


Source: Aircservices ODAS (includes airline flights only).

Domestic network

The domestic network is now closely aligning to historical seasonal patterns across all segments. As our sector looks to create the conditions for sustainable growth, we are refining the strategic network planning approach with industry to proactively examine key seasonal factors and optimise capacity plans in the short, medium and long term.

Figure 13. Seasonality in domestic flights in January – November 2024 compared to the same period in 2019.

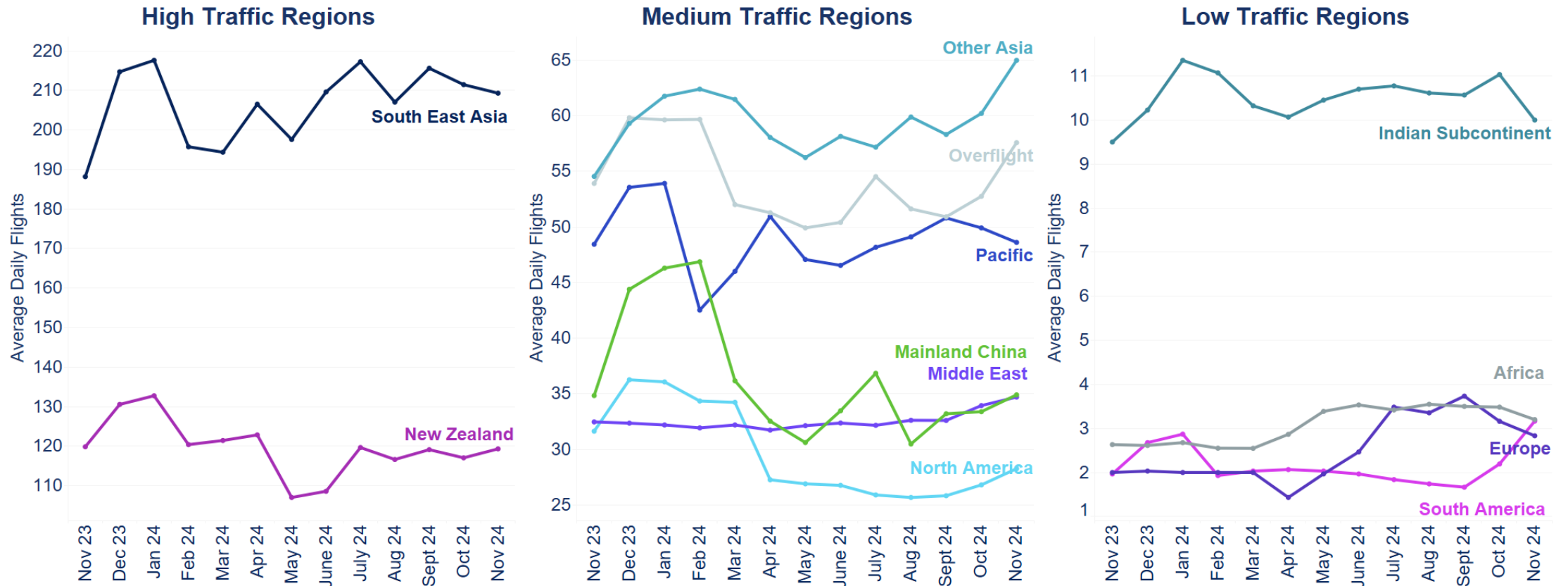


Source: Airservices ODAS (excludes helicopters).
 Non-passenger transport includes General Aviation, Medical / Mercy, Freight / Cargo.
 * The data for 'General Aviation: Flight Training' is one month in arrears.

Traffic flows from international markets

International traffic increase from last month is mainly driven by flights connecting Dubai, Hong Kong, China, and Japan with Brisbane, Adelaide and Perth. Recent updated air service arrangements with seven countries along with tourism campaigns are expected to further stimulate international travel demand.

Figure 14. Average daily flights by international markets per month.

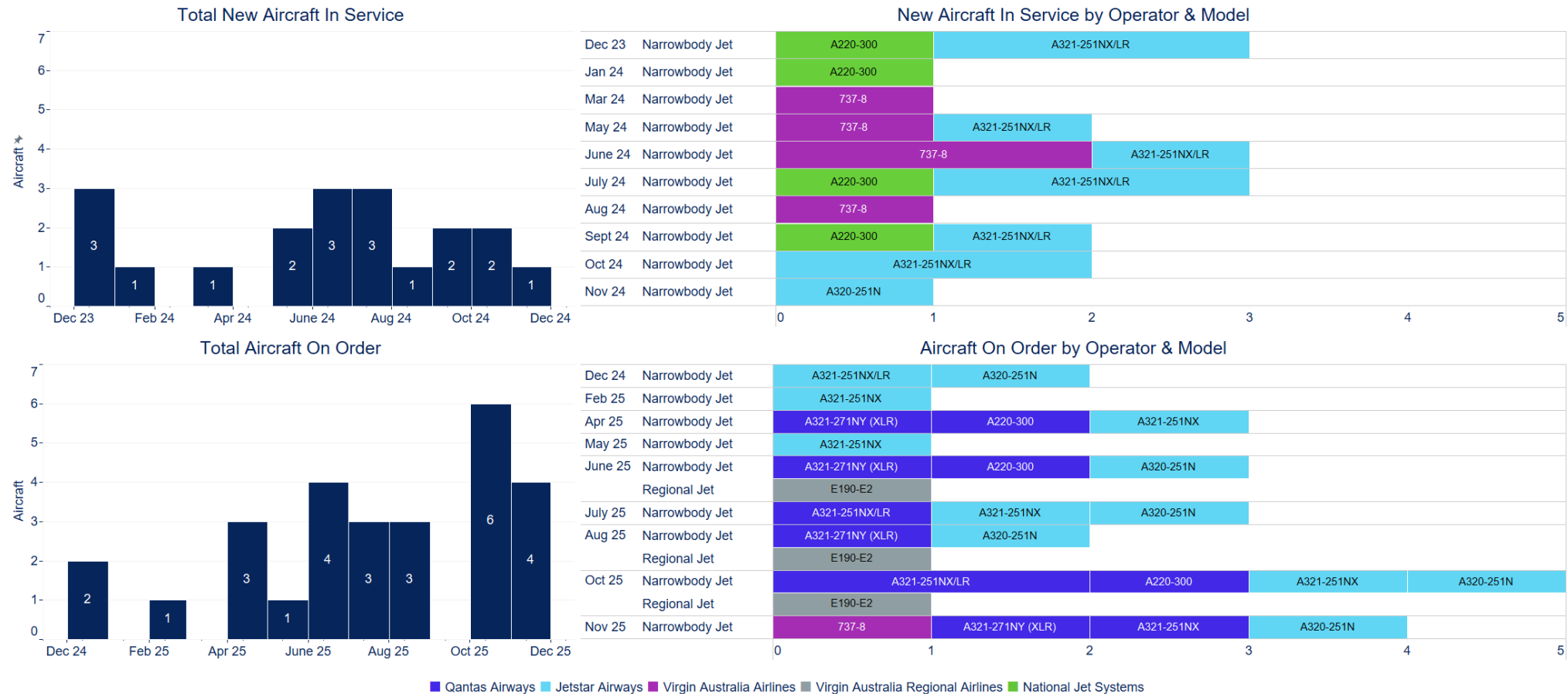


Source: Airservices ODAS (includes airline flights only).
For multi-leg flights, legs that start and end outside Australian airspace are not included.

Australian fleet

A new A320neo aircraft entered service in November which is expected to boost capacity for low-fare seats on domestic routes. However, the global airline industry continues to face significant challenges due to delays in aircraft deliveries and maintenance-related issues, projected to persist until early 2026. In navigating these constraints, airlines are leveraging partnerships and wet lease arrangements to meet increasing passenger demand.

Figure 15. New aircraft that entered service in the past 12 months and those scheduled for delivery in the upcoming 12 months.



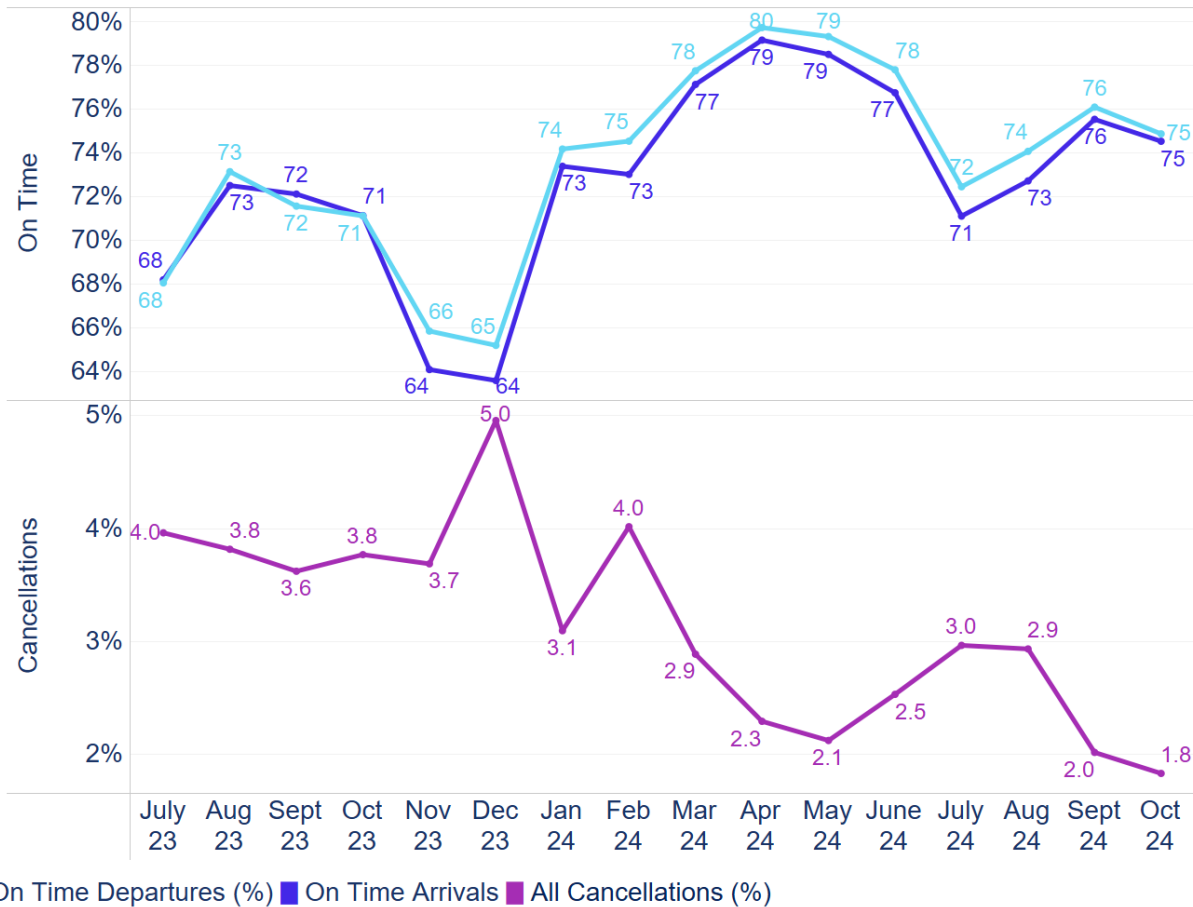
Source: Centre for Aviation Fleet (CAPA) data, as of 3 December 2024.

Australian aviation network performance

On-Time Performance (OTP) in the previous month

In October 2024, the cancellation rate dropped to 1.8%, the lowest it has been since 2021 and about half the rate of the same time last year. This improvement demonstrates a strong focus across the industry on maximising flight completion rate for more reliable passenger journeys. Overall OTP has stabilised around 75%, but still below international benchmarks.

Figure 16. Total industry OTP and cancellations (data available up to 31 October 2024 based on latest BITRE data release).



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

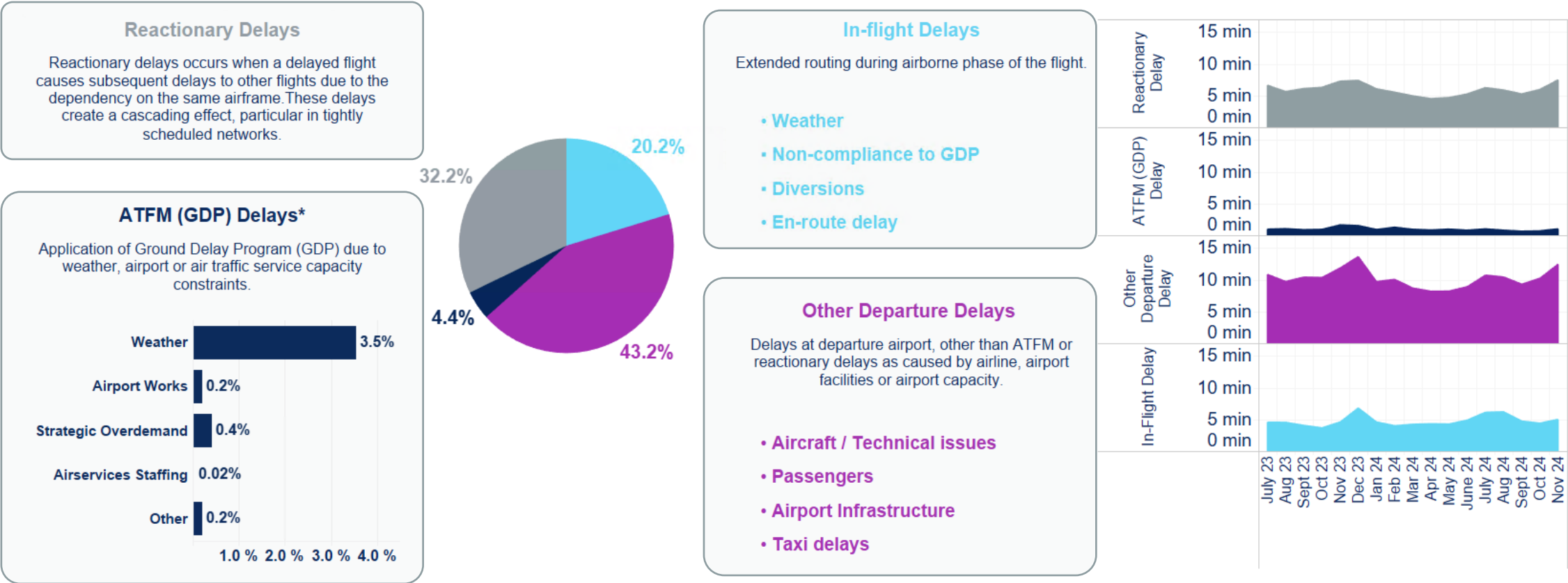
Figure 17. Arrival OTP for top ten performing airlines by region (October 2024) in comparison to Australia's industry OTP.

Region	On-Time Arrivals	against Oct 2023
Asia-Pacific	81%	— 0%
North America	84%	▲ 4%
Europe	81%	▼ 2%
Latin America	83%	▲ 2%
Middle East & Africa	84%	▼ 1%
Australia	75%	▲ 4%

Lead indicators of OTP

As lead indicator of OTP, all key components of network delays deteriorated in November 2024, primarily driven by unstable weather leading into summer. Reactionary and other departure delays constituted over 75% of network delays across the four major airports.

Figure 18. Breakdown of delay components for major Australian airports, as a percentage of total delays for November 2024 (left) and average values per flight (right).



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.

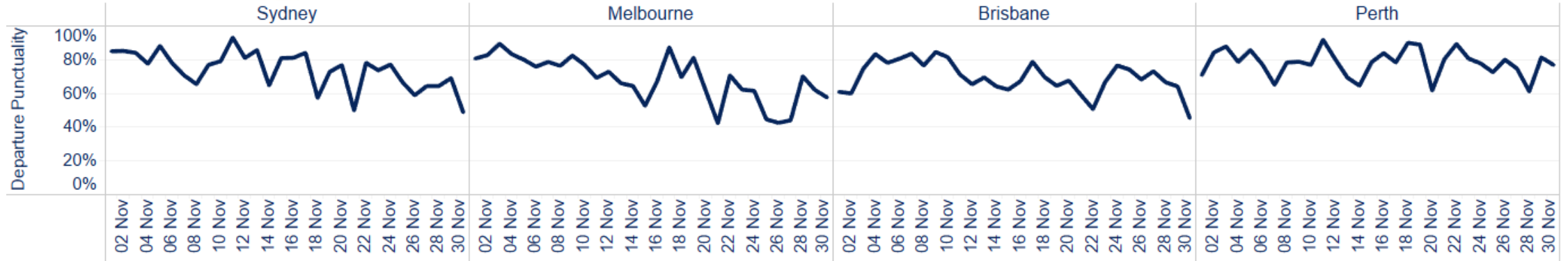
* The ATFM system allows airlines to change GDP slots and adjust delays compared to their original allocation.

First wave performance

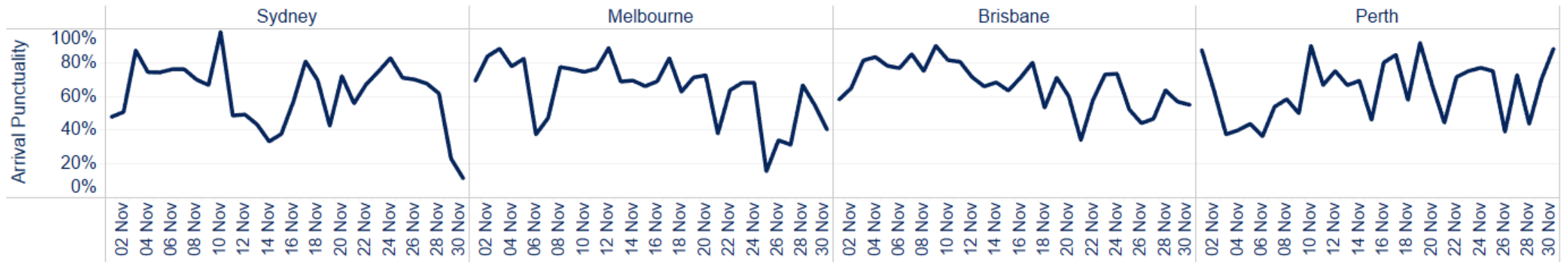
As weather disruptions intensified on the East Coast in the second half of November, there was a corresponding deterioration in the first wave performance (i.e. punctuality for first arrivals and departures of the day). This is most evident at Melbourne on 25, 26, 27 November, and Sydney on 30 November.

Figure 19. First wave punctuality for major Australian airports throughout the month (November 2024).

Departure Punctuality (First flight out)



Arrival Punctuality (First flight in)

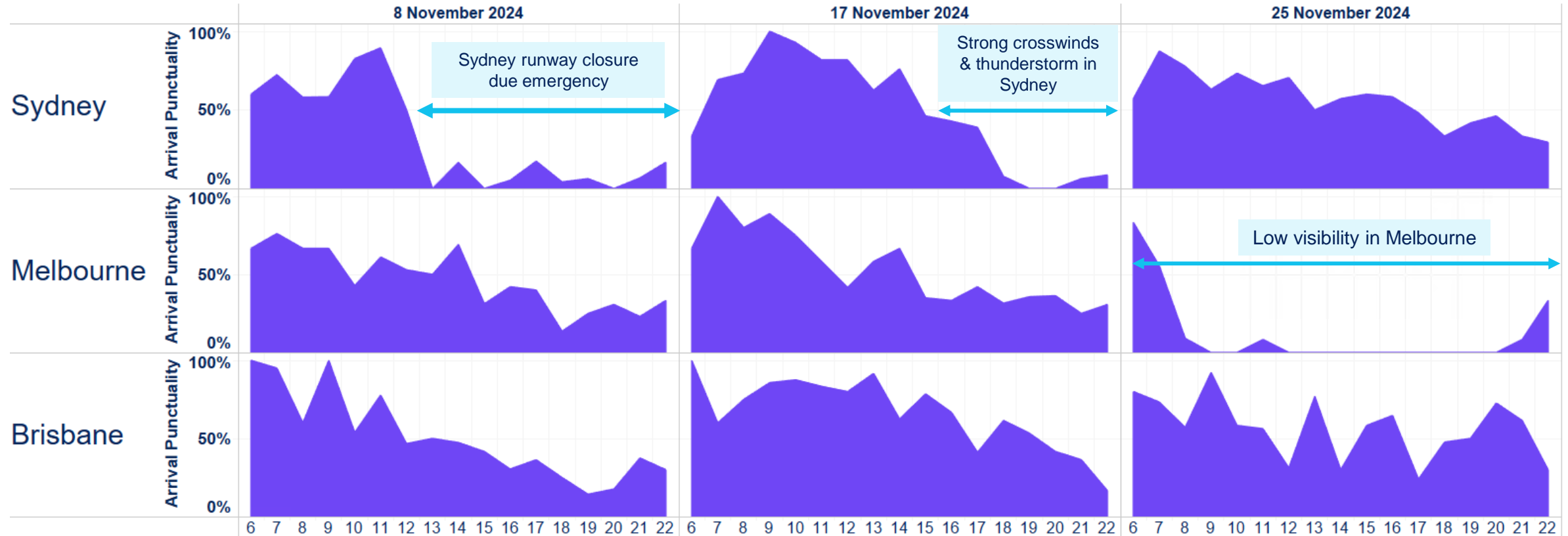


Source: Airservices ODAS. The data presented is an estimate based on domestic flight data available to Airservices, where departure and arrival punctuality and delays are based on take-off and landing times against initial times of the ATFM process.

Network resilience

The impact of unplanned events such as runway closures due to aircraft emergency or extreme weather at the major airports can quickly propagate across the entire network. When load factors are high, the ability to mitigate the delay impact can be limited. This is illustrated by three examples in November with rapid deterioration in OTP following unanticipated disruptions. To enhance preparedness and resilience, a senior-level daily network meeting has been introduced over the holiday period to align risk assessment, coordinate joint responses and increase trust in network decisions.

Figure 20. Evolution of delays throughout the day for major East Coast airports (SYD, MEL, BNE) for examples of major disruptive events.



Source: Airservices ODAS. The data presented is an estimate based on domestic flight data available to Airservices, where departure and arrival punctuality and delays are based on take-off and landing times against initial times of the ATFM process.

Air Traffic Flow Management (ATFM)

In November 2024, Air Traffic Flow Management delays were higher than the previous three months due to weather disruptions at all major airports. Sydney was most impacted with low visibility, storms and crosswind conditions. While these challenges are typical this time of the year, the use of Digital Twin technology and an ongoing focus on optimising demand/capacity balance has resulted in a significant reduction in the application of Ground Delay Programs and airborne delays compared to the same period last year.

<0.1%

Flights Impacted
% impacted by Airservices capacity constraints across all flights

<0.1%

Total Network Delays
% attributable to Airservices, out of all network delays

0.4%

ATFM Delays
% attributable to Airservices (total ATFM delays are 4.4% of all network delays)

0%

Arrival Cancellations
% attributable to Airservices

Figure 21. GDP application hours, airborne delay, and compliance.

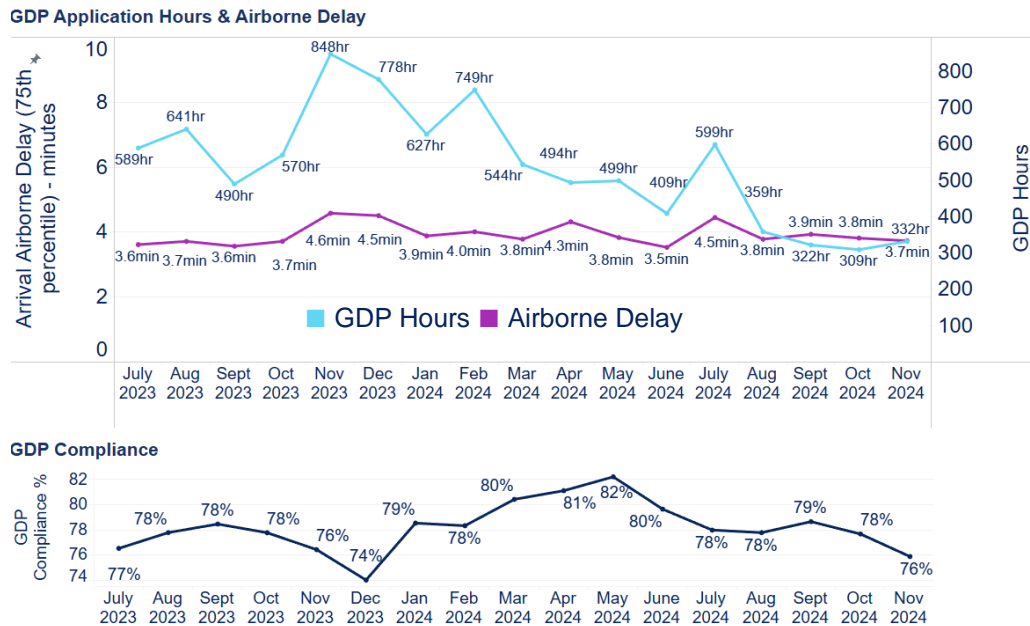
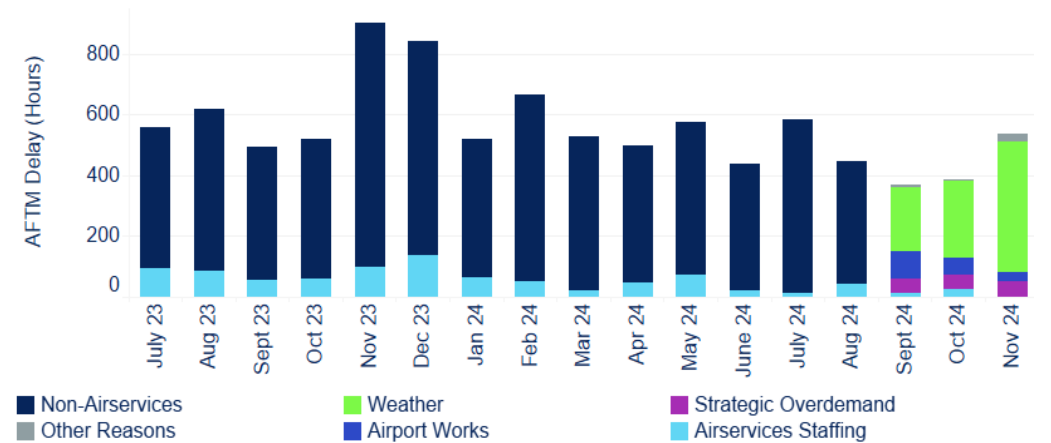
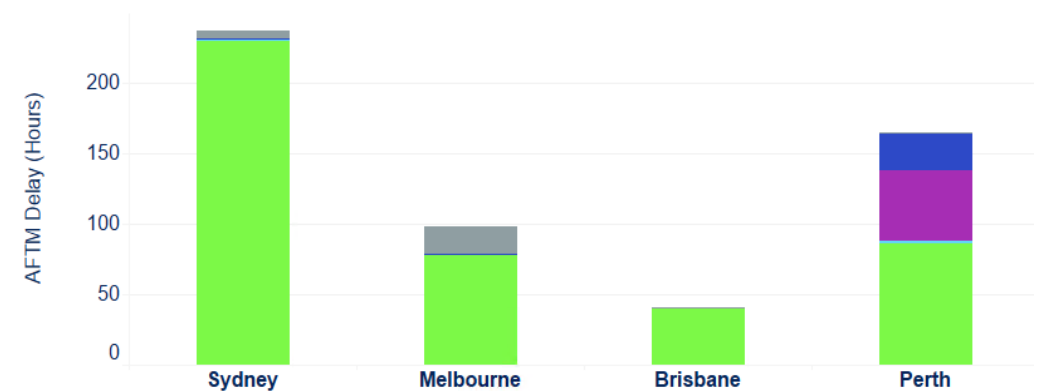


Figure 22. ATFM (GDP) delay by attribution per month (top) and for November 2024 (bottom).



ATFM (GDP) causes in November 2024

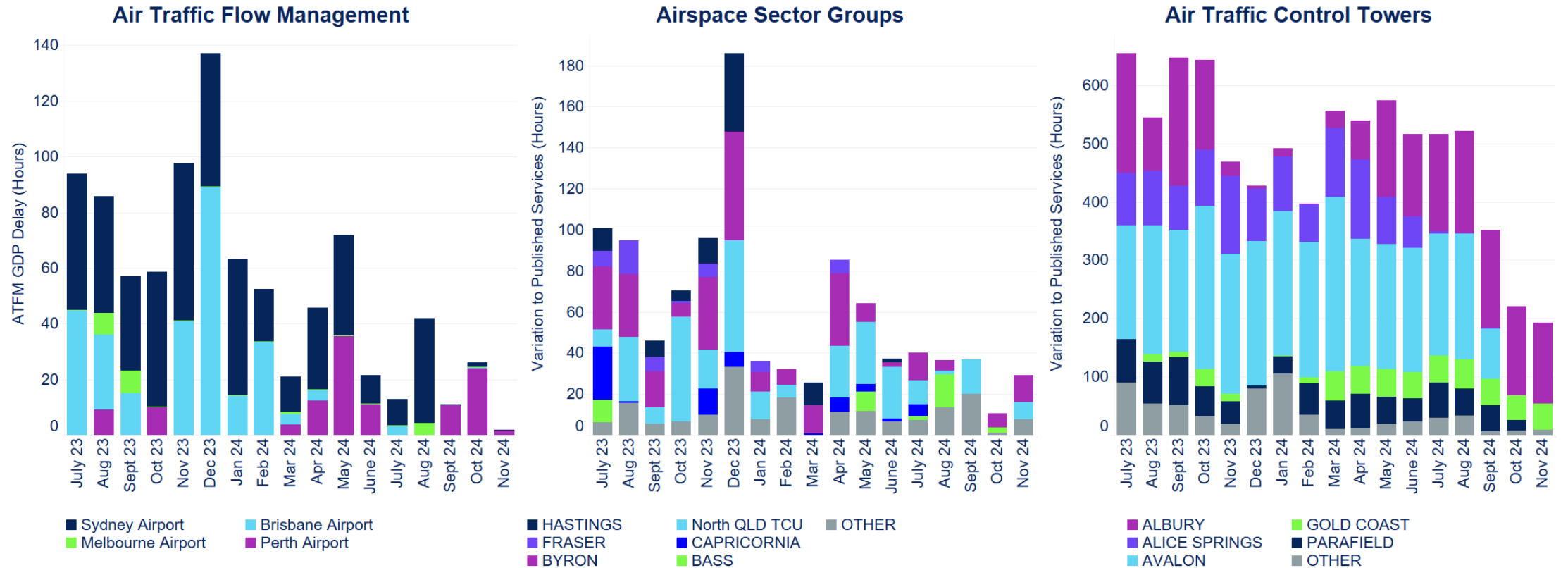


Source: Airservices ODAS. A GDP is an agreed industry plan to balance the demand (based on airline schedules) to the available runway capacity that is collaboratively agreed (refer to [GDP Fact Sheet](#)). GDP compliance represents the proportion of flights into an airport that departed compliant with their assigned GDP slot. Cancellations only include arrivals with a flight plan.

Air Traffic Service Provision

Air traffic service performance is continuing to improve, with November seeing the lowest Airservices attribution to ground delays and service variations since commencing reporting on these metrics in 2022. To ensure we are prepared for the summer holiday period, additional layers of resilience are being built into rosters with standby arrangement in key locations, and operational coordination with stakeholders has been strengthened for a no-surprise approach to optimise network decisions

Figure 23. Airservices attributable hours of ATFM GDP delay (left) and variation from published levels across Airspace Groups (middle) and ATC Towers (right).



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.

For more information:
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