airservices australia

Australian Aviation Network Overview

December 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

As 2024 came to a close, we saw a number of positive developments for the Australian aviation sector. Consumer confidence, inflation and regional trade are continuing to improve. This Christmas holiday period recorded the strongest growth in international travel over the past five years, benefitting from tourism and capacity increase on international routes. This growth was nevertheless offset by a contraction in domestic demand reflecting the cyclical trend in business travel and general aviation.

Operational reliability was a key priority for our industry and we saw improved on-time performance (OTP) each month in 2024 when assessed against the same period in 2023. However, the deterioration in OTP in November 2024 reflects persistent challenges in balancing resilience with operational efficiency.

Further measures to strengthen whole-of-network planning were implemented to ensure a successful Christmas holiday period. Daily network oversight meetings with senior industry leaders have been in place to jointly assess risk scenarios and develop disruption response plans for the following day of operations. As a result, December 2024 recorded the lowest level of Ground Delay Program (GDP) applications since reporting began, at around 10% of December 2023 levels, while airborne delays remained stable. This is the result of improved governance around implementing GDPs, along with more favourable weather conditions and ease in business-related demand over December.

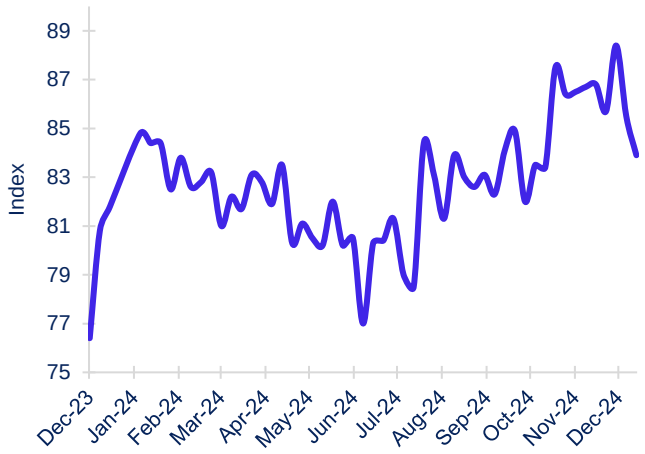
Additional air traffic service resilience measures were put in place in preparation for the summer holiday period, including changing overtime rostering practices, minimising training and maintenance activities and having additional staff on call in key locations. Delays attributed to Airservices' remained a small proportion of total delays (0.1%), without affecting peak passenger demand periods. There were only three enroute airspace service variation events in December. Unplanned service variations at towers were minimised, and most regional towers have returned to published hours of coverage.

Economic and social trends

Economic factors

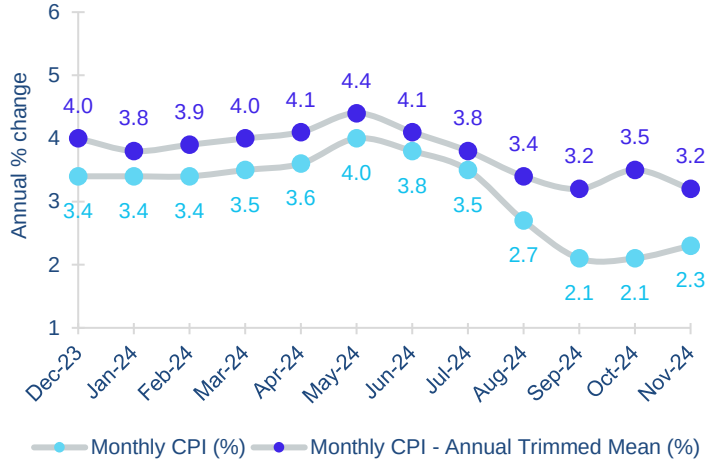
Economic drivers including consumer confidence, inflation and regional trade are underpinning growth in Australia's aviation industry. However, the weakened Australian dollar, geopolitical tensions and elevated airfares highlight ongoing volatility.

Figure 1. Roy Morgan Consumer Confidence Index.



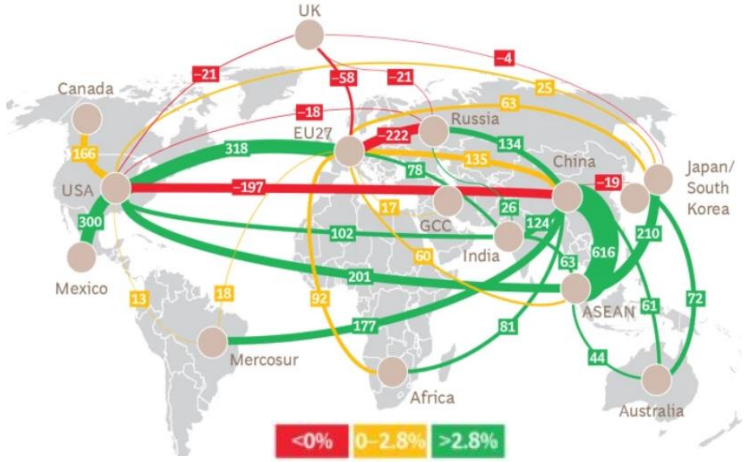
Source: Roy Morgan (website) – as at 7/1/2025

Figure 2. Consumer Price Index (CPI) Indicator.



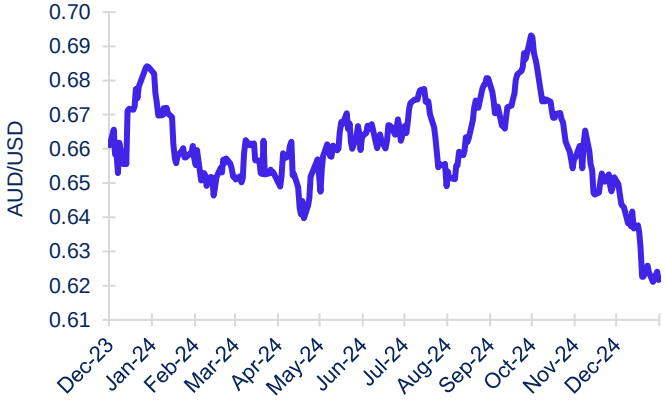
Source: ABS (website) – as at 8/1/2015

Figure 3. Change in trade of goods, major corridors (line colours represent 2022-2032 CAGR%).



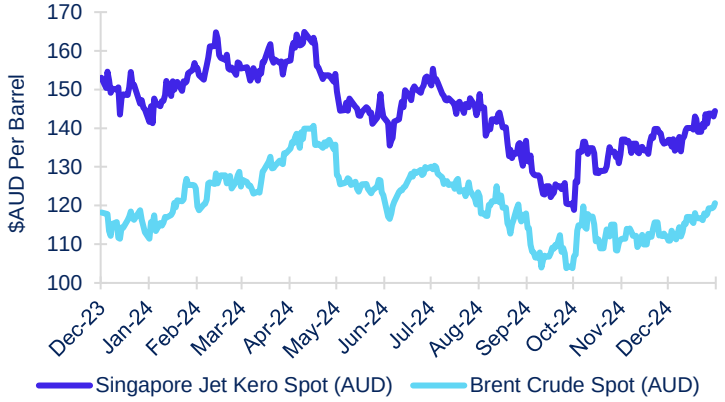
Source: BCG (website) – as at 8/1/2025

Figure 4. AUD/USD Exchange Rate.



Source: Reserve Bank of Australia (website) – as at 7/1/2025

Figure 5. Jet fuel and Brent crude oil prices.



Source: Bloomberg – as at 8/1/2025

Figure 6. Domestic airfares (best discount).

Source: BITRE (website) – as at 7/1/2025

Social factors

Whilst there has been a downward trend in the number of aircraft noise complainants, the increase in complaints per complainant during December reflects heightened sensitivity to aviation's social impact. Initiatives to provide relief to affected local communities included increased use of Simultaneous Opposite Direction Parallel Runway Operations (SODPROPS) from 28 November 2024 in Brisbane.

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

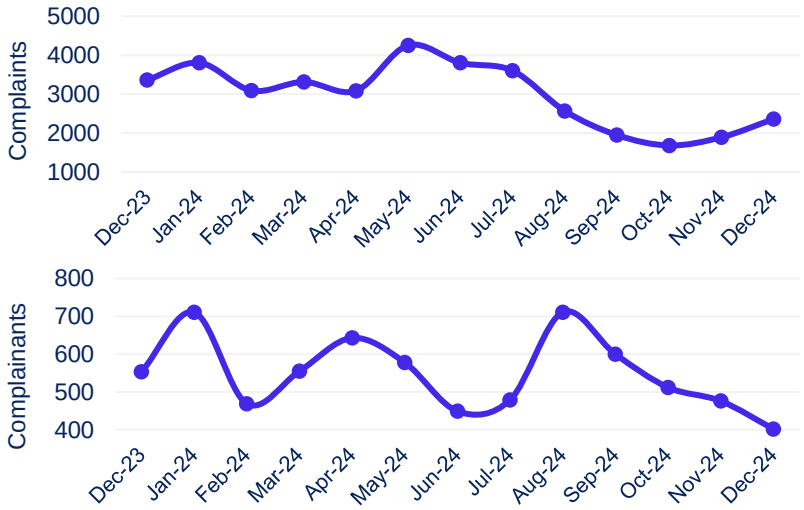


Figure 9. CO2 emissions savings from optimised User Preferred Routes (UPR) across oceanic and cross-continental airspace per month.

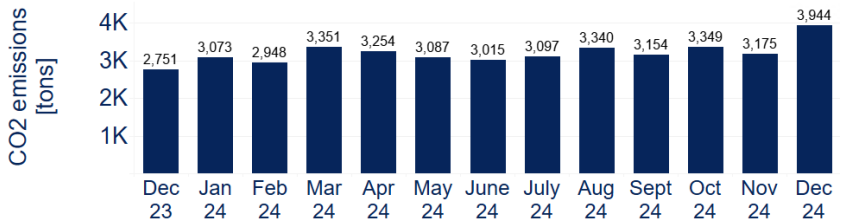
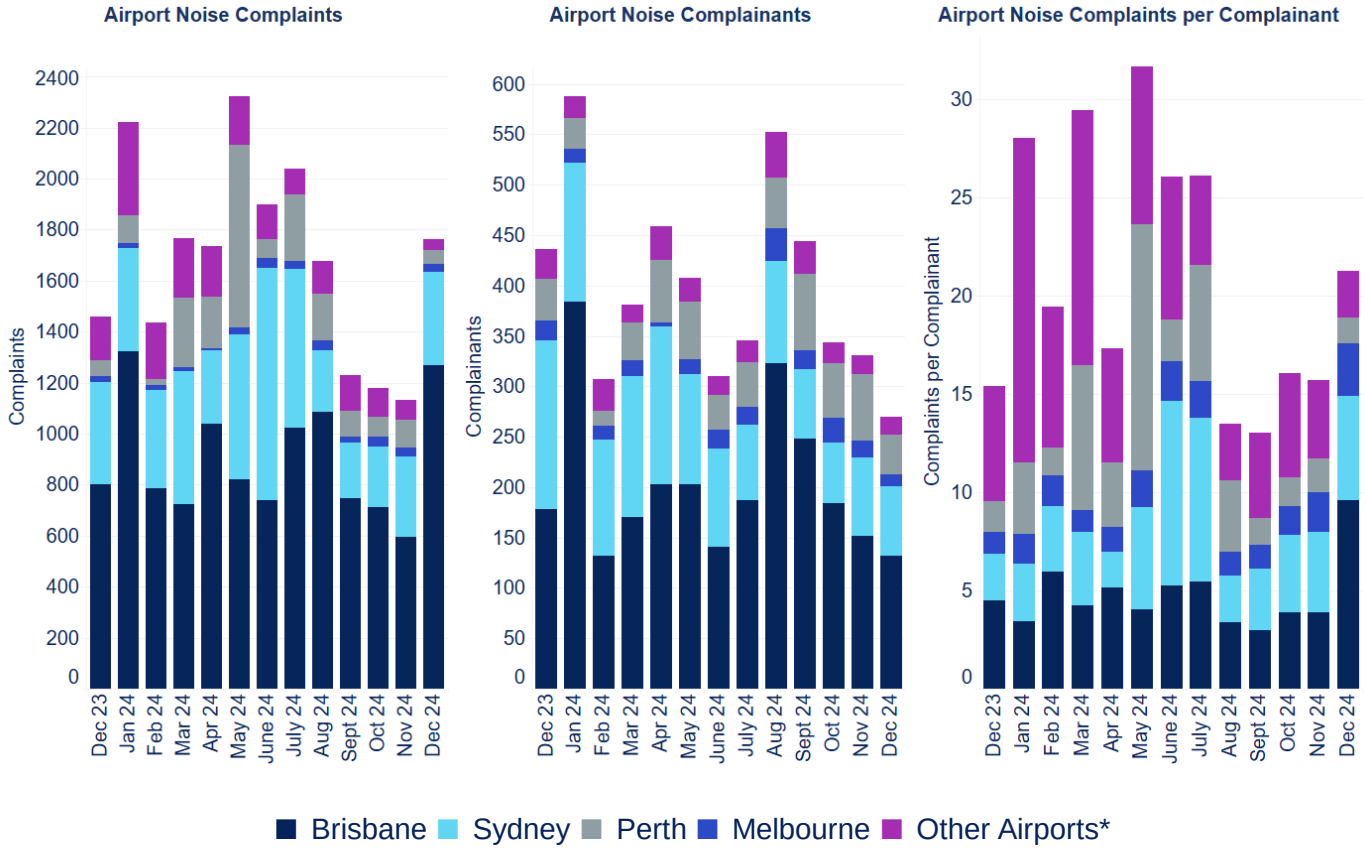


Figure 8. Airport aircraft noise complaints, complainants, and complaints by complainant per month.



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 December, the Australian aviation network recorded a 4% contraction in daily flights compared to the previous month due to a reduction in domestic business travel and general aviation. International flights increased by 11% month-on-month, in line with expectations for increased seasonal demand.

Average Daily Flights
(December 2024 and Year-On-Year Growth)

3,633

-1%

Total Domestic Flights
(December 2024 and Year-On-Year Growth)

91,547

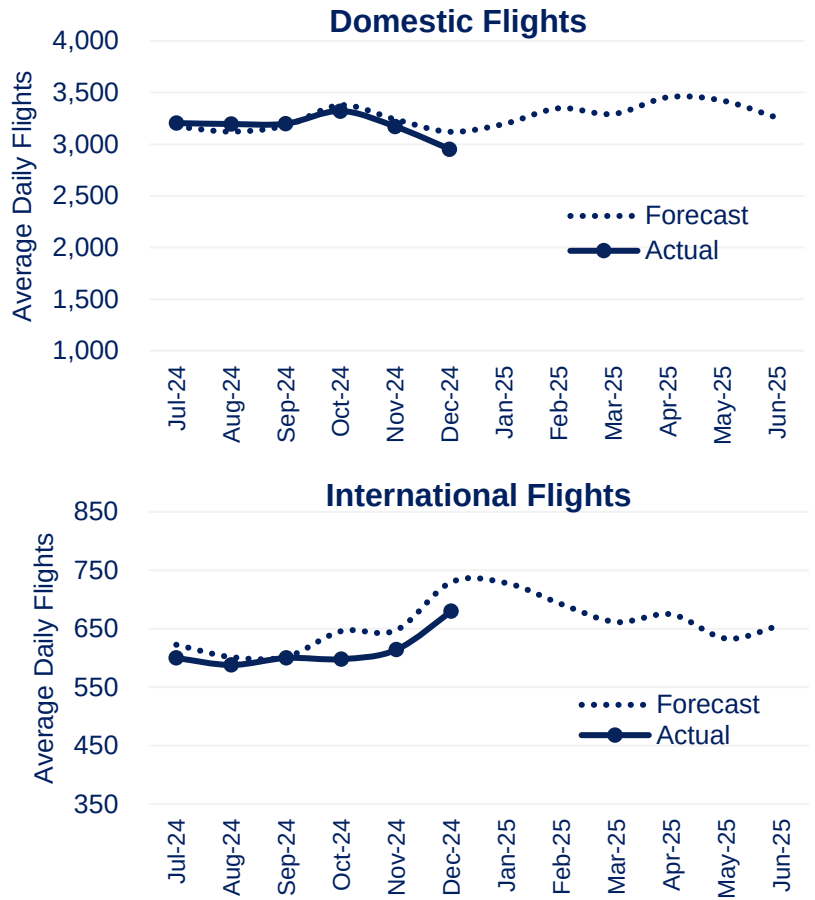
-2%

Total International Flights
(December 2024 and Year-On-Year Growth)

21,076

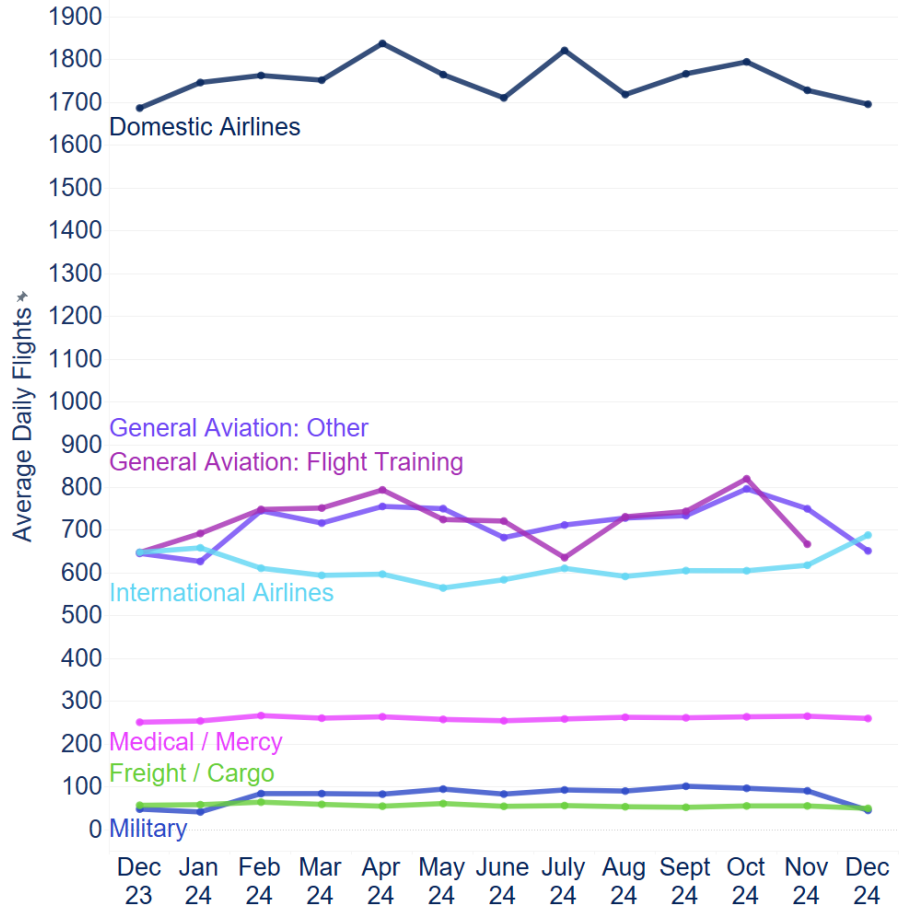
+5%

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

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

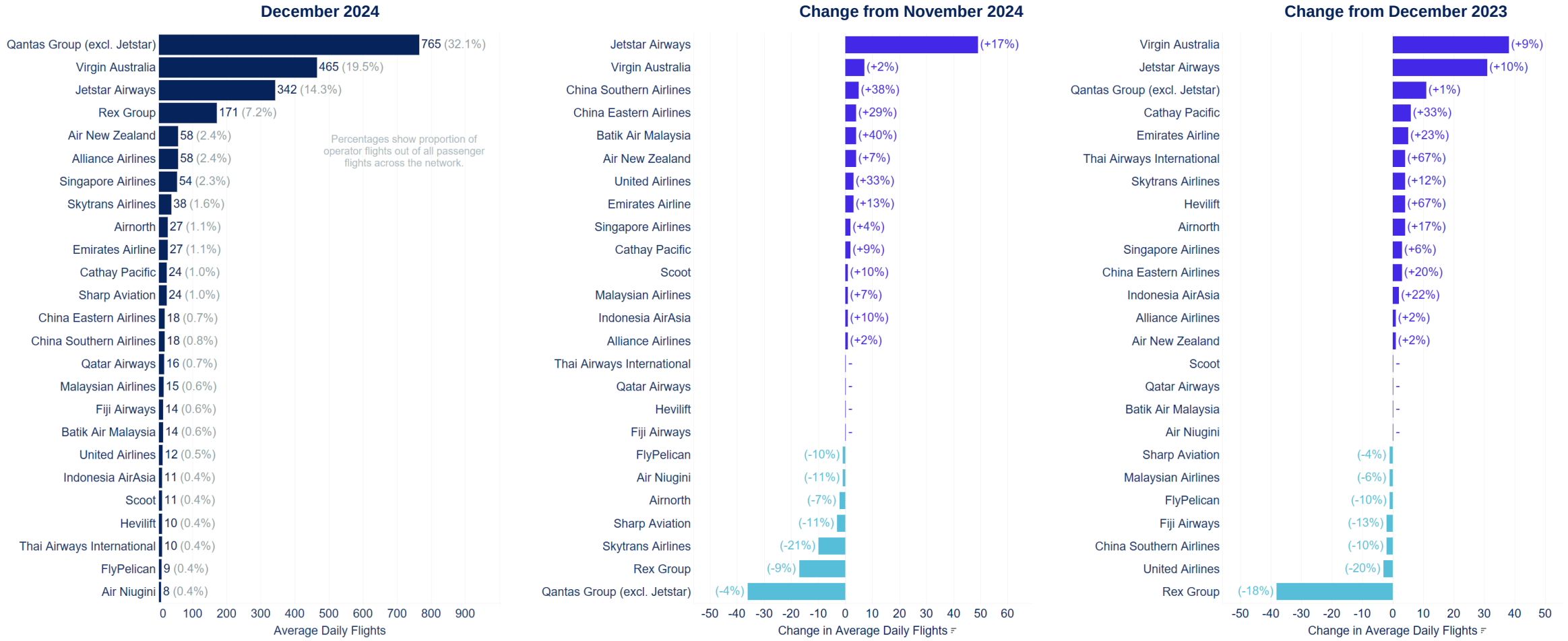


Source: Airservices ODAS (excludes helicopters).
Data for 'General Aviation: Flight Training' is one month in arrears.

Top aircraft operators

Recent growth in the Australian aviation network has been driven by Jetstar's trans-Tasman expansions and capacity increase from airlines from China, United States and Malaysia.

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

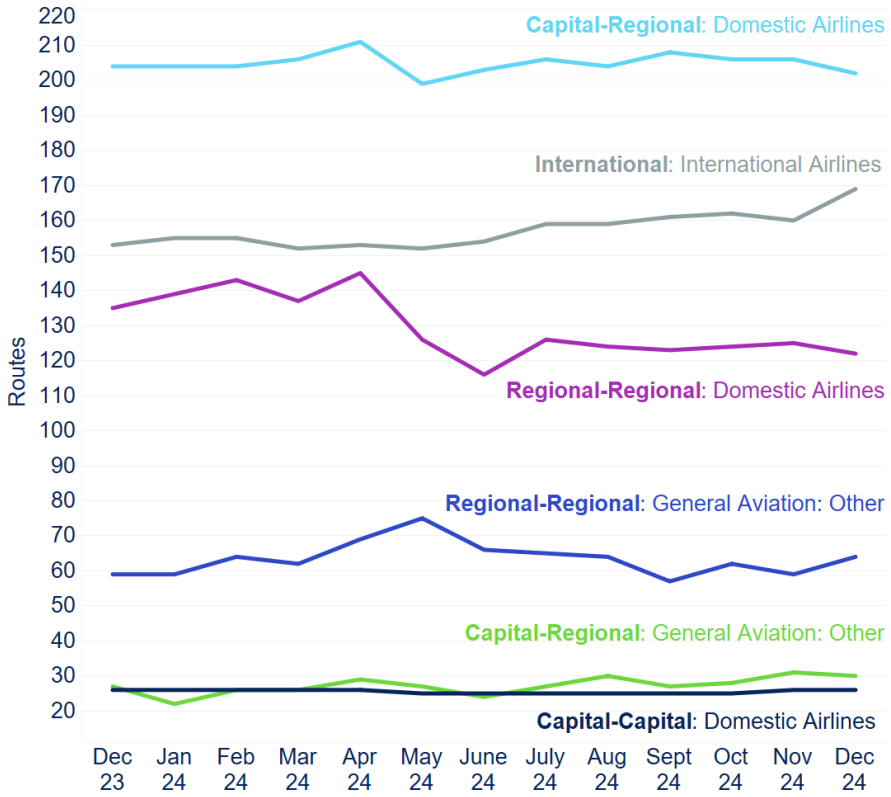


Source: Airservices ODAS (includes airline flights only).

Network trend

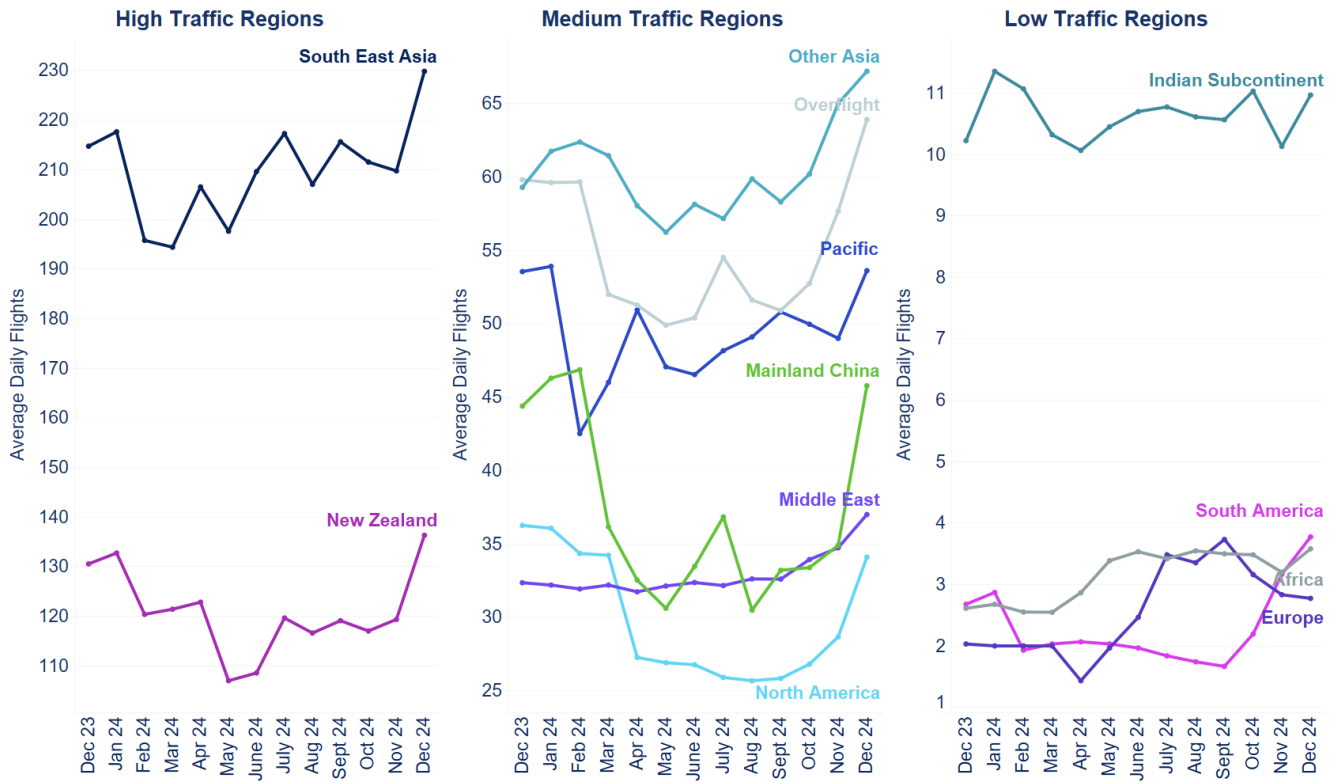
All international markets, with the exception of Europe, recorded strong growth recently. Comparing the December month in 2024 versus 2023, 16 direct international routes have been added, mainly to South-East Asia and China. In contrast, domestic network connectivity has stabilised.

Figure 13. Network connectivity by unique routes per month.



Source: Airservices ODAS (excludes military, medical/mercy, training, return, and over flights).
Only routes with at least one operator with at least 2 flights weekly are included.

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

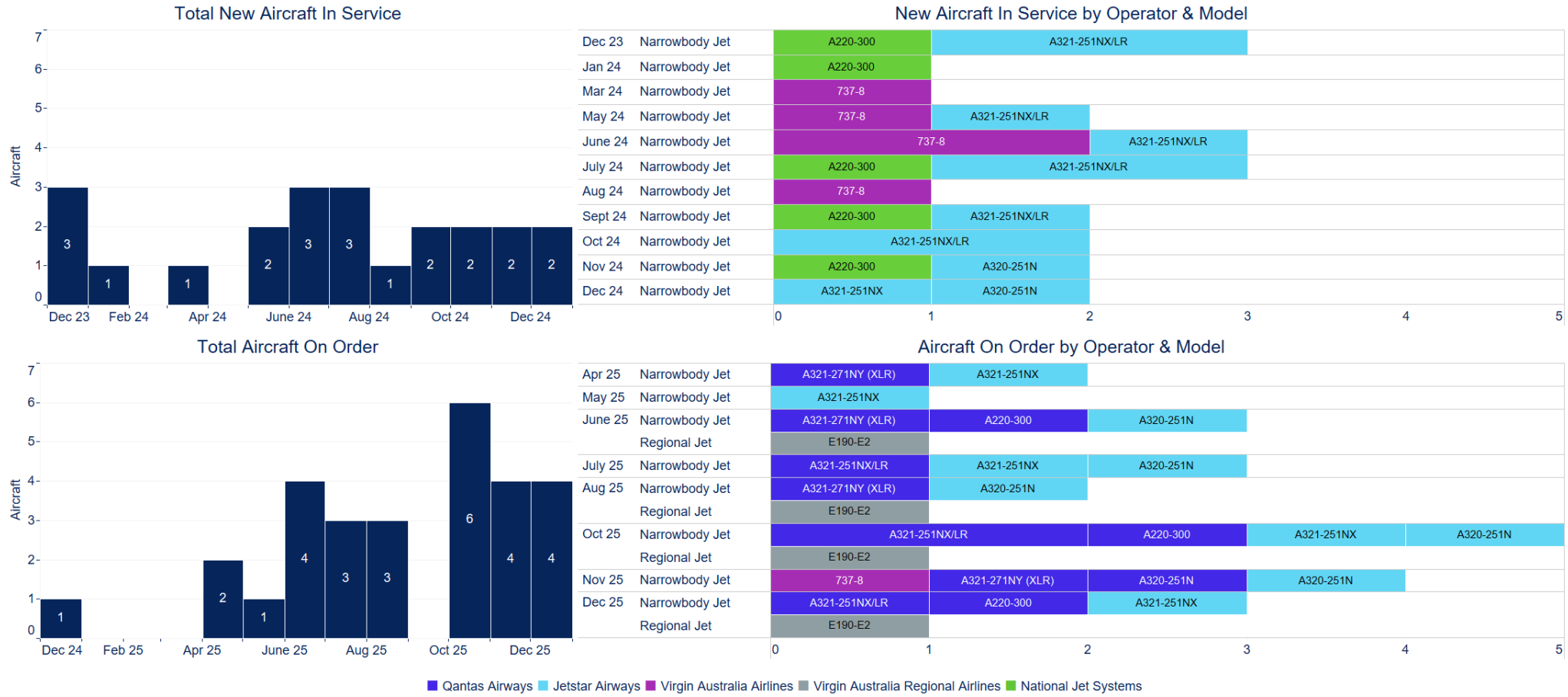


Source: Airservices ODAS (includes airline flights only).
For multi-leg flights, legs that start and end outside Australian airspace are not included.

Australian fleet

There is a steady rate of fleet renewal in Australia, driving improvements in operational performance and enabling network expansion. In December, two new narrowbody jets entered service. Regional aviation is also set to benefit from investments in E190 and Q400 aircraft, supporting growth in wet lease arrangements.

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



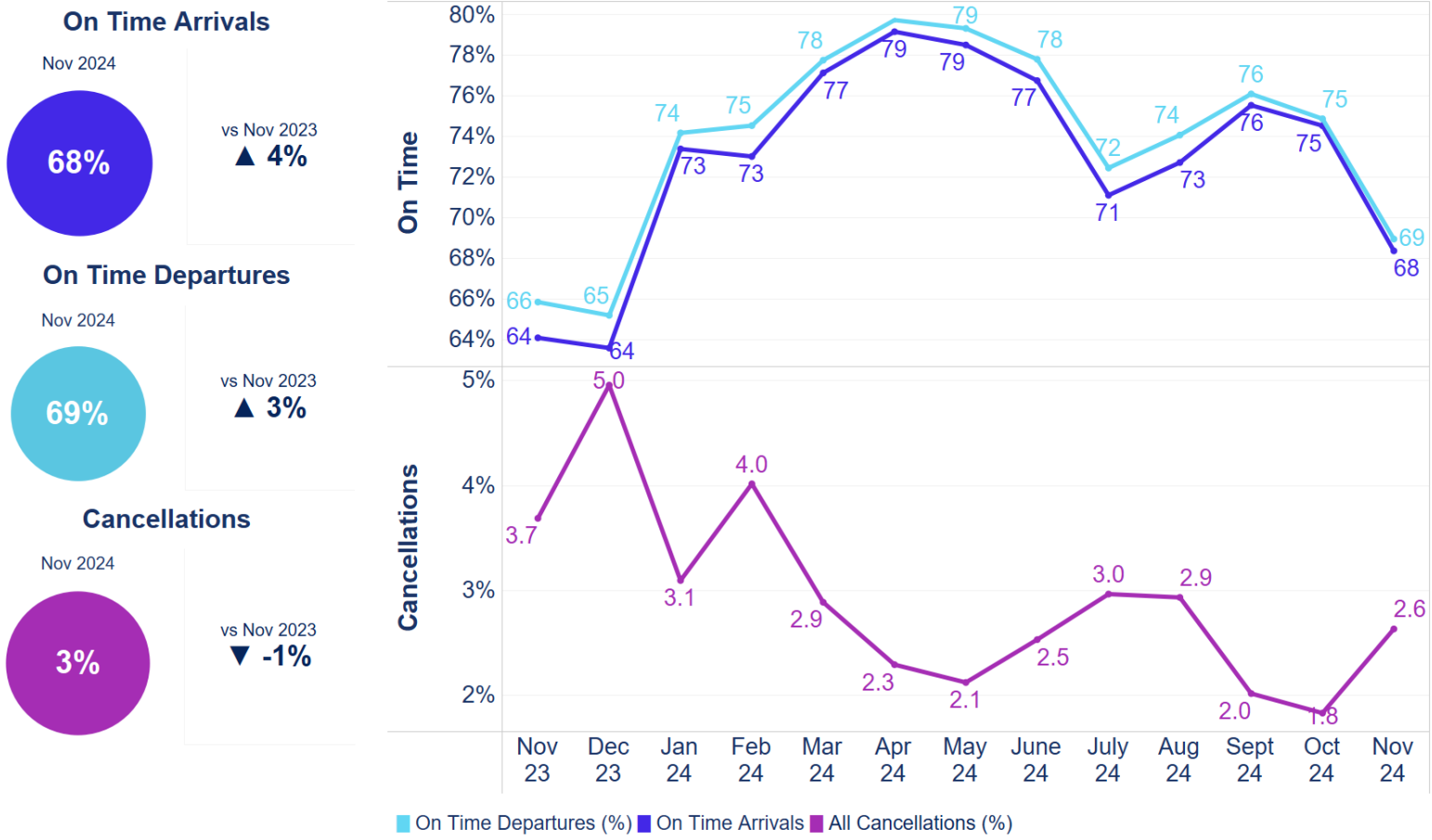
Source: Centre for Aviation Fleet (CAPA) data, as of 8 January 2025. This includes new build aircraft only – acquisition/lease of second-hand aircraft are not shown.

Australian aviation network performance

On-Time Performance (OTP) in the previous month

Our industry recorded higher punctuality each month in 2024 when assessed against the same period in 2023, but still tracking below international trend. The deterioration in OTP in November 2024 due to disruptions, such as runway closures after aircraft emergency or extreme weather at major airports, reflect persistent challenges in balancing resilience with operational efficiency. Strengthening disruption handling capabilities and adapting schedules and aircraft utilisation to improve reliability remains an industry priority.

Figure 16. Total industry OTP and cancellations (data available up to 30 November 2024 based on latest BITRE data release).



Source: BITRE for Australian data (website)

Figure 17. Global arrival OTP and cancellations rates in comparison to Australia (November 2024). Includes all major airlines in each region.

Region	OTP	Cancel-lations
Europe	80%	0.9%
Northeast Asia	82%	1.0%
South & Southeast Asia	74%	0.3%
Middle East	84%	0.3%
North America	84%	0.6%
Latin America	78%	1.8%
Africa	76%	0.3%
New Zealand & Fiji	73%	2.8%
Australia*	**68%**	**2.6%**

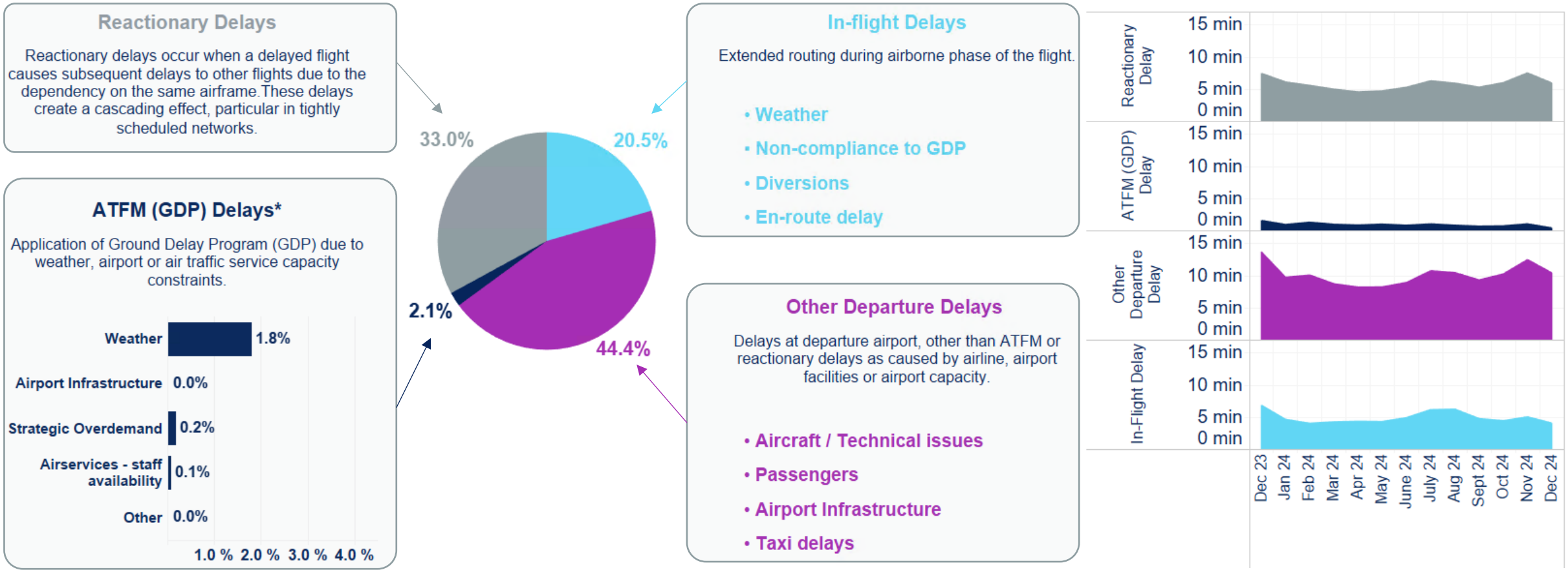
* Data for Australia includes domestic flights only.

Source: OAG (website)

Lead indicators of OTP

All key components of network delays in December 2024 improved compared to the previous month. Reactionary and other departure delays constituted over 75% of network delays across Sydney, Melbourne, Brisbane and Perth. Airservices is seeking to refine the delay estimation method and identify complementary data to better understand causal factors.

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

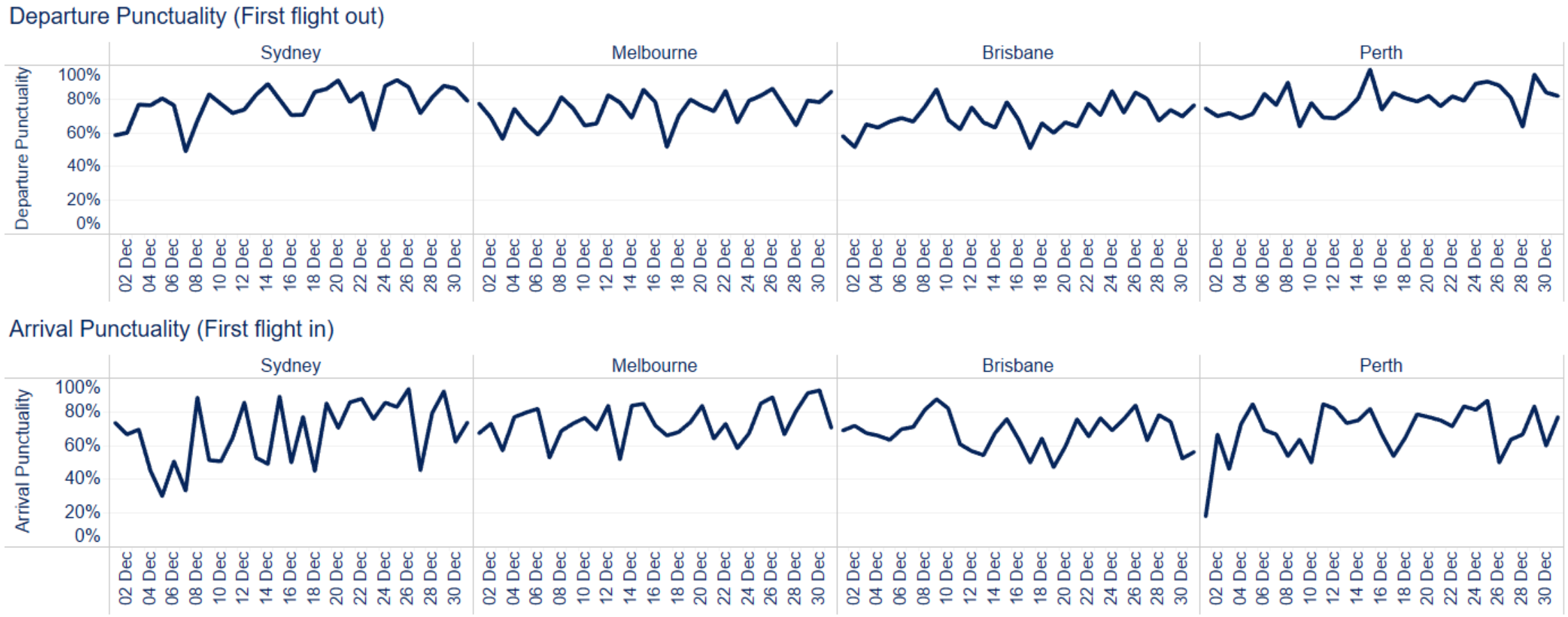


Source: Airservices ODAS (includes airline flights only).
The delay presented is an estimate based on domestic flight data available to Airservices.
*The ATFM system allows airlines to change GDP slots and adjust delays compared to their original allocation.

First wave performance

First wave punctuality remains paramount to reduce reactionary delays and maximise on-time performance throughout the day. In December, departure punctuality improved towards the key Christmas holiday period.

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



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)

December 2024 recorded the lowest level of Ground Delay Program (GDP) applications since reporting began, with no GDP at Melbourne. From 1 December, daily calls with senior industry leaders have been implemented to jointly assess risk scenarios and develop disruption response plans for the following day of operations. Meanwhile airborne delays remained stable, reflecting improved governance around implementing GDPs, along with more favourable weather conditions and ease in business-related demand over December.

0.2%
Flights Impacted
by Airservices capacity constraints

0.1%
Total Network Delays
attributable to Airservices, out of all network delays

3.8%
ATFM (GDP) Delays
attributable to Airservices (total ATFM delays are 2.1% of all network delays)

0.6%
Arrival Cancellations
attributable to Airservices

Figure 20. GDP application hours, airborne delay, and compliance.

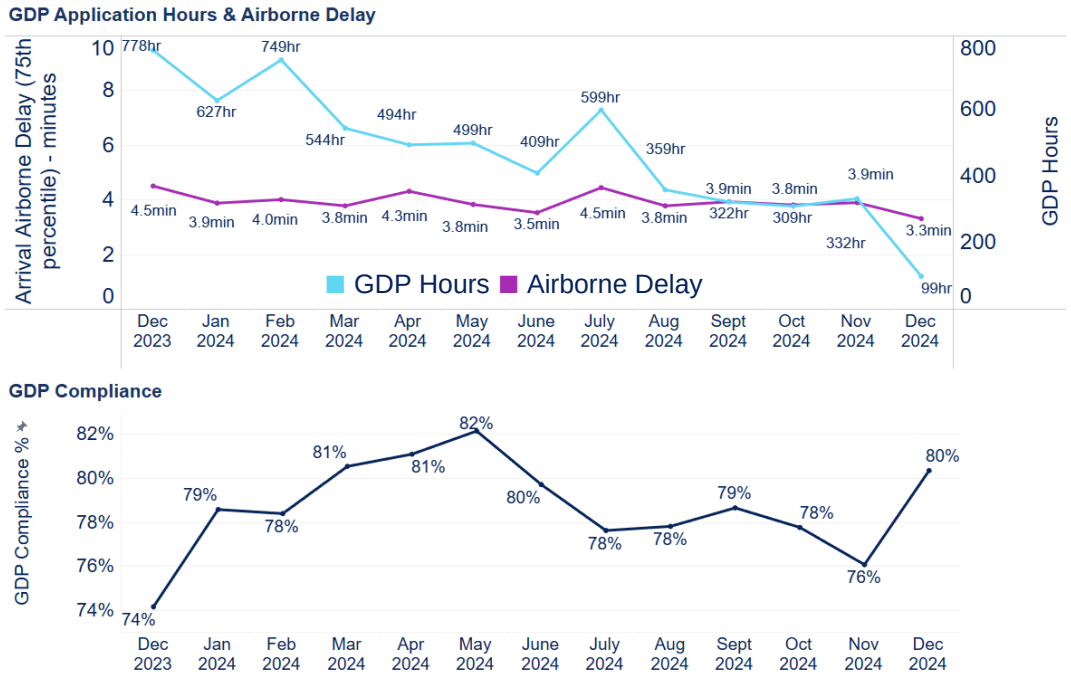
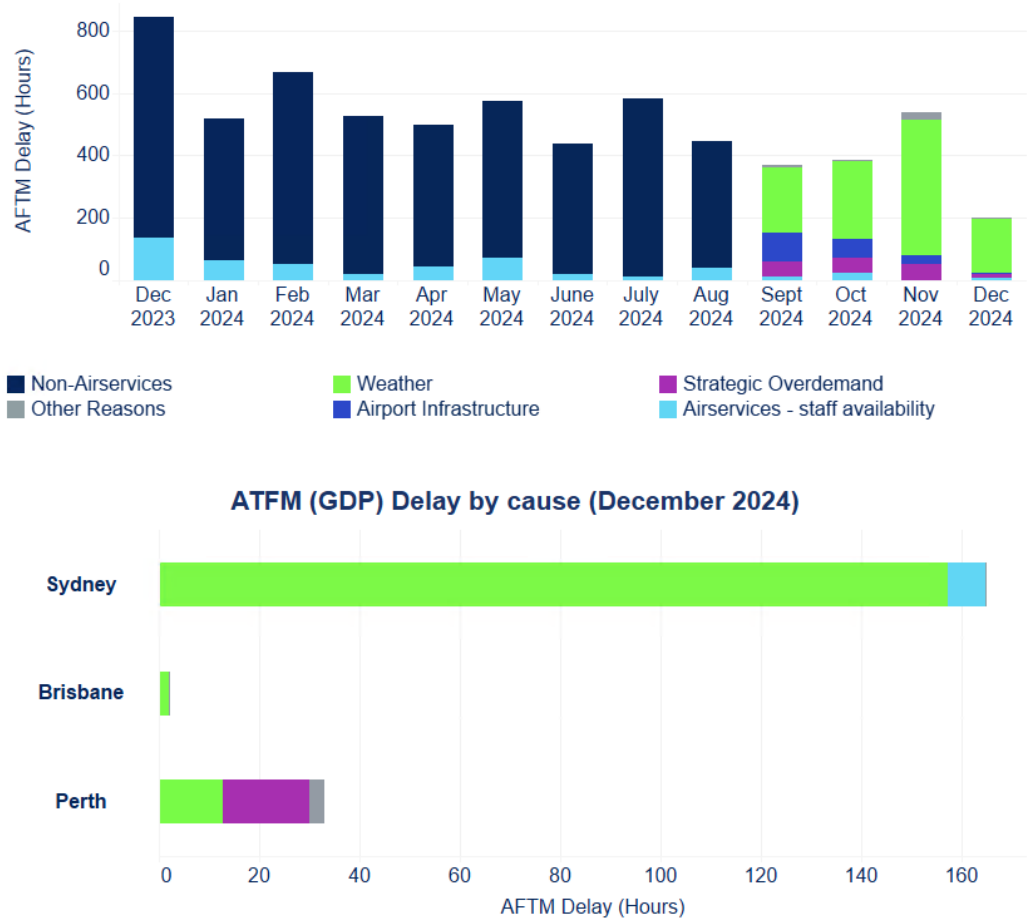


Figure 21. ATFM (GDP) delay by attribution per month (top) and for December 2024 (bottom).

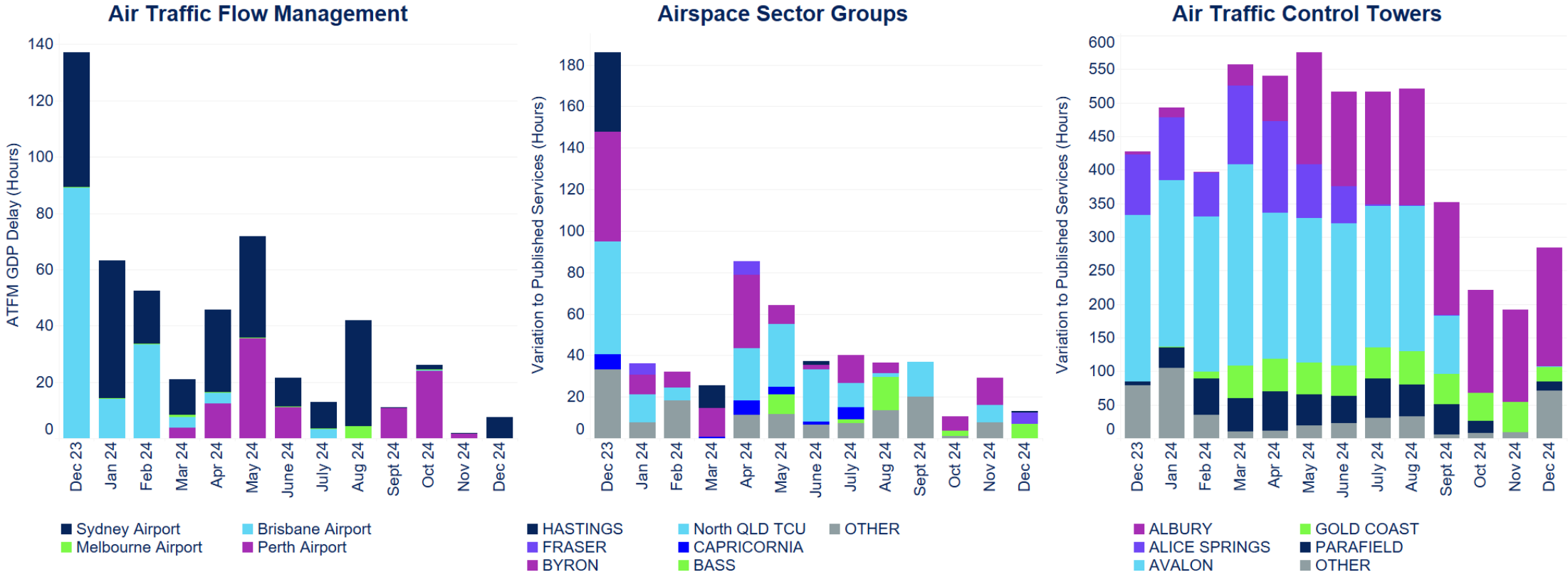


Source: Airservices ODAS. A GDP is an agreed industry plan to balance the demand (based on airline schedules) to the available runway capacity that is collaboratively agreed (refer to GDP Fact Sheet). GDP compliance represents the proportion of flights into an airport that departed compliant with their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

Air Traffic Service Provision

Following additional resilience measures in preparation for the summer holiday period, there were only three enroute airspace service variation events in December 2024. Delays attributed to Airservices' remained a small proportion of total delays (0.1%), without affecting peak passenger demand periods. Unplanned service variations at towers were minimised, and Gold Coast Tower returned to published hours of coverage.

Figure 22. Airservices attributable hours of ATFM GDP delay (left) and variation from published levels across Airspace Groups (centre) and ATC Towers (right).



On Christmas day, all Secondary Capital Aerodromes remained closed as approved by CASA.

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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