



# Australian Aviation Network Overview

January 2025





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

The Australian aviation network began 2025 with strong growth in international travel. January saw a 7% year-on-year growth in international traffic driven by leisure demand during the school holidays, Australian Open and the Lunar New Year celebrations. January 11 and 12 marked the busiest days for international traffic at Sydney and Melbourne respectively in the last five years.

Overall network reliability has improved in terms of on-time performance and first wave punctuality, following collective industry efforts. Key influencing factors include refining aircraft turnaround management, optimising flight schedules, and enhancing collaborative decision-making across airlines, airports and Airservices for weather and disruption management.

The application of the Ground Delay Program (GDP) remained minimal, with no GDP at Melbourne and Brisbane in January 2025. This reflects the positive impact of the preparation, planning and enhanced governance measures in balancing network capacity and demand without adversely impacting airborne delays, as well as reduced demand during the January school holiday period.

The momentum of month-on-month improvement in air traffic services continues. In January 2025, there were no Airservices attributable GDP delays, only two enroute airspace service variations and one unplanned tower service variation at Parafield, which was closely coordinated with local operators to minimise impact. Ensuring service consistency, including at regional airports that cater for general aviation, remains a priority. We are actively engaging with general aviation operators to better understand their ongoing needs and adjust our recruitment, training and rostering approaches to enable this important sector of our industry.

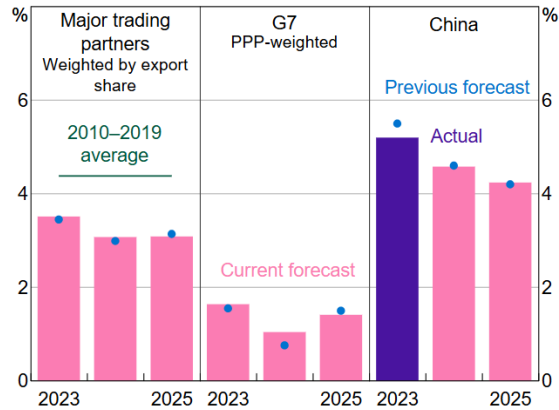
# Economic and social trends



# Economic factors

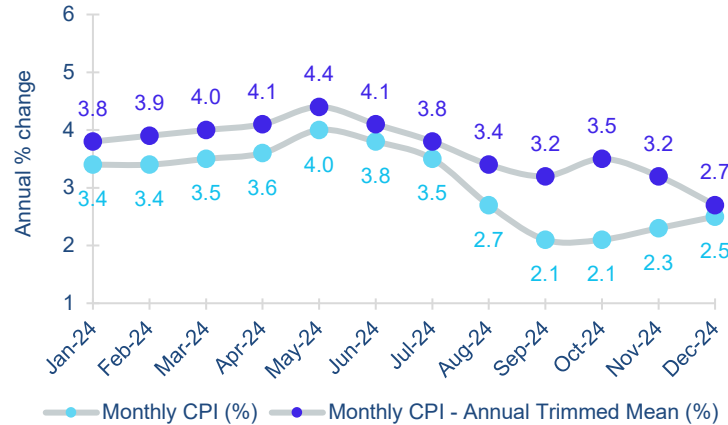
Over this period, Australian aviation benefitted from strong passenger demand and improved travel sentiment which was also supported by easing inflation. However, the operating environment remains challenging, including fuel price volatility, cost pressures, subdued economic growth and geopolitical risks.

Figure 1. Global GDP growth outlook (year-average).



Source: Reserve Bank of Australia ([website](#)) – as at 3/2/2025

Figure 2. Consumer Price Index (CPI) Indicator.



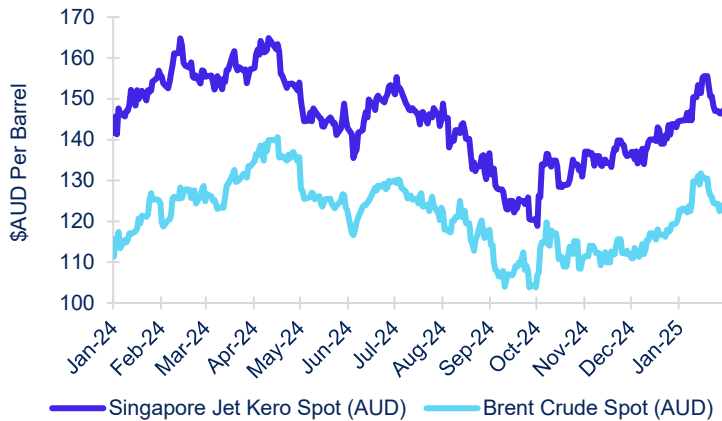
Source: ABS ([website](#)) – as at 3/2/2025

Figure 3. Domestic airfares (best discount).



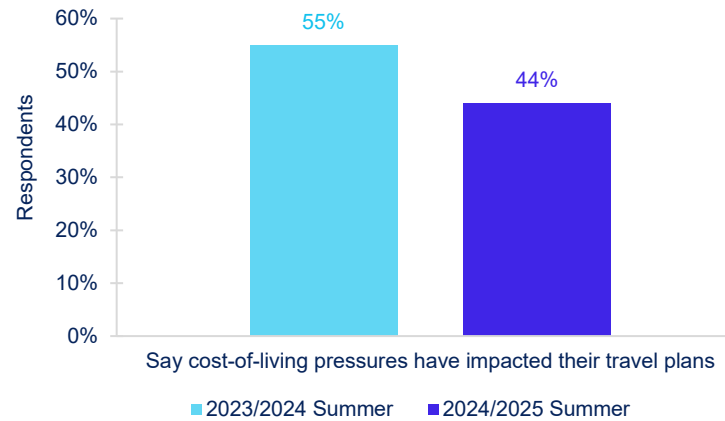
Source: BITRE ([website](#)) – as at 3/2/2025

Figure 4. Jet fuel and Brent crude oil prices.



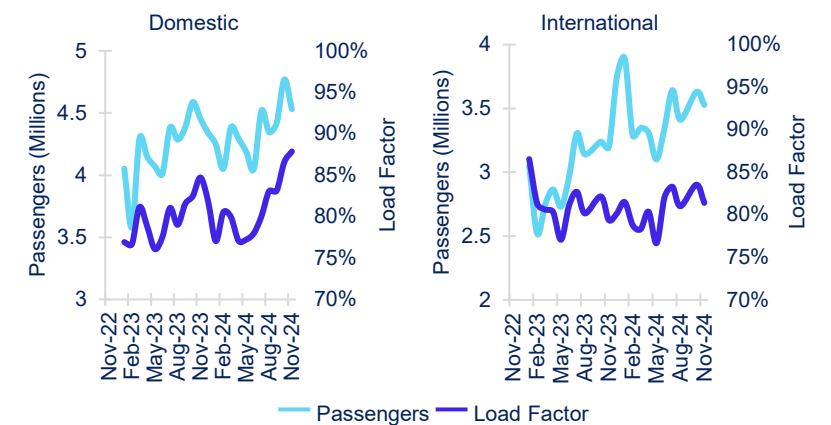
Source: Bloomberg – as at 4/2/2025

Figure 5. Summer travel survey for Australians.



Source: Tourism and Transport Forum ([website](#)) – as at 3/2/2025

Figure 6. Passengers and load factor.



Source: BITRE ([website](#)) – as at 12/2/2025.

# Social factors

During the summer holiday period of December – January, the number of people making aircraft operations noise complaints reduced to the lowest levels in more than 12 months, however the number of complaints made by those people increased by 42% compared to the monthly average during September – November 2024. Cross-industry efforts are focused on noise abatement and maximising over-water operations to provide relief to communities, where safe and feasible. In regard to sustainability initiatives, the adoption of optimised User Preferred Routes in upper airspace has contributed to reduced CO<sub>2</sub> emissions.

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

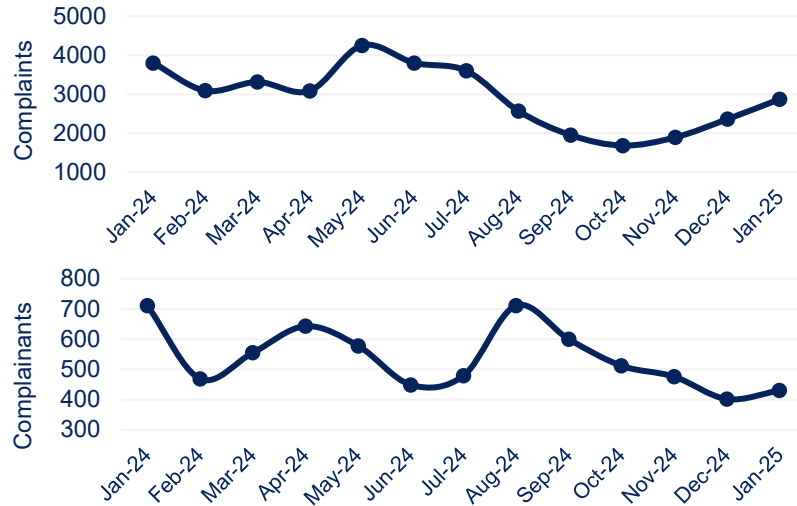


Figure 8. Airport aircraft noise complaints, complainants, and complaints by complainant per month.

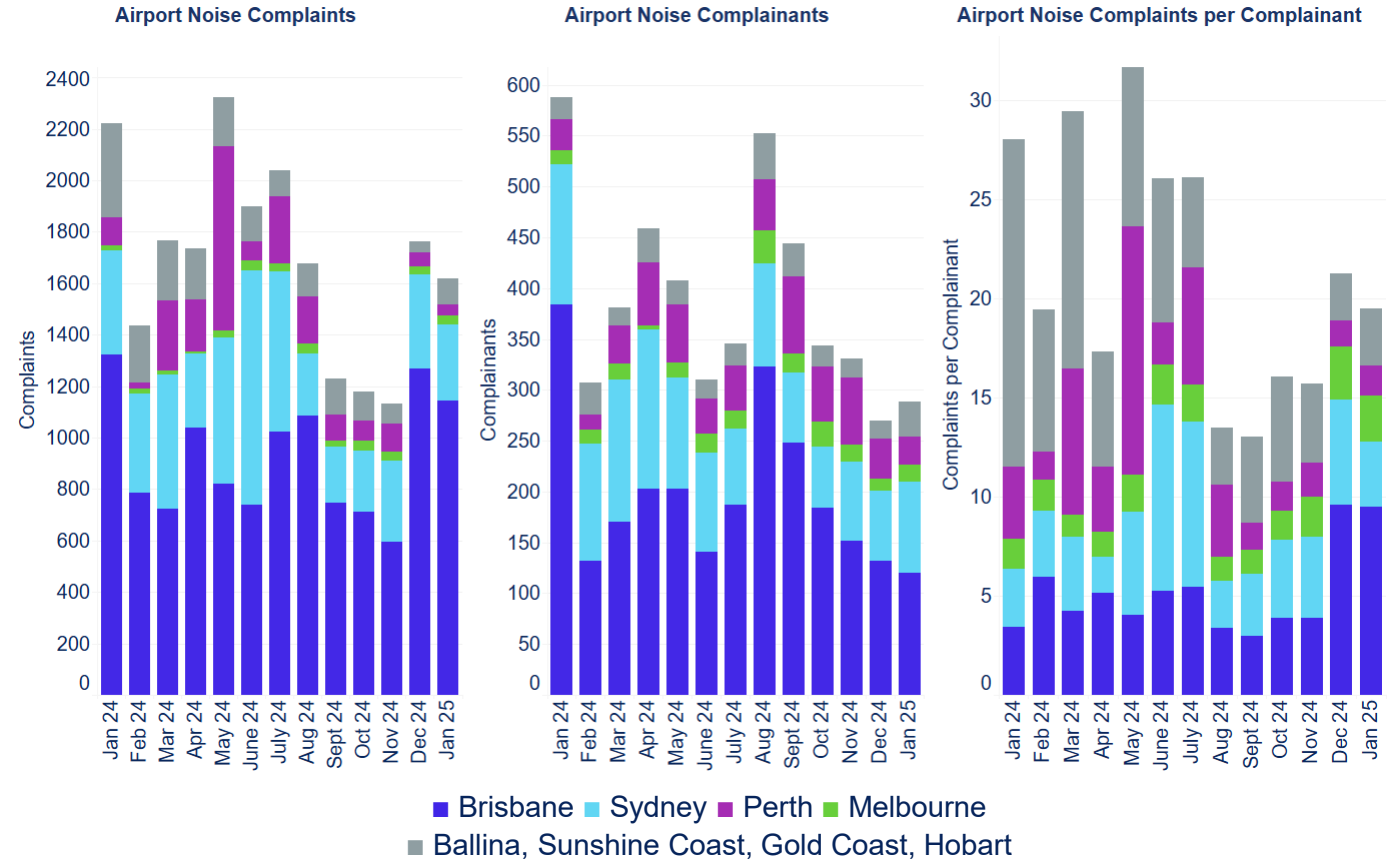
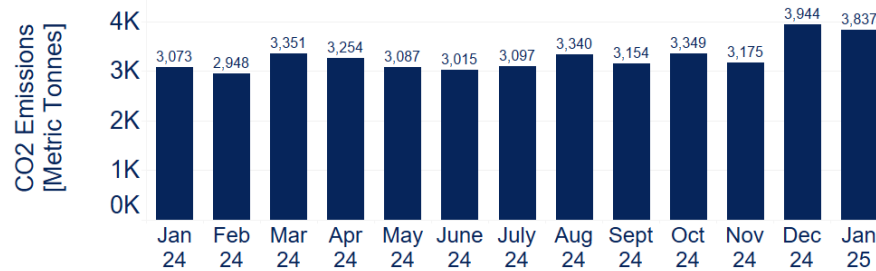


Figure 9. CO<sub>2</sub> emissions savings from optimised User Preferred Routes (UPR) across oceanic and cross-continental airspace per month.



Source: Airservices Noise Complaints and Information Service (NCIS) and Airservices ODAS.

# Australian aviation and regional context

# State of Australian aviation growth

In January 2025, the Australian aviation network recorded an increase of 0.8% in daily flights compared to the previous month. International flights surged by 7% year-on-year, driven by seasonal demand and major events like the Australian Open and Lunar New Year celebrations. However domestic traffic has plateaued below forecast.

## Average Daily Flights

(January 2025 and Year-On-Year Growth)

**3,665**  
-2%

## Total Domestic Flights

(January 2025 and Year-On-Year Growth)

**91,767**  
-3%

## Total International Flights

(January 2025 and Year-On-Year Growth)

**21,833**  
+7%

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

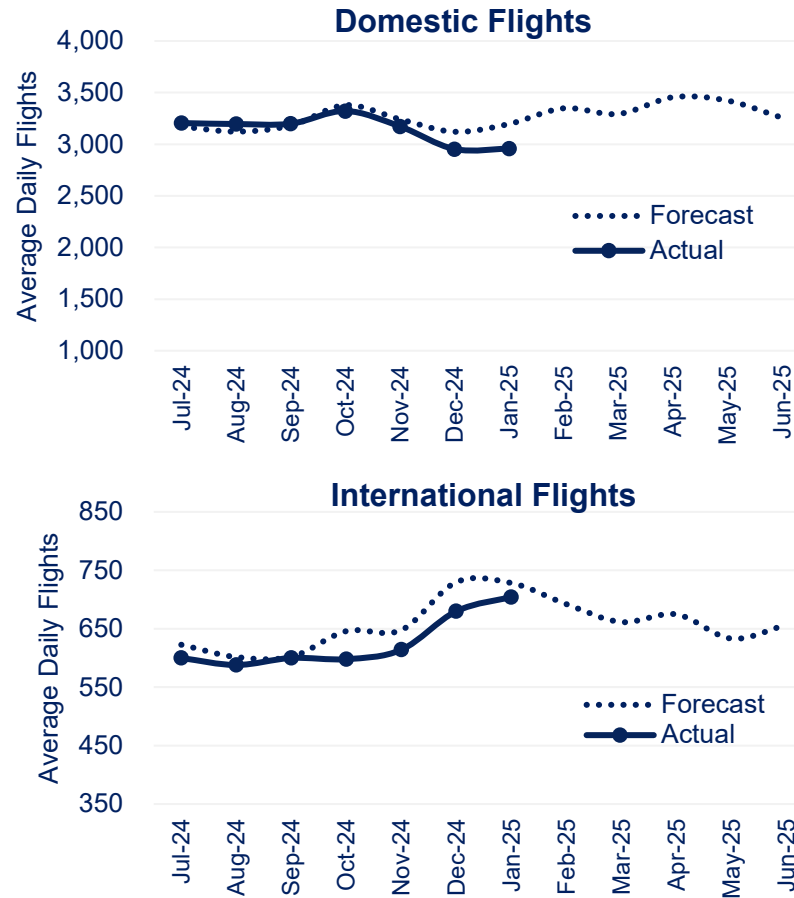
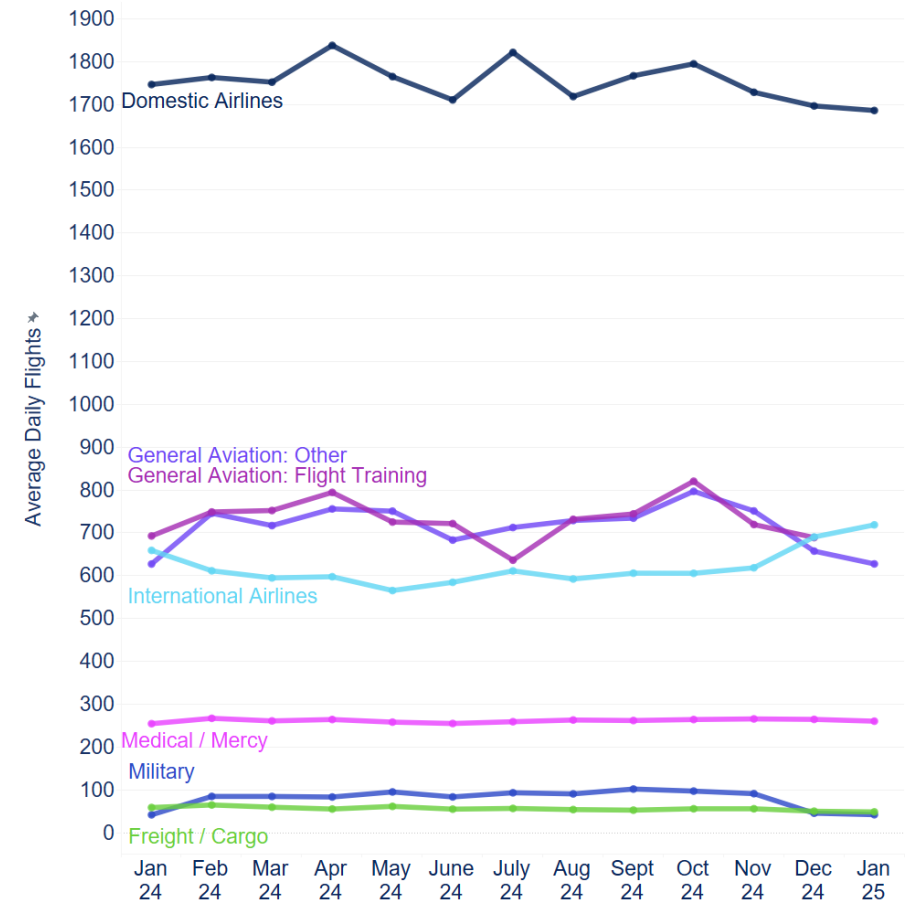


Figure 11. Average daily flights by industry segment per month.



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

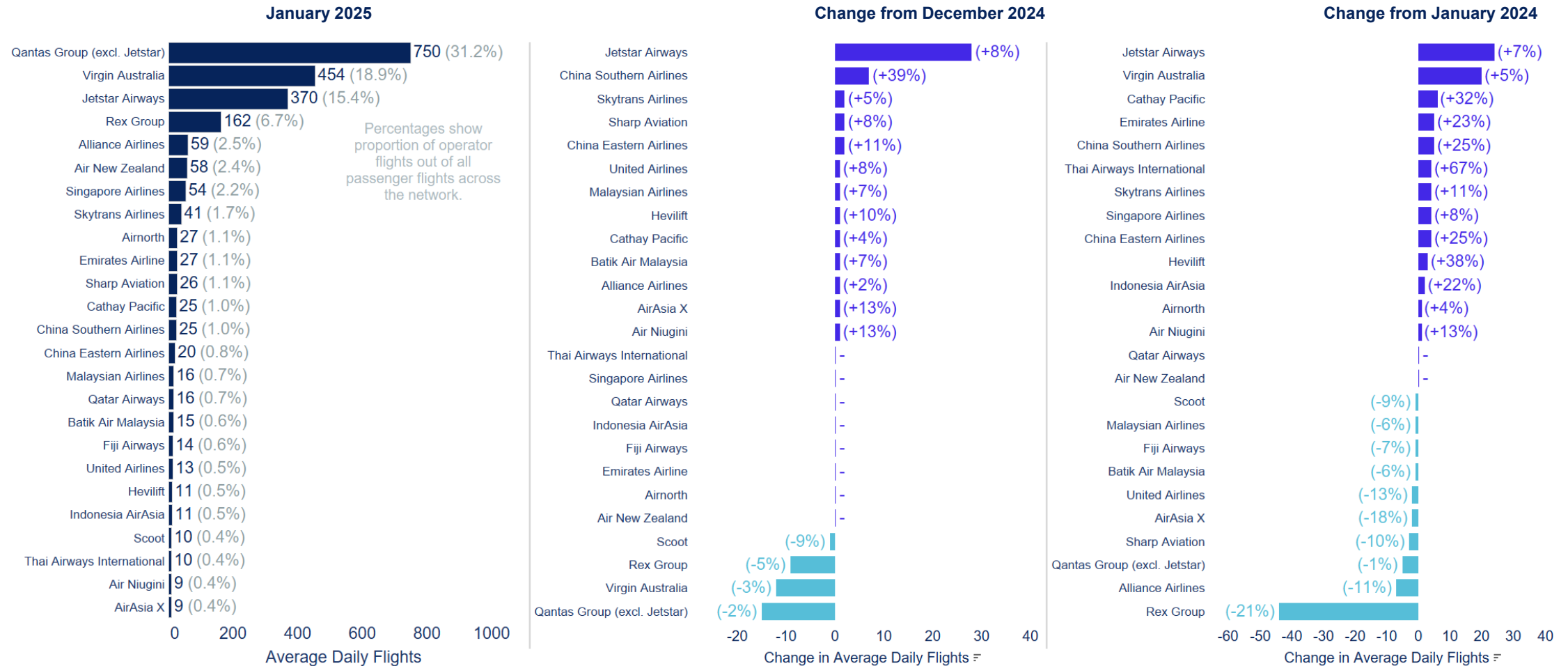
Source: Aircservices aeronautical charge database. Excludes some general aviation flights that are not subject to Aircservices aeronautical charges. Aircservices' forecast proposed as of July 2024 and is subject to review by ACCC.



# Top aircraft operators

Network growth continues to be driven by leisure demand, as evidenced by new routes and increased capacity from Jetstar, Virgin Australia and international hub carriers in China, Middle East and South East Asia.

Figure 12. Average daily flights by top operators (January 2025) and comparisons across two reference periods.

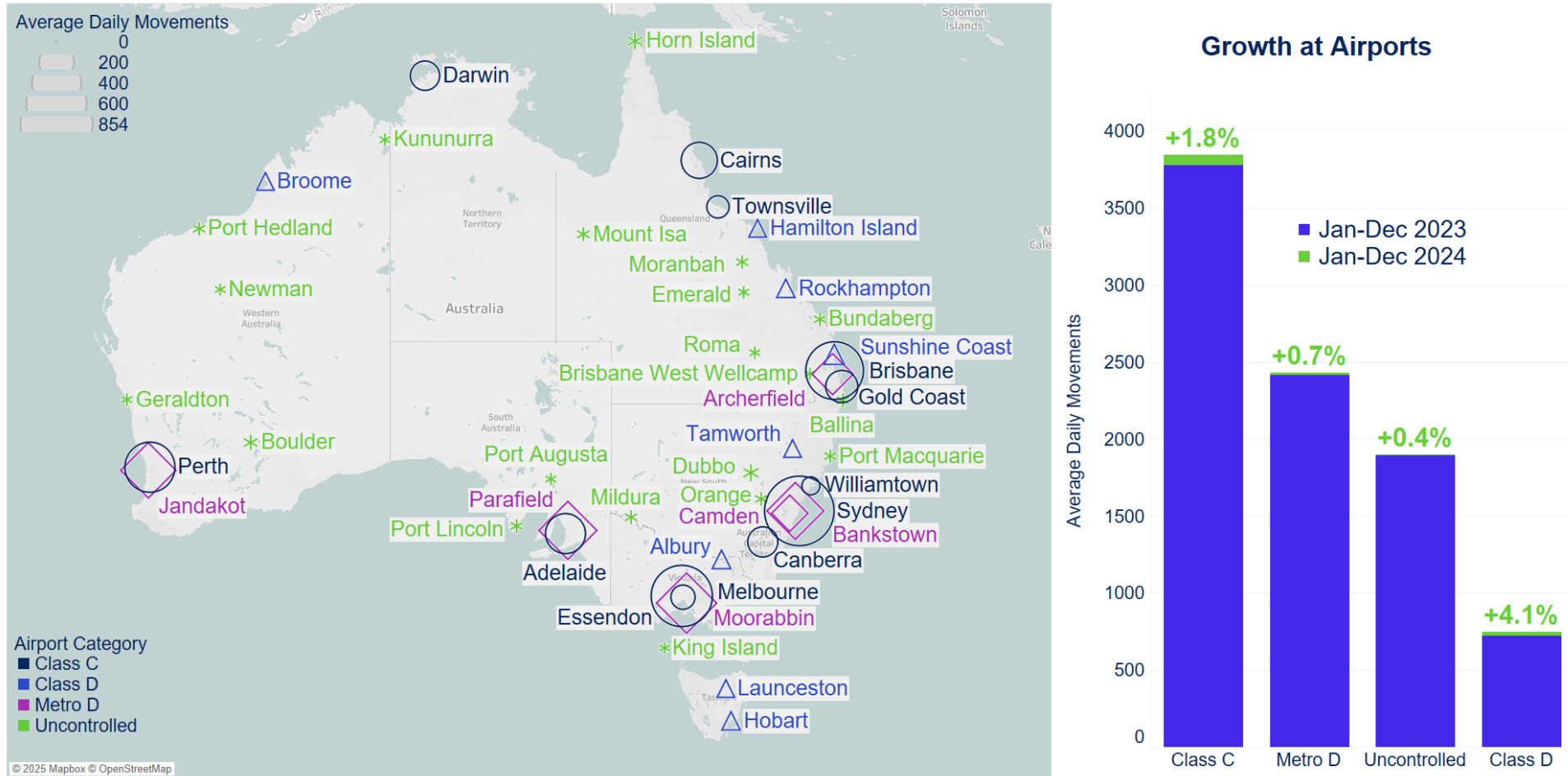


Source: Airservices ODAS (includes airline flights only). Only top 25 airlines by flights are shown.

# Domestic network

We continue to see strong year-on-year regional growth driven by tourism and mining demand at airports.

Figure 13. Domestic airport movements for January to December 2024 (left) and year-on-year growth (right).

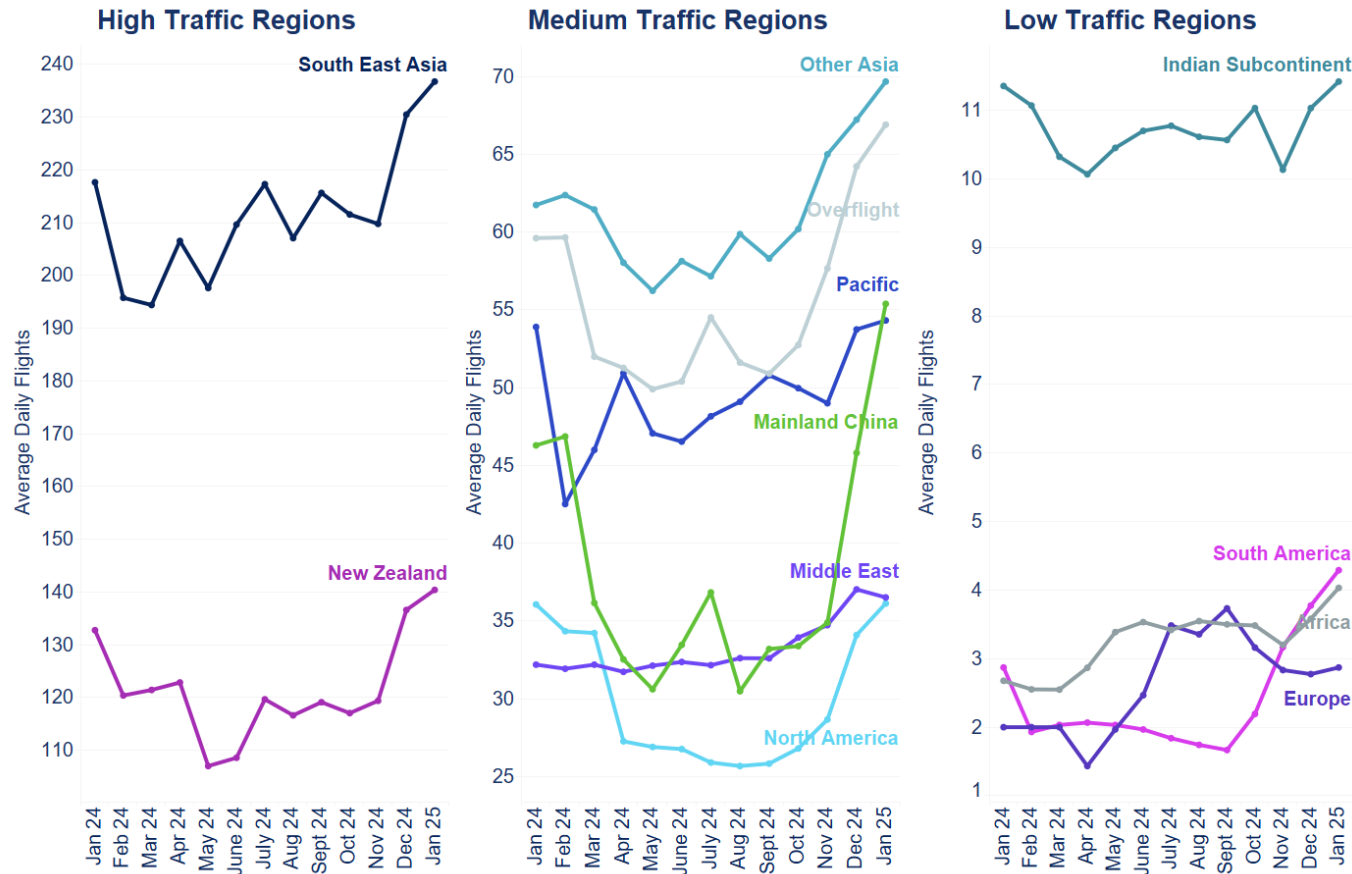


Source: Airservices ODAS (excludes helicopters). Data is one month in arrears due to general aviation flight training. In the map, only the top 20 airports in Class C/D and top 20 uncontrolled airports by movements in 2024 are shown.

# International markets

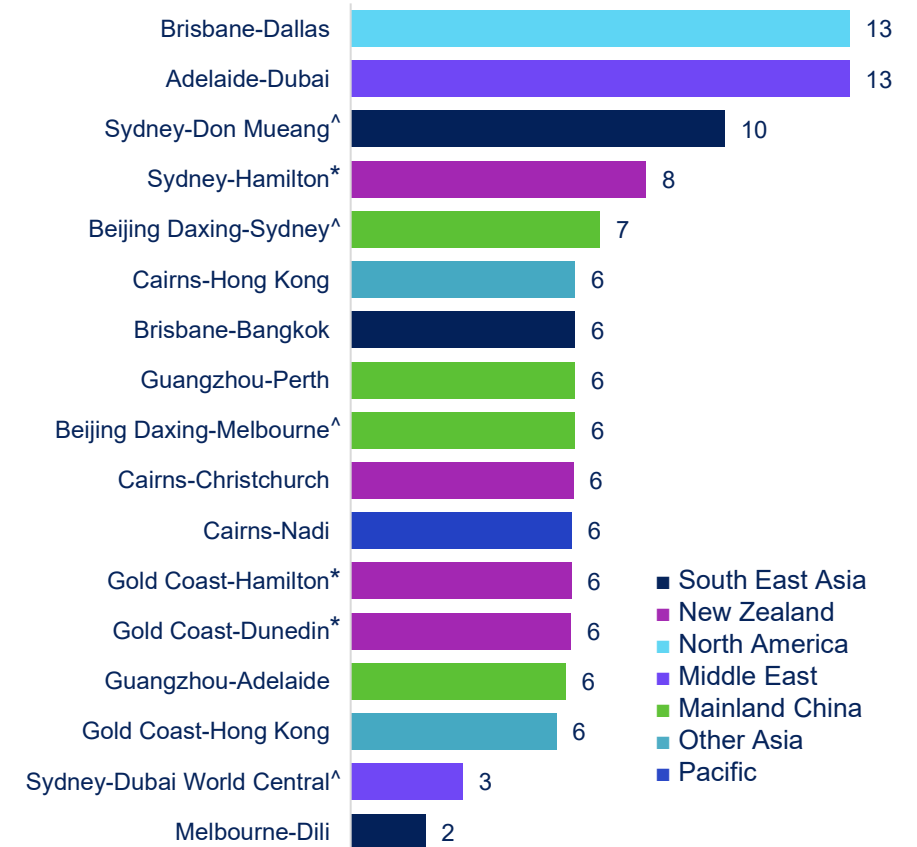
Direct flights to all international markets, except the Middle East, experienced significant growth in January 2025. This trend is expected to continue, with increased capacity for both seasonal and non-seasonal flights across these markets supported by fleet renewal bringing enhanced range and operating capabilities.

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



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

Figure 15. Average weekly flights for new routes in 2025.

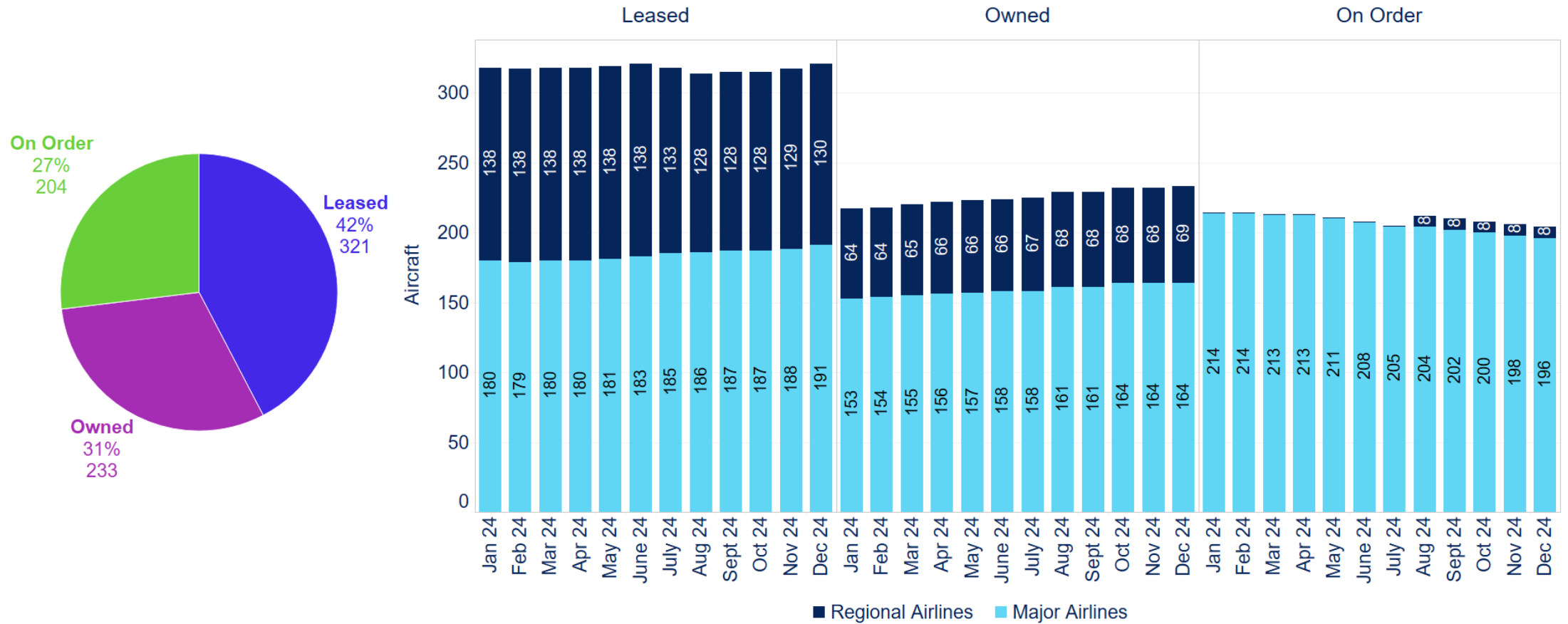


Source: OAG, as of February 2025.  
\*Non-seasonal route. ^Additional route to the city's alternative international airport.

# Australian fleet

As global fleet renewal faces challenges due to supply chain disruptions, capacity expansion has increasingly relied on strategic acquisition and lease arrangements, especially for regional airlines. Airlines have leased extra aircraft to meet rising demand and manage high load factors to ensure service levels are maintained during peak periods.

Figure 16. Australian fleet financial status from major domestic operators, including total for the past month of December 2024 (left) and the past 12 months (right).



Source: Centre for Aviation Fleet (CAPA) data, as of 4 February 2025. Data for January 2025 is not available. Includes only major domestic operators that contribute to 78% of total flights in the network.

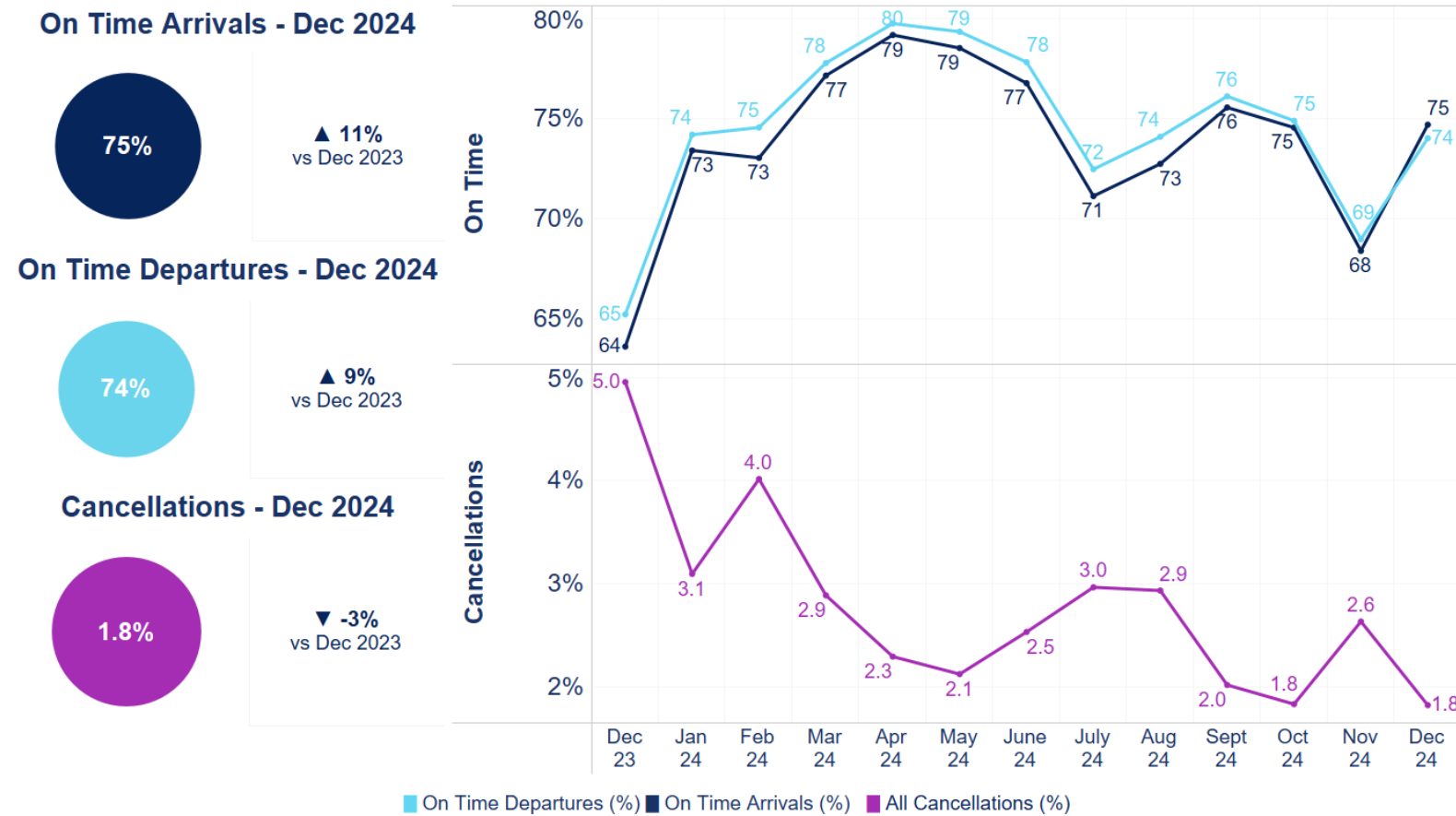
# Australian aviation network performance



# On-Time Performance (OTP) in the previous month

In the previous month of December 2024, there was a significant improvement in OTP and flight completion rates. This improvement reflected the cross-industry focus on adding capacity and collaborative network decision-making to protect the holiday season.

Figure 17. Total industry OTP and cancellations (data available up to 31 December 2024 based on latest BITRE data release).



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

Figure 18. Global arrival OTP and cancellations rates in comparison to Australia (December 2024). Includes all major airlines in each region.

Region	OTP	Cancellations
Europe	74%	1.1%
Northeast Asia	82%	0.7%
South & Southeast Asia	75%	0.2%
Middle East	83%	0.1%
North America	77%	0.9%
Latin America	78%	1.7%
Africa	66%	0.9%
New Zealand & Fiji	68%	3.0%
<b>Australia*</b>	<b>75%</b>	<b>1.8%</b>

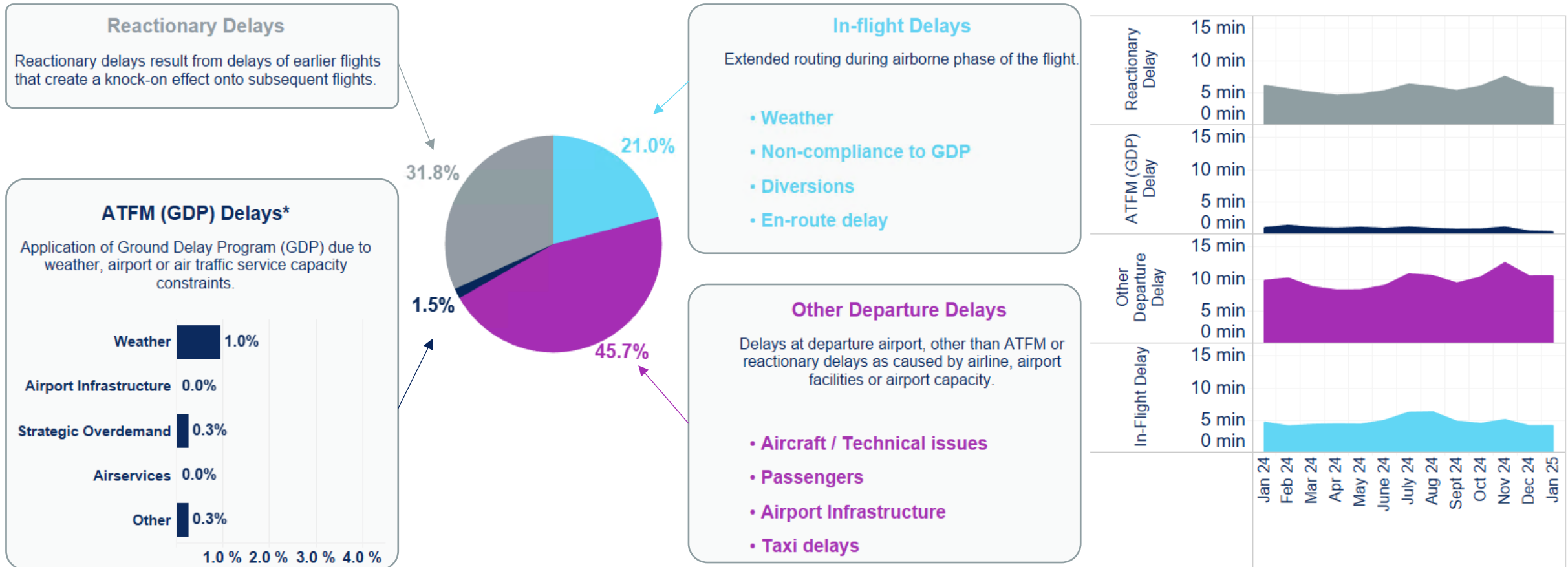
\* Data for Australia includes domestic flights only.

Source: BITRE for Australian data and OAG ([website](#)) for global data

# Lead indicators of OTP

As lead indicators for OTP for January 2025, the key components of network delays remained steady, despite severe weather in Sydney in mid-January. This suggests that driving resilience and collaboration in network decisions continue to improve overall performance outcomes.

Figure 19. Breakdown of delay components for major Australian airports, as a percentage of total delays for January 2025 (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.

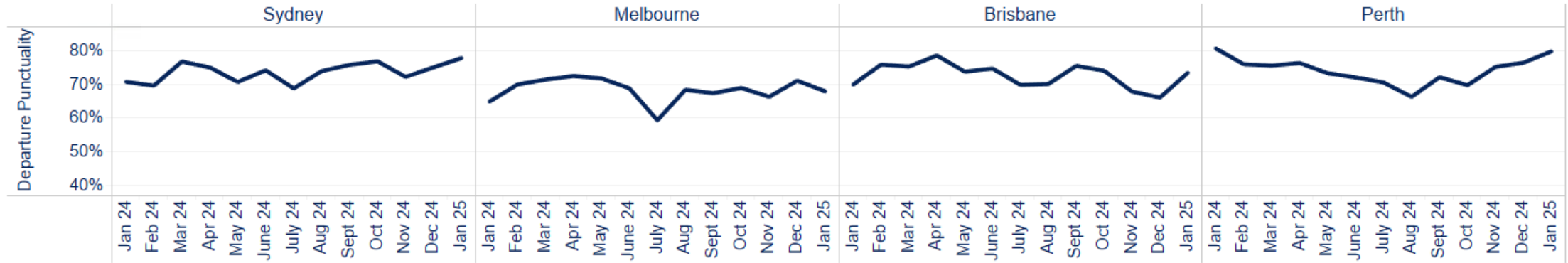
\*The ATFM system allows airlines to change GDP slots and adjust delays compared to their original allocation.

# First wave performance

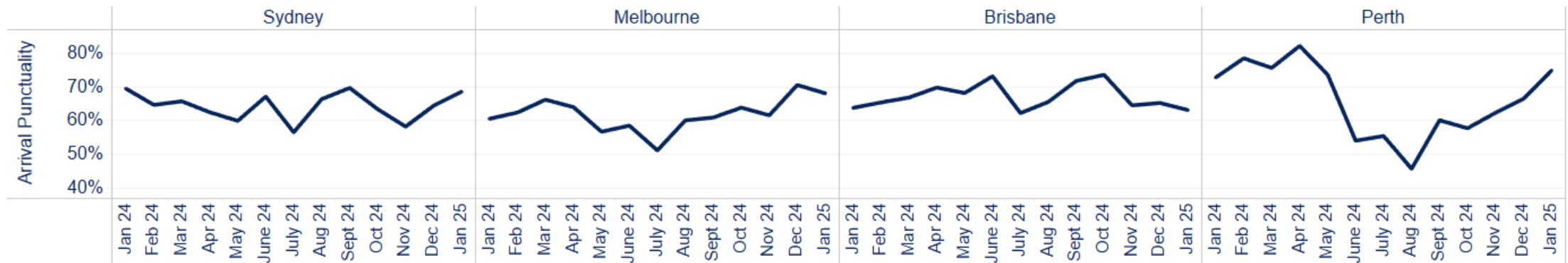
First wave performance at major airports has improved as a result of collective industry efforts. Key influencing factors included refining aircraft turnaround management, optimising flight schedules, and increasing collaboration across airlines, airports and air traffic service for weather and disruption management.

Figure 20. First wave punctuality for major Australian airports by month (January 2025).

## 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.

# Air Traffic Flow Management (ATFM)

The application of Ground Delay Program (GDP) remained minimal as a result of reduced demand during the January school holiday period and strengthened network governance without adversely impacting airborne delays. There was no GDP at Melbourne and Brisbane in January 2025. On 17 January, extreme storms and wind conditions in Sydney inundated airport infrastructure and rendered the Instrument Landing System on Runway 16L unavailable until early morning on the next day accounting for nearly 30% of the month's GDP delays. Prompt system restoration ensured effective network recovery.

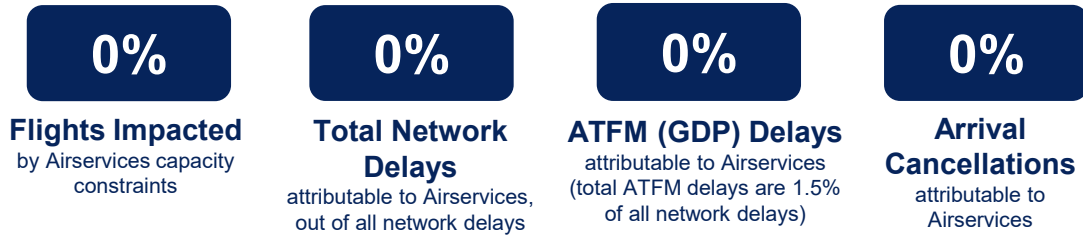


Figure 21. GDP application hours, airborne delay, and compliance.

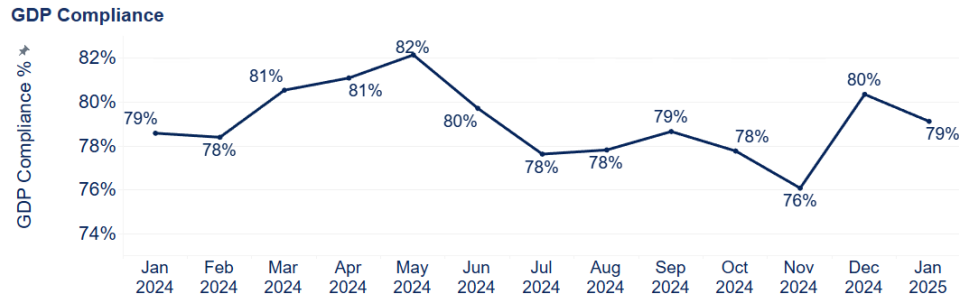
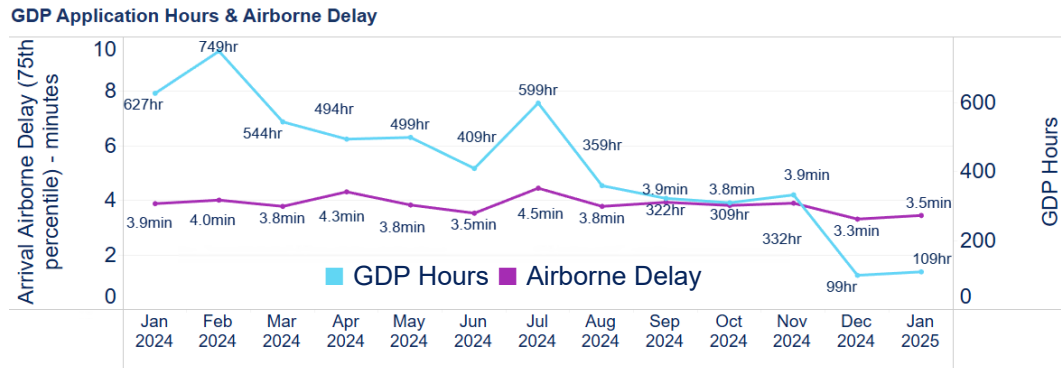
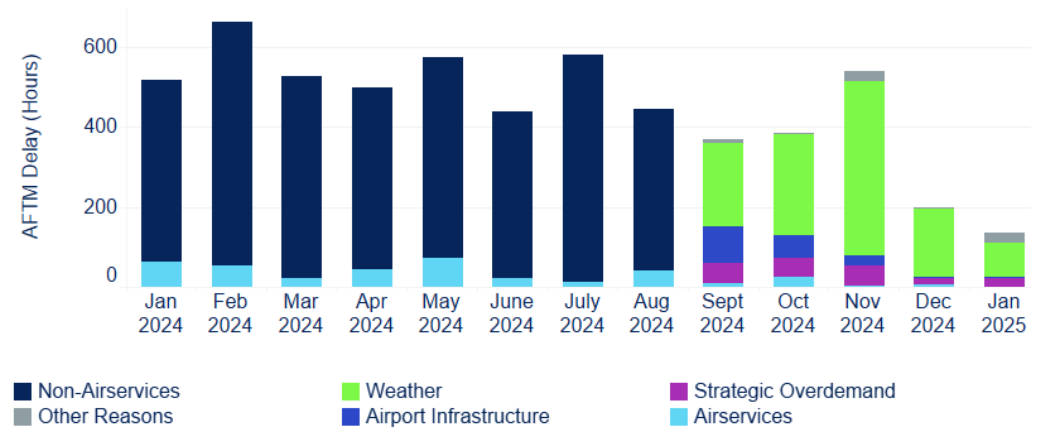
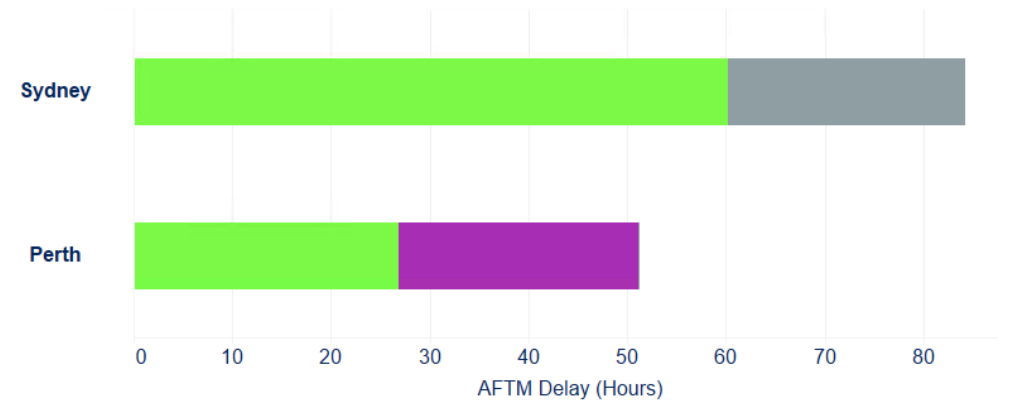


Figure 22. ATFM (GDP) delay by attribution per month (top) and for January 2025 (bottom).



ATFM (GDP) Delay by cause (January 2025)

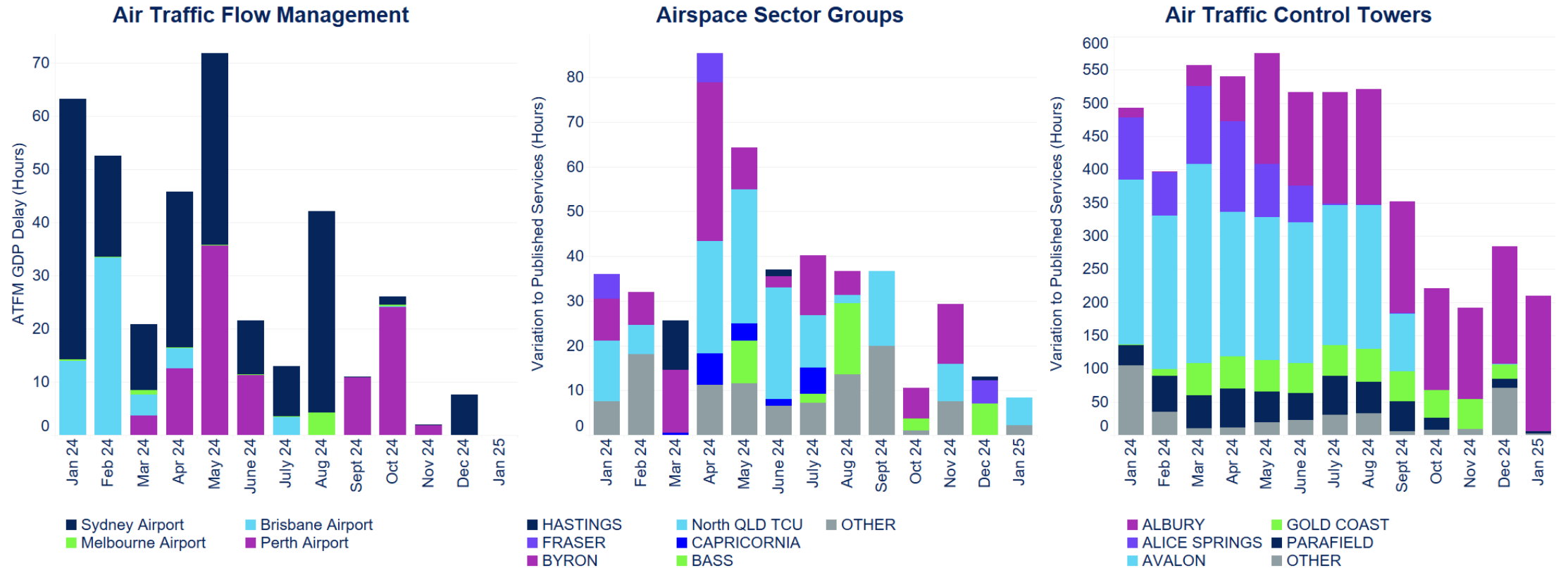


Source: Airservices ODAS. A GDP is an agreed industry plan to balance the demand (based on airline schedules) to the available runway capacity that is collaboratively agreed (refer to [GDP Fact Sheet](#)). GDP compliance represents the proportion of flights into an airport that departed compliant with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

# Air Traffic Service Provision

Air traffic service performance has continued to improve. In January, there were no Airservices attributable GDP delays, two events of enroute airspace service variations and one unplanned tower service variation at Parafield that was closely coordinated with local operators to avoid industry impact. Ensuring consistency of our services remains our priority, including at regional airports that cater for general aviation activities. We are actively engaging with general aviation operators to better understand their ongoing needs and adjust our recruitment, training and rostering approaches to enable this important sector of our industry.

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



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