



Australian Aviation Network Overview

February 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

In February 2025, the Australian aviation network recorded a near five percent increase in average daily flights compared to the previous month, driven by strong domestic demand. After consolidating from the holiday peak, year-on-year international traffic growth remained positive.

The overall industry operational reliability continues to improve in terms of on-time performance and first wave punctuality. This reflects the aviation sector's collective efforts over the last three months, such as strengthening network governance, adding aircraft to meet surge demand and providing standby resources for disruption management.

In February, we saw an increase in ground delay attribution to Airservices. This was driven largely by staffing impacts at Sydney tower on 14 February during a weather event, and in the airspace volume in northern New South Wales in the latter half of the month. We understand the impact this has on our customers and we have focussed efforts to improve our management and notification processes to provide advice as early as possible to minimise impacts.

We are taking all necessary measures to strengthen our service resilience and response capability to unexpected disruptions. Currently, we are undertaking the largest recruitment and training program in Airservices' history. Following the endorsement of 52 new air traffic controllers last year, we expect another 85 controllers to enter service this year. Our workforce resilience program is also a key priority to enable reliable and flexible resource utilisation through reforming our systems and processes.

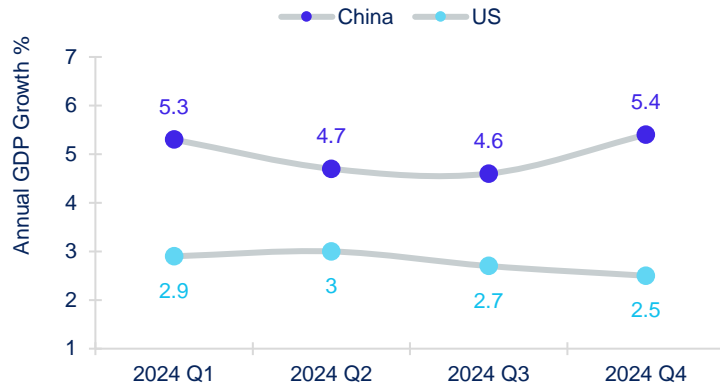
During this reporting period some significant events occurred impacting the airspace and industry. Airservices coordinated with government and industry stakeholders a response to the Chinese warship exercises in international waters between Australia and New Zealand. More recently, in preparation for Tropical Cyclone Alfred, our industry has again proven resilient and collaborative in times of crisis, ensuring the effective management of the event and resumption of normal operations. Airservices has a unique role in bringing the industry together and facilitating common situational awareness and informed critical decision-making. As an industry we will review our response processes to continually improve our crisis management capabilities.

Economic and social trends

Economic factors

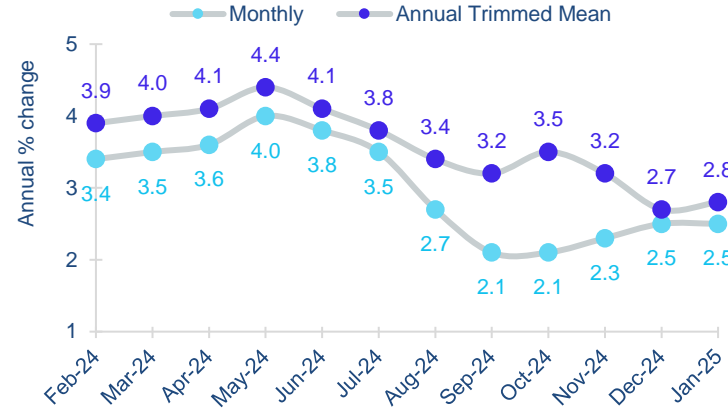
The Australian aviation sector is showing positive signs with rising consumer sentiment, easing inflation and improvement in China's economy that bolsters the outlook for tourism and trade. However, challenges remain with fluctuating jet fuel prices, airfares, trade policies, and ongoing geopolitical risks.

Figure 1. GDP growth for Australia's largest trade partners.



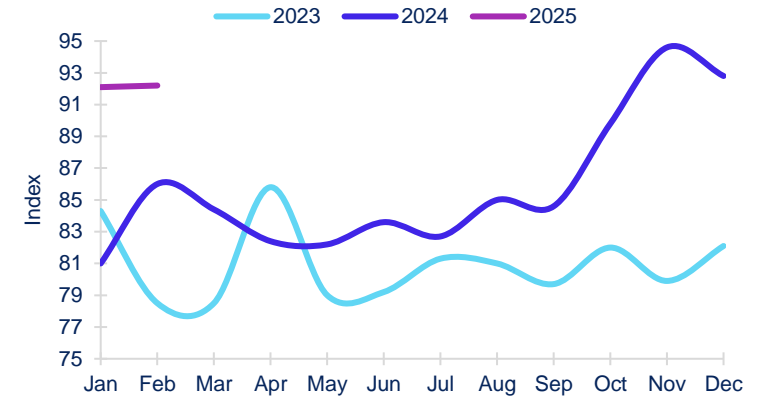
Source: Trading Economics ([website](#)) – latest data to December 2024 as at 3/3/2025

Figure 2. Consumer Price Index (CPI) Indicator.



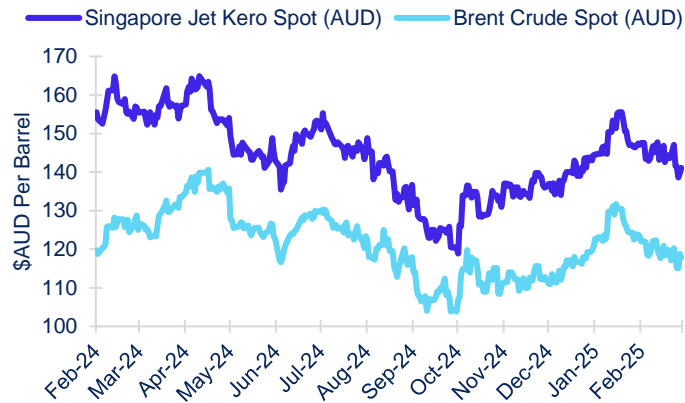
Source: ABS ([website](#)) – latest data to January 2025 as at 3/3/2025

Figure 3. Westpac Melbourne Institute Consumer Confidence.



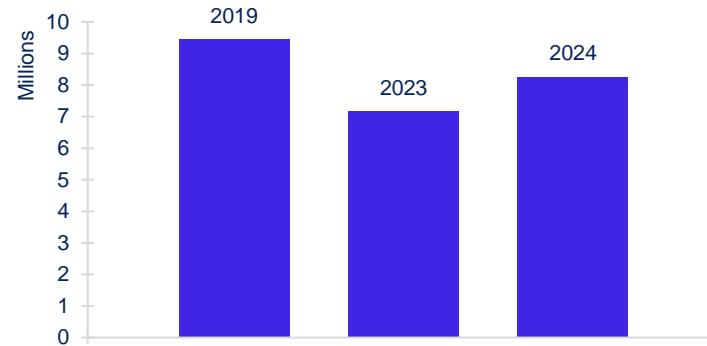
Source: Westpac Economics ([website](#)) – latest as at 3/3/2025

Figure 4. Jet fuel and Brent crude oil prices daily.



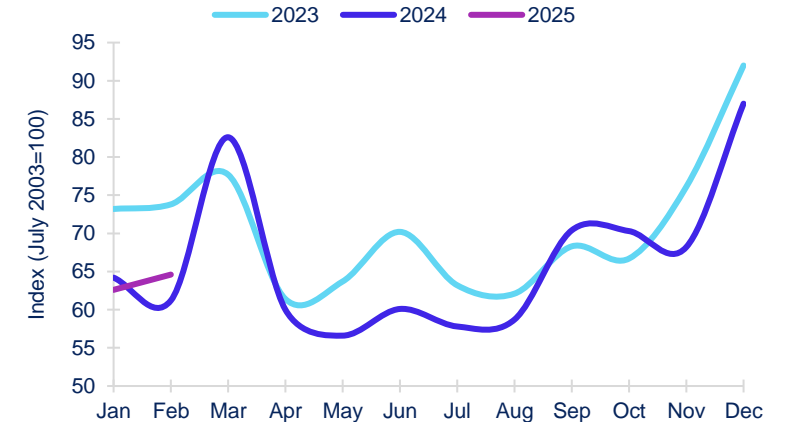
Source: Bloomberg – latest data as at 3/3/2025

Figure 5. Short-term tourist arrivals.



Source: ABS ([website](#)) – latest data to December 2024 as at 3/3/2025.

Figure 6. Domestic airfares (real best discount).



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

Social factors

In February 2025, nation-wide aircraft noise complaints decreased by 44% compared to the previous month and reached their lowest levels in two years. The number of complainants has remained steady over December, January and February. This reduction in aircraft noise complaints per complainant has likely been due to no active community engagement on flight path changes underway over this period and a decrease in runway works at some airports which can affect flight paths leading to community concerns.

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

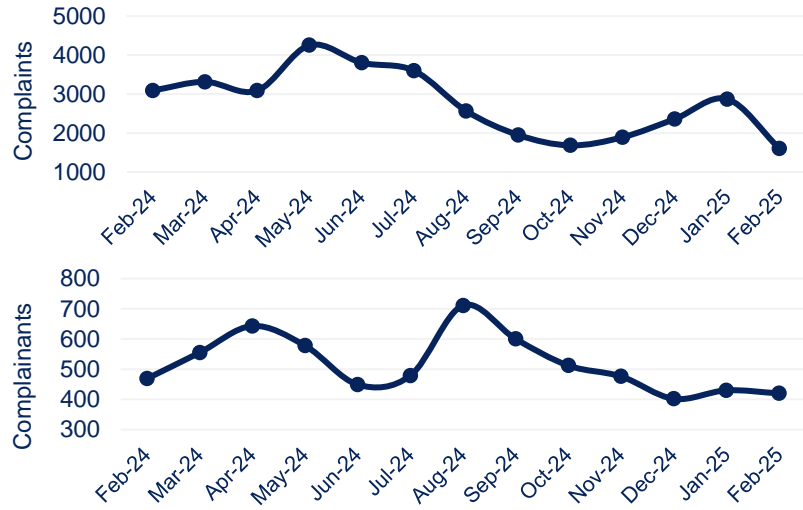


Figure 8. Aircraft noise complaints, complainants, and complaints by complainant per month at key locations.

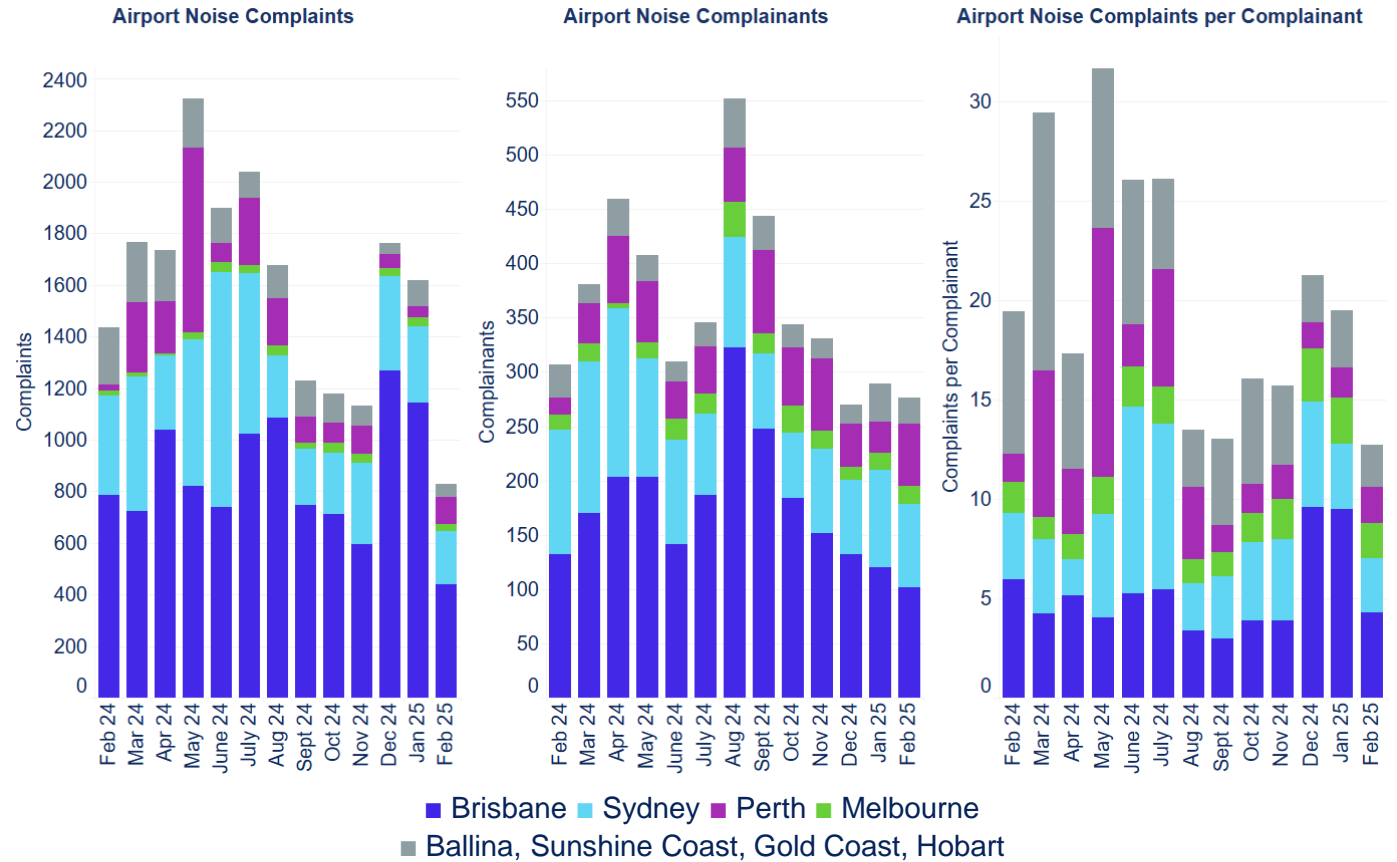
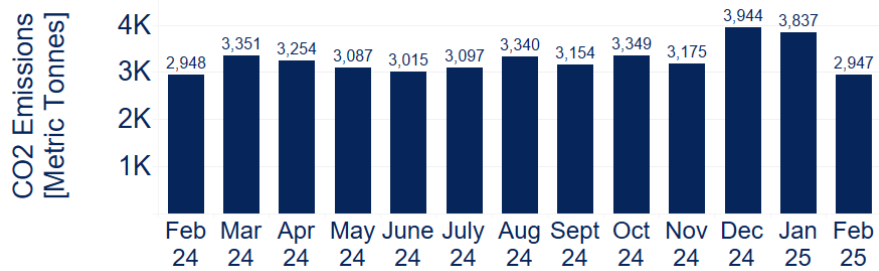


Figure 9. CO₂ emissions savings from optimised User Preferred Routes (UPR) across oceanic and cross-continental airspace per month.



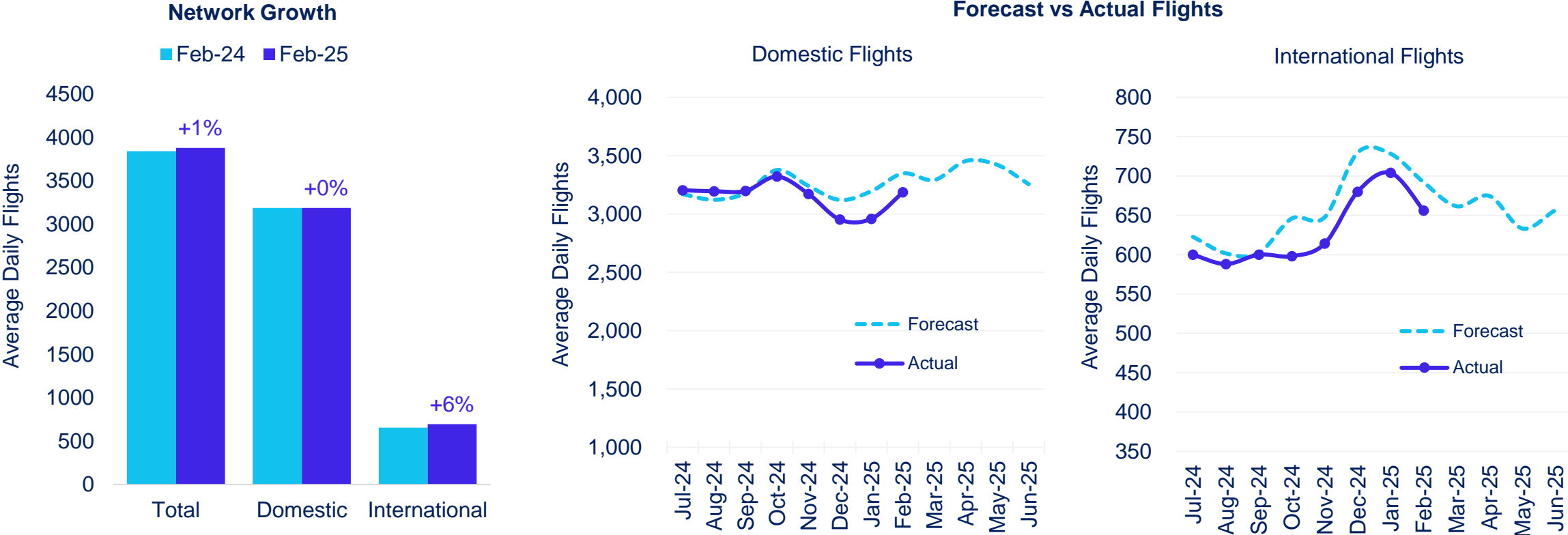
Source: Airservices Noise Complaints and Information Service (NCIS) and Airservices ODAS.

Australian aviation and regional context

State of Australian aviation growth

The Australian aviation network recorded a ~5% increase in average daily flights from the previous month, driven by a seasonal return of domestic demand after the holiday period. While the month-on-month change in domestic and international flights aligns with expected seasonal patterns, the traffic volume remains below Airservices' forecast. There are a number of influences, including structural changes in the airline market and constraints on aircraft availability due to manufacturing and supply chain challenges, and global demand.

Figure 10. Network growth for February 2025 vs February 2024 (left) and actual flights compared to Airservices' forecast (shown in dashed line) per month.

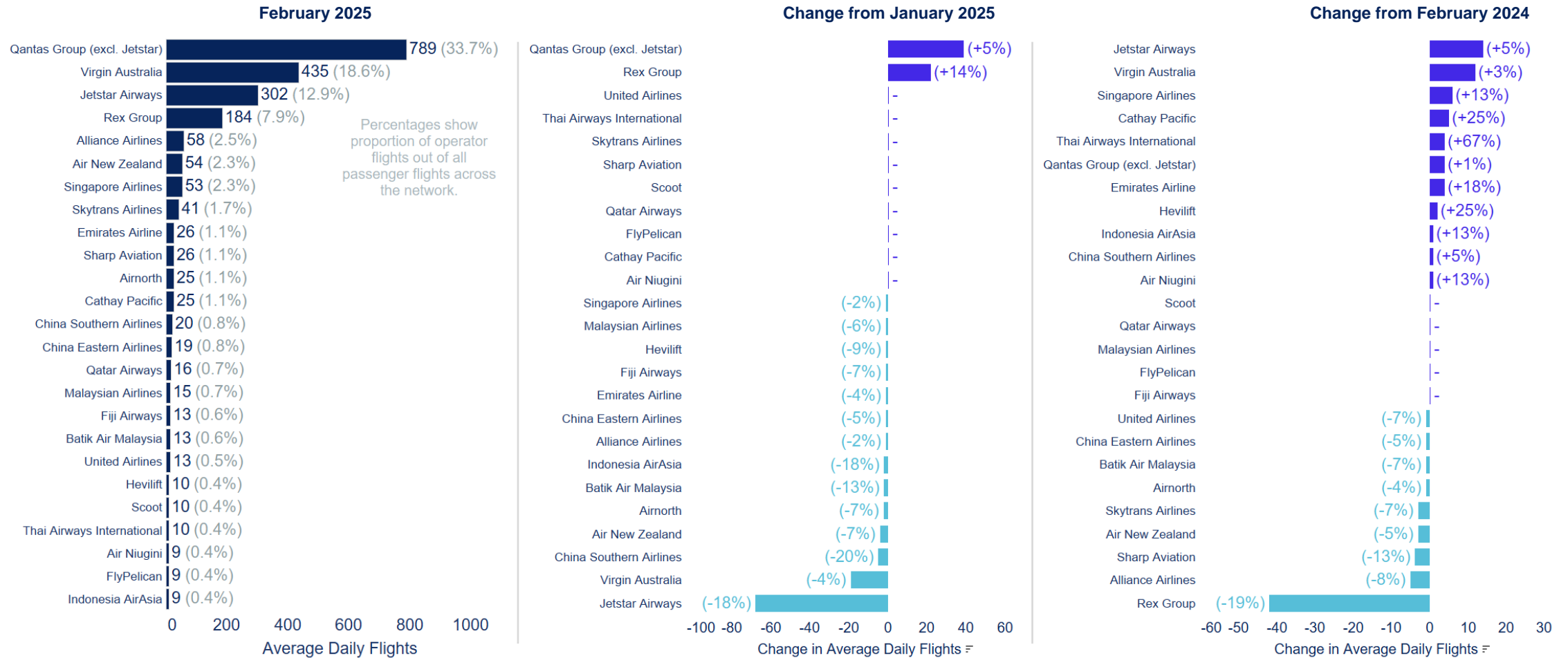


Source: Airservices aeronautical charge database. Excludes some general aviation flights that are not subject to Airservices aeronautical charges. Airservices' forecast proposed as of July 2024 and is subject to review by ACCC.

Top aircraft operators

A typical seasonal shift from leisure to business traffic was observed after the holiday season. Year-on-year growth continues to be driven by major hub carriers in South East Asia, the Middle East and Hong Kong markets.

Figure 11. Average daily flights by top operators (February 2025) and comparisons across two reference periods.

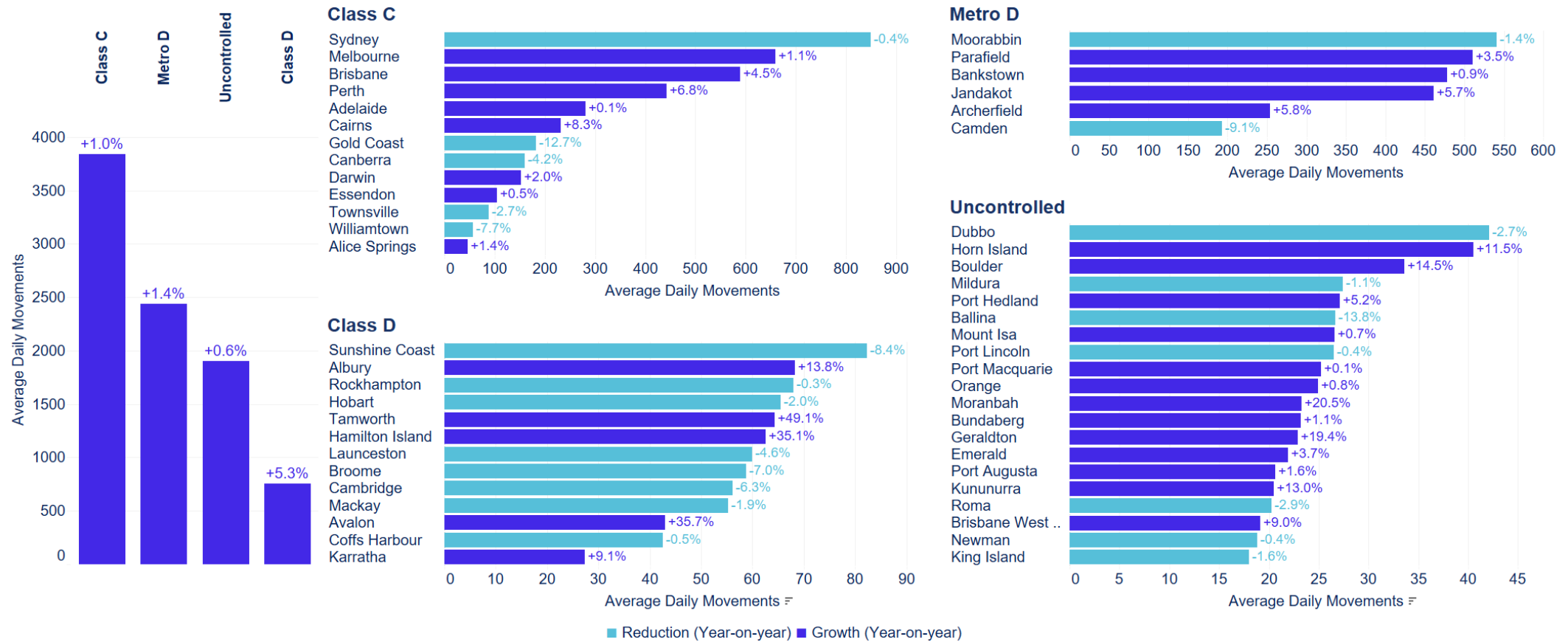


Source: Airservices ODAS (includes airline flights only). Only top 25 airlines by flights are shown.

Domestic network

We continue to observe varied growth patterns in the airport sector, with unprecedented investments in infrastructure to build the capacity needed to meet increasing network demands. In response to the ongoing regional growth, we are adapting our workforce planning, traffic management and safety engagement approaches to better support the regional and general aviation sector.

Figure 12. Growth at airports by category (February 2024 to January 2025 – 12 months, and year on year change).



Source: Airservices ODAS. Excludes helicopters and airports primarily used for military operations. Data is one month in arrears due to general aviation. Only top 20 airports are shown for uncontrolled category. At airports without a tower only VFR movements with a flight plan are listed.

International markets

International traffic shares remain consistent year-on-year, reflecting stable consumer travel patterns. The outlook for 2025 is positive, with a 5% increase in scheduled flights and available seats compared to 2024. Markets like Hong Kong, Thailand, Malaysia, and the Middle East are expected to see double-digit capacity increases. Airline codeshares and partnerships will further enhance international connectivity.

Figure 13. International markets traffic share for February of 2024 and 2025

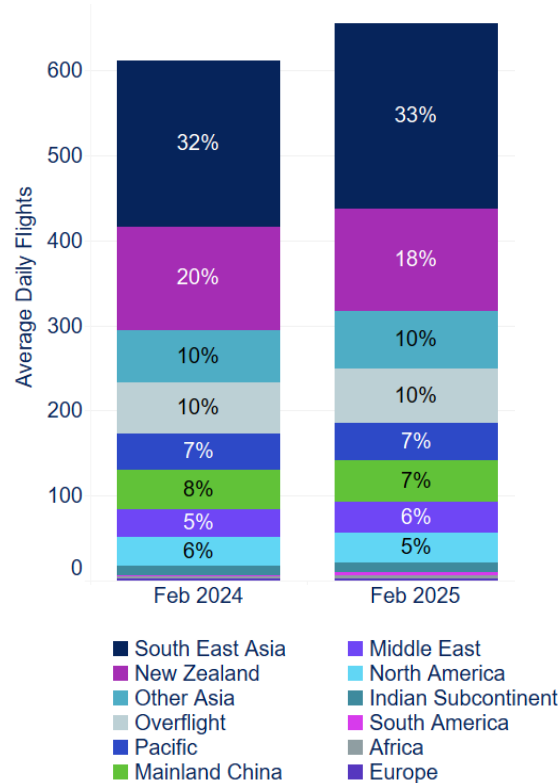
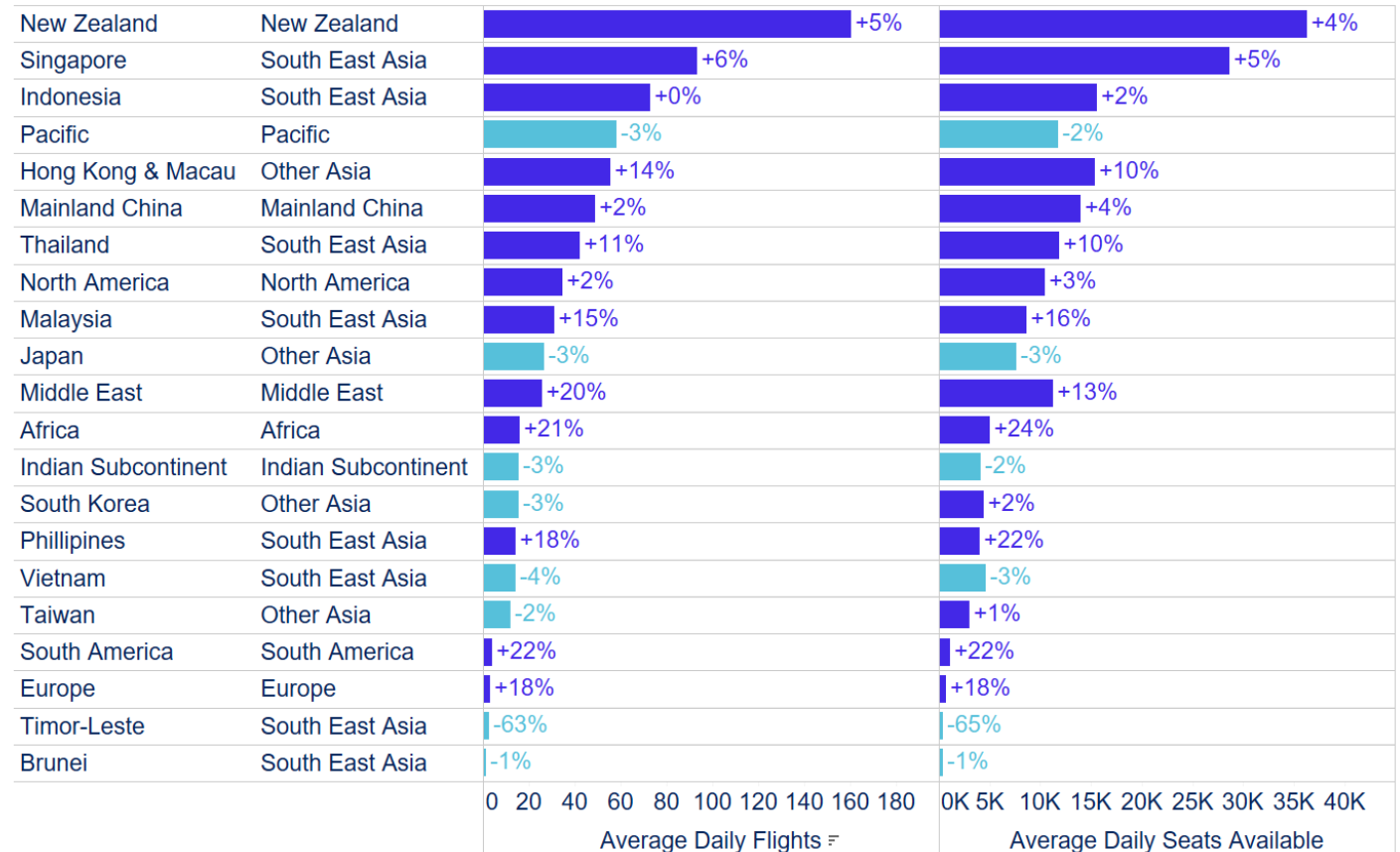


Figure 14. International markets capacity outlook for 2025 by flights and seats, and year-on-year change.

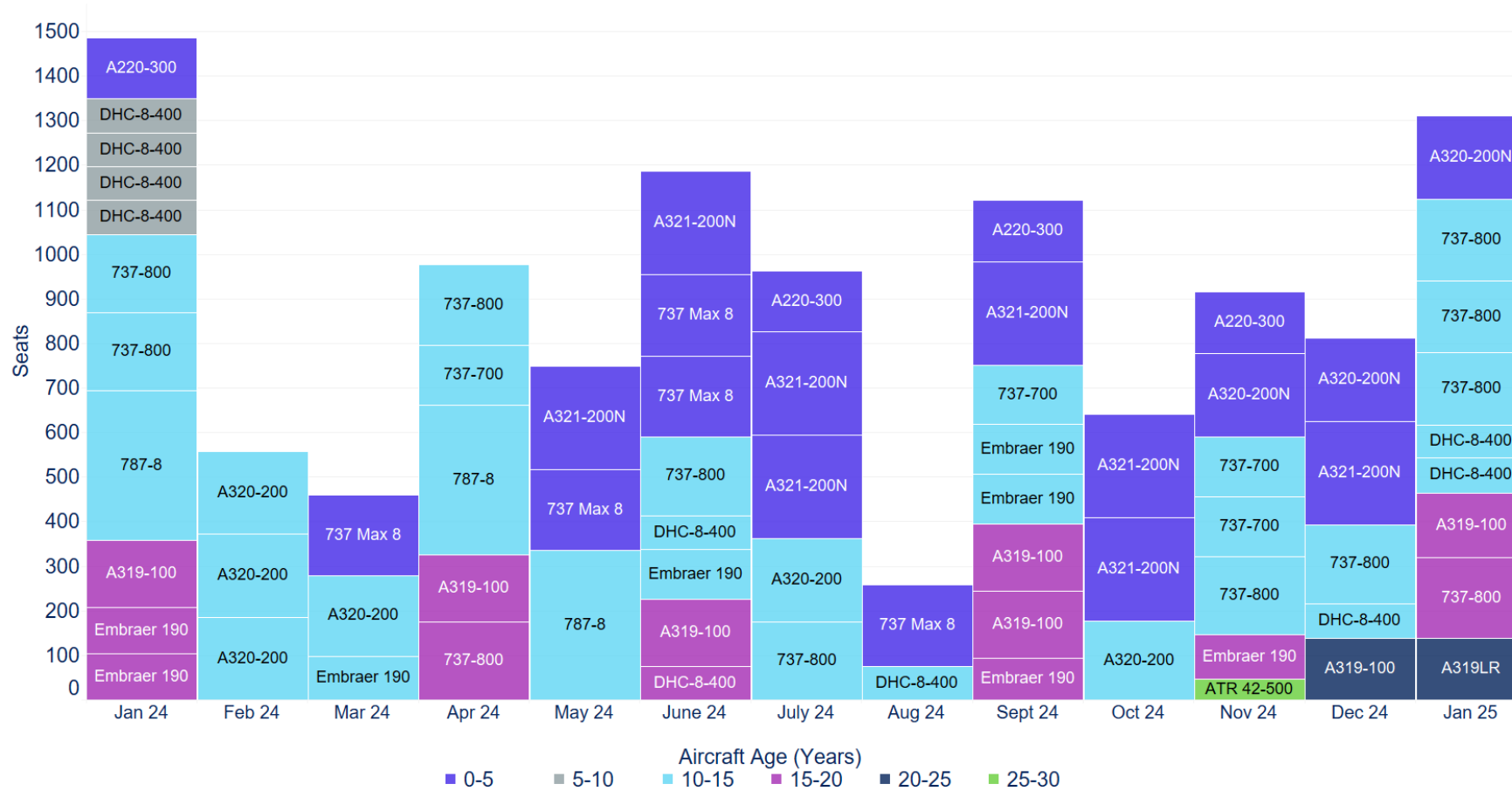


Source: Airservices ODAS (includes airline flights only).
For multi-leg flights, legs that start and end outside Australian airspace are not included.

Australian fleet

The ongoing replacement of aging fleets with larger, newer aircraft is improving connectivity and operational performance, benefiting markets like South Australia. However, the overall rate of new aircraft introduction remains constrained by ongoing aviation supply chain challenges.

Figure 15. Domestic fleet changes in terms of additional aircraft in service and associated seats in the past 12 months, with aircraft age in years.



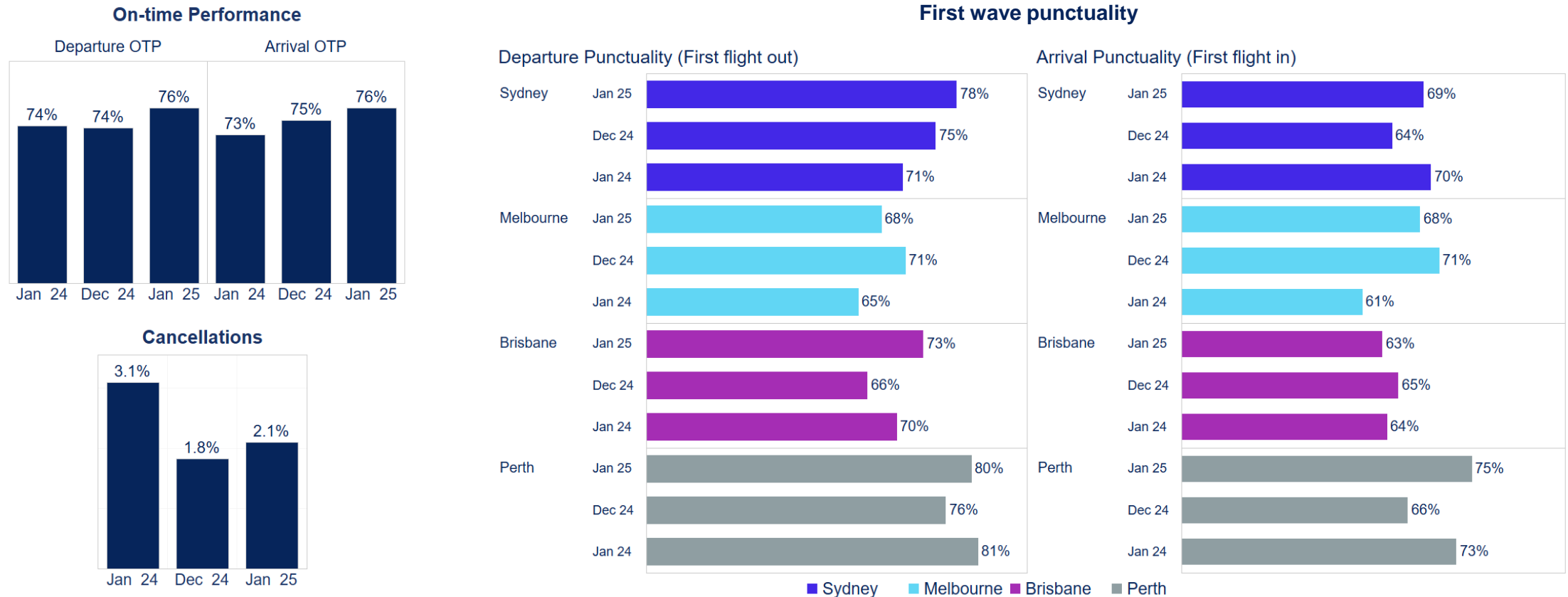
Source: Centre for Aviation Fleet (CAPA) data, as of 4 March 2025. Data for February 2025 is not available. Only aircraft with at least 50 seats are shown.

Australian aviation network performance

Industry OTP and first wave performance

The industry operational reliability continues to improve in terms of on-time performance and first wave punctuality. This reflects the aviation sector's collective efforts over the last three months, such as tightening network governance, adding aircraft to meet surge demand and providing standby resources for disruption management.

Figure 16. Total industry OTP and cancellations (left) and first wave punctuality at airports (right) for three reference periods (January 2025, December 2024, and January 2024) based on latest BITRE data release.



Source: BITRE for Australian data ([website](#)).
 * Data available up to January 2025 based on latest BITRE data release.

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)

There has been a notable improvement in ATFM outcomes in February, compared to the same period last year. Collaborative network decision-making to optimise Ground Delay Programs remains a cross-industry focus, balancing airborne delays with ground delays. December and January saw an industry focus on minimising ground delays. Increased compliance measures at Perth Airport starting in late February have shown early improvements in reducing demand/capacity imbalances.

Figure 17. Overall Airservices' attributable impacts (February 2025)



Figure 18. GDP application hours, arrival airborne delay, and GDP compliance.

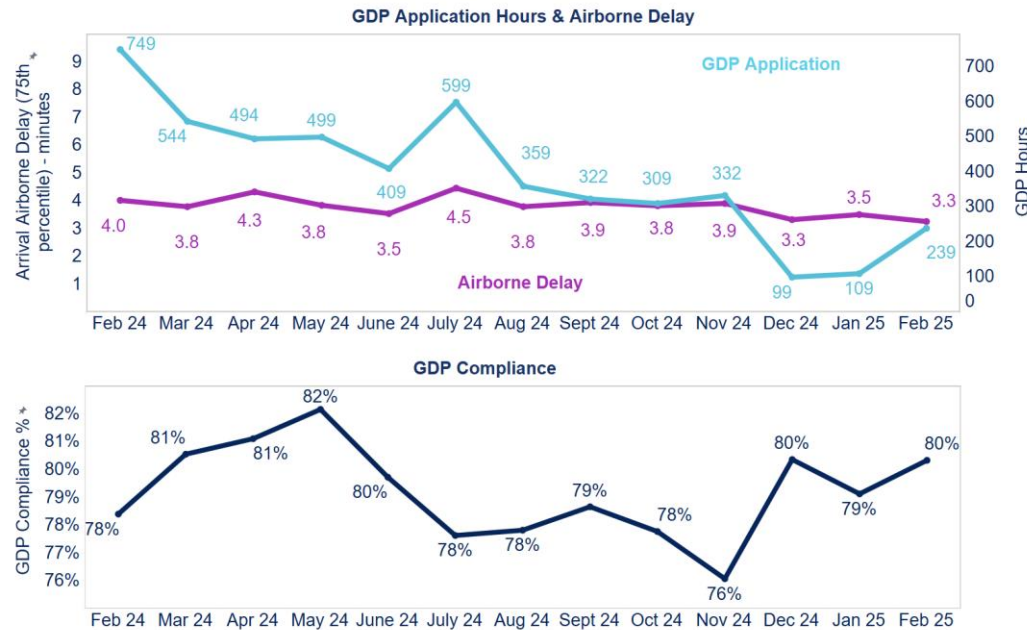
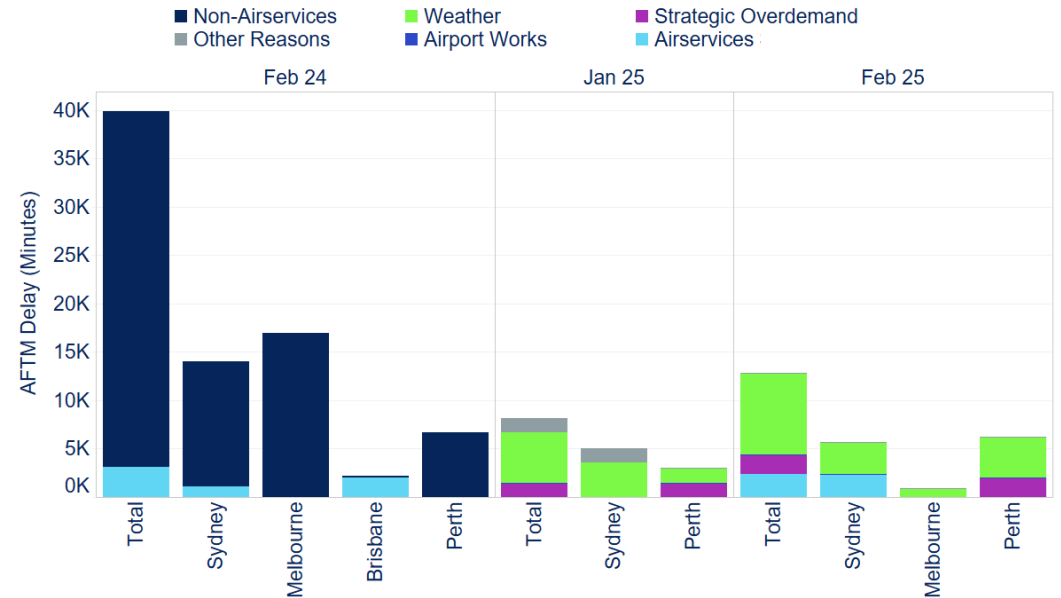


Figure 19. ATFM (GDP) delay by attribution and airport for three reference periods (February 2025, January 2025, and February 2024).



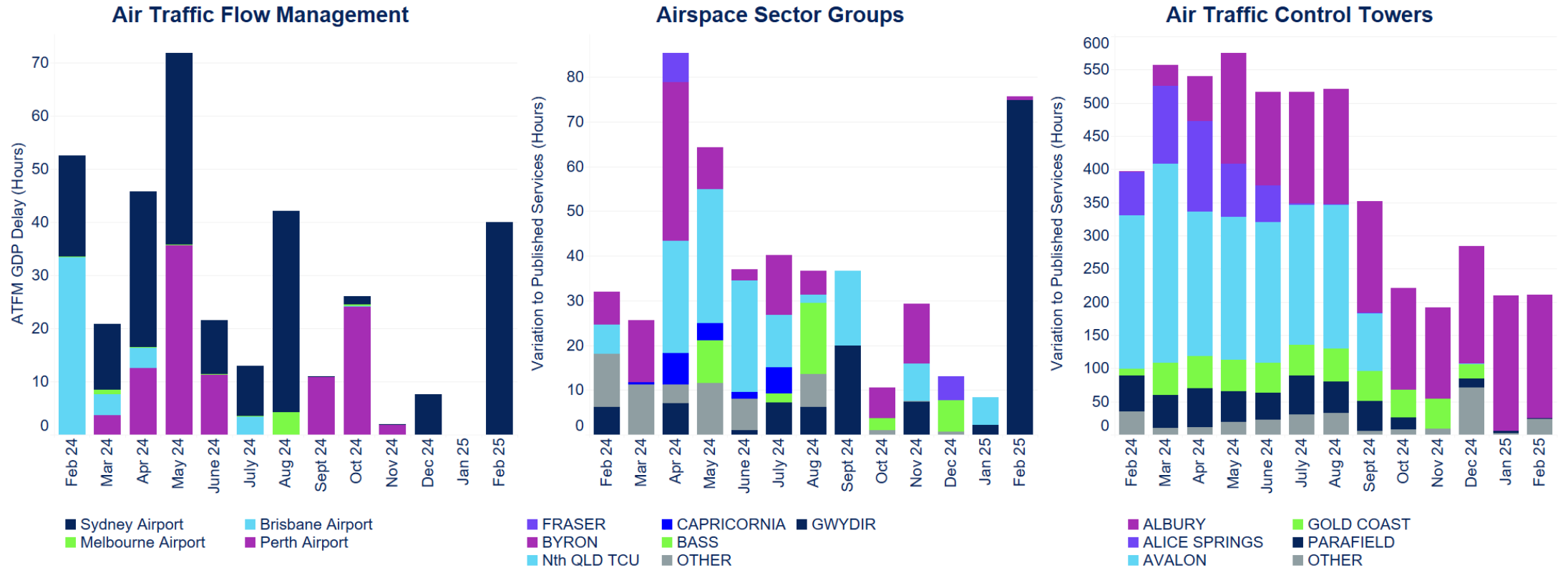
Source: Airservices ODAS. A GDP is an agreed industry plan to balance the demand (based on airline schedules) to the available runway capacity that is collaboratively agreed (refer to [GDP Fact Sheet](#)). GDP compliance represents the proportion of flights into an airport that departed compliant with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

*Includes cancellations made in the Harmony system where a staffing constraint required a GDP. On 14 February 2025 as a result of the associated disruptions, tactical cancellations based on information provided by airlines were also included.

Air Traffic Service Provision

Airservices attributable ground delays and service variations increased in February 2025. This was largely driven by staffing impacts at Sydney tower on 14 February during a weather event, in an airspace volume in northern New South Wales later in the month, and regionally at Albury tower. To minimise the impact from such events, we have put in additional layers of industry communication to better support our customers' operations management. Additionally, we are investing heavily in recruitment, training, and workforce resilience to ensure reliable and flexible resource utilisation and improve service consistency.

Figure 20. 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.

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