airservices australia

Australian Aviation Network Overview

March 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.

Published by Airservices Australia

Contents

Executive Summary

In March, the Australian aviation network saw a 2% decrease in daily average flights compared to the same month last year. This reflects both a seasonal contraction post the summer holiday peak and also the impact of Tropical Cyclone Alfred on operations at various airports in southeast Queensland and northern New South Wales earlier in the month.

Against this backdrop, our industry continues to focus on improving operational reliability, disruption response and resilience. Based on the latest available data, February saw the highest industry on-time performance in the last three years. Compliance with Ground Delay Programs has also improved as a key contributor to network predictability.

For Perth Airport, Airservices has worked closely with operators to manage demand in excess of airport capacity, whereby new measures implemented in late February have resulted in a considerable reduction in ground and airborne delays. We will continue to work closely with industry to ensure a balanced outcome.

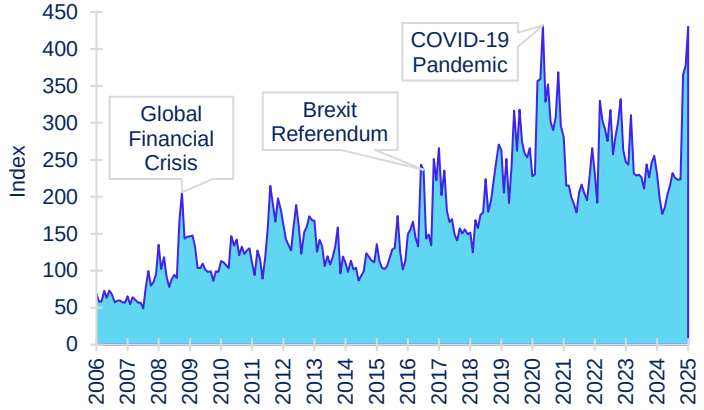
Air traffic service (ATS) availability across airspace and towers was at 99.7% and Aviation Rescue Fire Fighting Services (ARFFS) at 99.9%, with ATS variations mainly attributable to the airspace volume north of Sydney and also Albury Tower. We remain focused on improving resilience across the network in the medium term, while preparing for the Easter period, including maximising the availability of resources and ensuring a reliable and resilient service to industry during peak travel times.

Economic and social trends

Economic factors

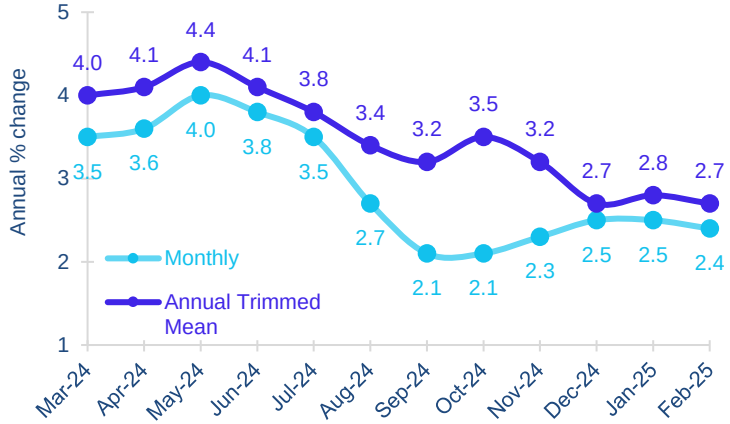
Stabilised inflation and domestic airfares, coupled with rising consumer sentiment, highlight recent positive momentum in the Australian economy. However global geopolitical uncertainty is clouding the economic outlook and poses a risk to the growth of the aviation sector.

Figure 1. Global economic policy uncertainty index.



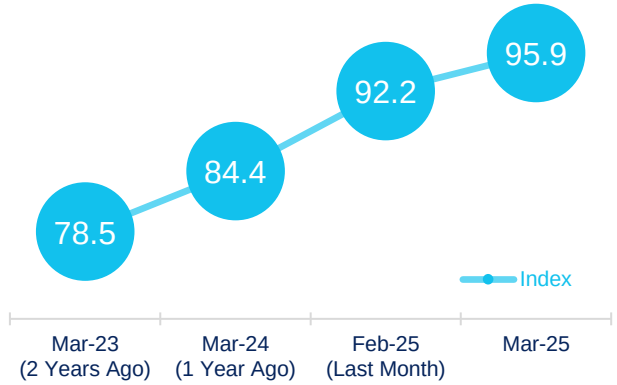
Source: Economic Policy Uncertainty (website) – latest data as at 4/4/2025

Figure 2. Consumer Price Index (CPI) Indicator.



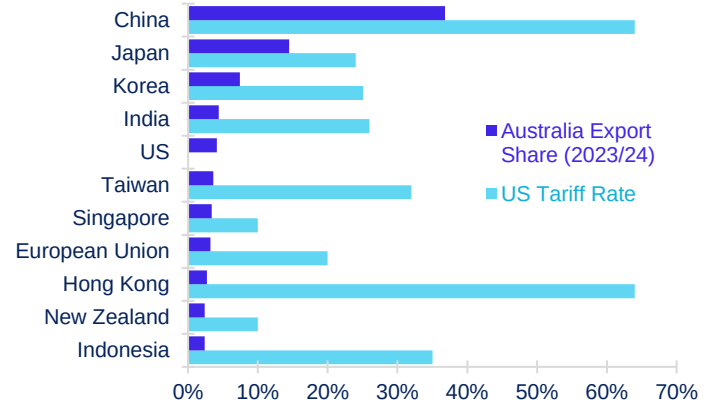
Source: ABS (website) – latest data to February 2025 as at 4/4/2025

Figure 3. Westpac Melbourne Institute Consumer Confidence.



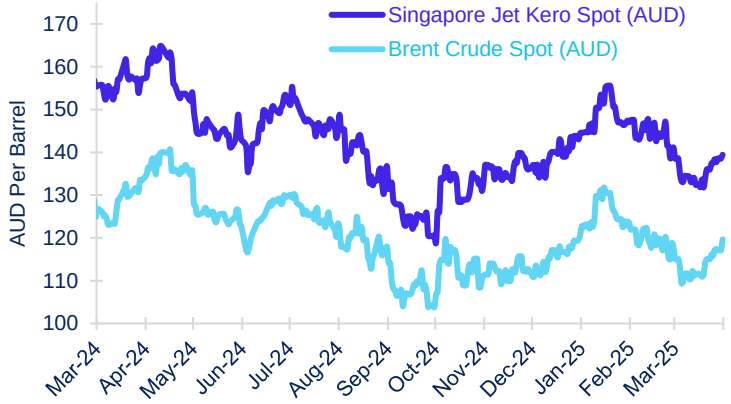
Source: Westpac Economics (website) – latest data as at 4/4/2025

Figure 4. US tariff rates and Australia's key trading partners.



Source: DFAT/CBA/Bloomberg via ABC (website) – latest data as at 4/4/2025

Figure 5. Jet fuel and Brent crude oil prices daily.



Source: Bloomberg – latest data as at 3/4/2025

Figure 6. Domestic airfares (real best discount).

Source: BITRE (website) – latest data as at 4/4/2025

Social factors

Airservices is committed to delivering our Environment and Sustainability Strategy and working with the Australian Government to manage and minimise the impacts of aircraft noise. As part of this we are supporting the use of Simultaneous Opposite Direction Parallel Runway Operations (SODPROPS) at Brisbane Airport, trialling predictable sequencing for Melbourne, Sydney and Perth, and providing the community with tools, reporting and information on aircraft operations and noise.

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

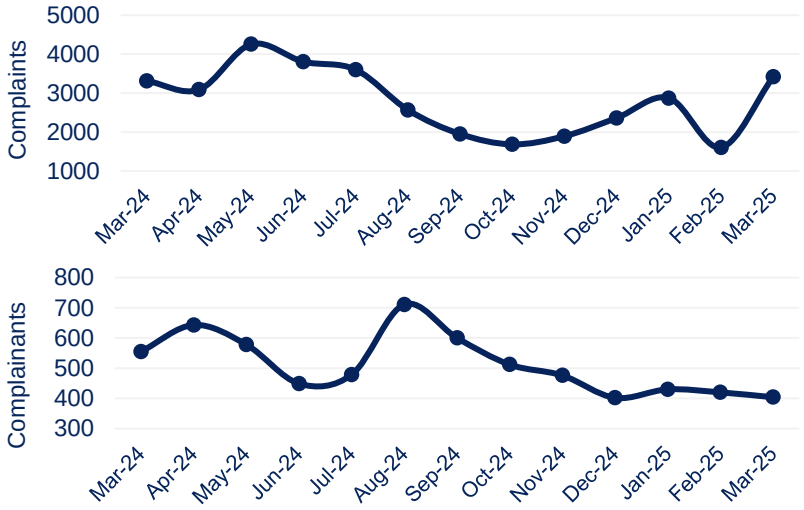


Figure 9. CO_2 emissions savings from optimised User Preferred Routes (UPR) per month.

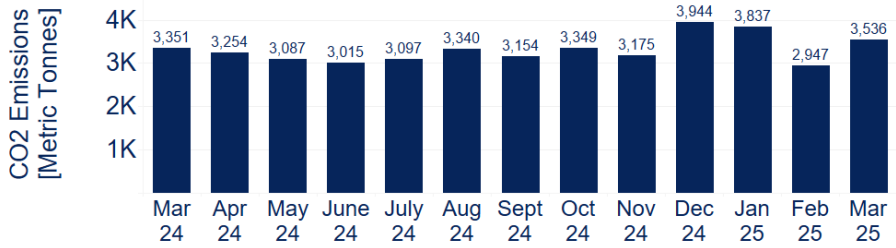
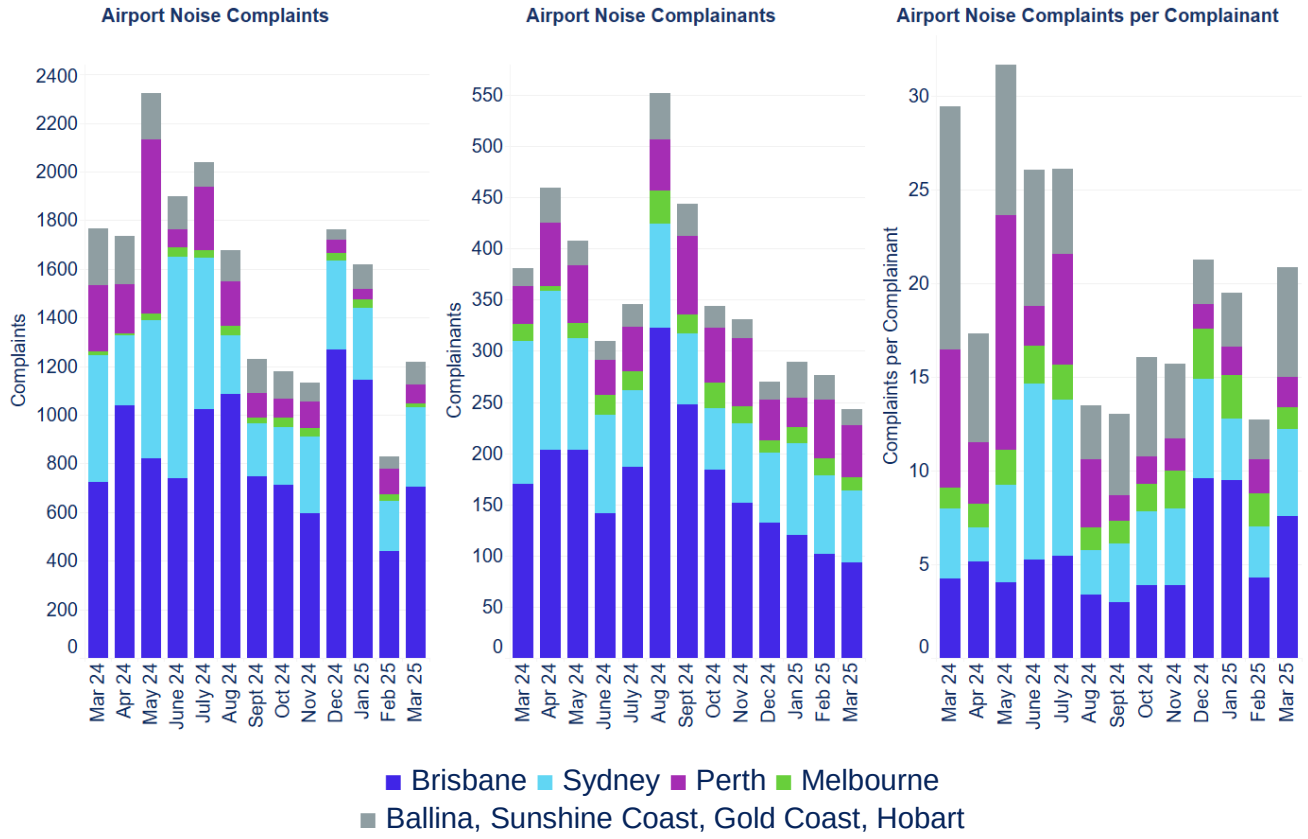


Figure 8. Aircraft noise complaints, complainants, and complaints by complainant per month at key locations.



Source: Airservices Noise Complaints and Information Service (NCIS) and Airservices ODAS. CO emissions savings from UPR are across oceanic and cross-continental airspace.

Australian aviation and regional context

State of Australian aviation growth

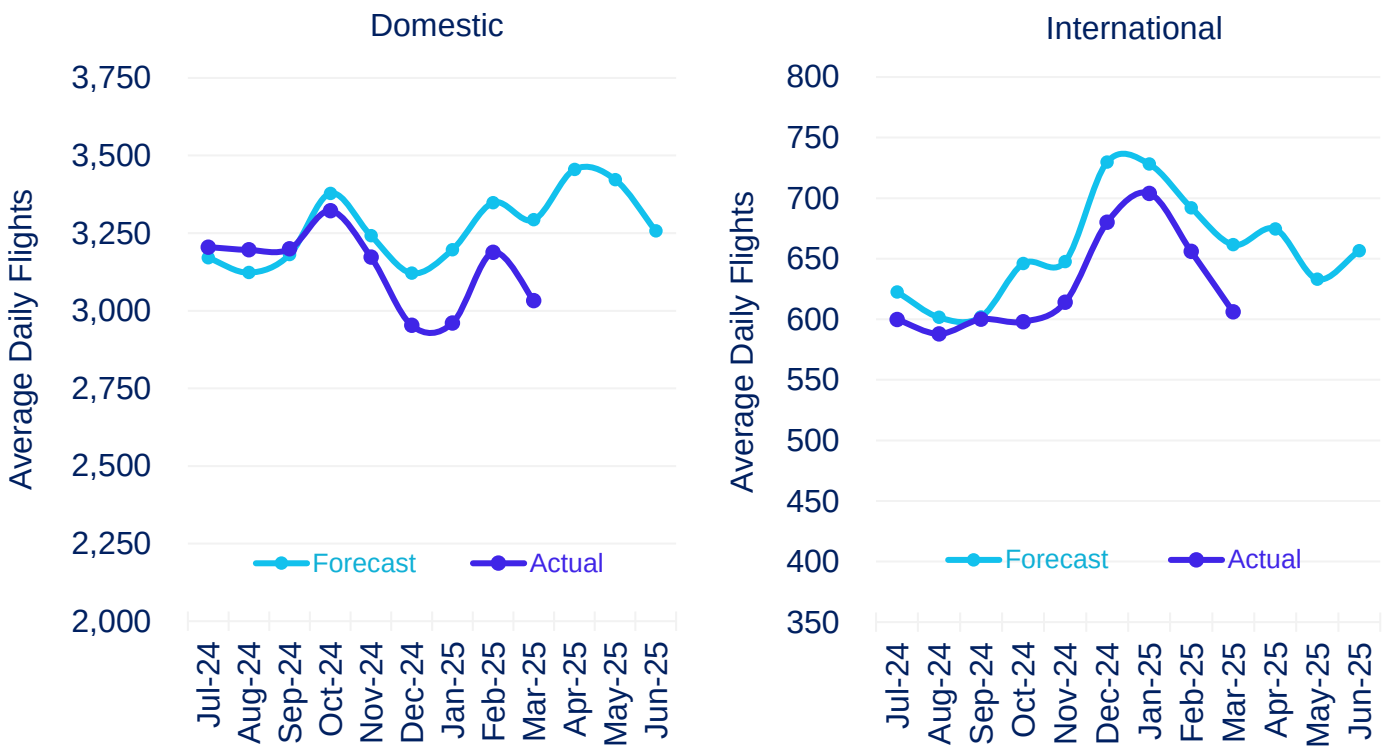
In March, the Australian aviation network contracted by 5% from the previous month and was 2% lower than last year in terms of average daily flights. This reflects the seasonal pattern following the peak summer period, along with the disruptions due to Tropical Cyclone Alfred. Major events such as Grand Prix and the Australian International Airshow at Avalon drove demand at Melbourne Airport.

Figure 10. Network growth for March 2025 against two reference periods (left) and actual flights compared to Airservices' forecast per month.

Network Growth

Total	Domestic	International
3,638 Average Daily Flights	**3,032** Average Daily Flights	**606** Average Daily Flights
-2% vs Last Year	**-3%** vs Last Year	**+1%** vs Last Year
-5% vs Last Month	**-5%** vs Last Month	**-8%** vs Last Month

Forecast vs Actual Flights

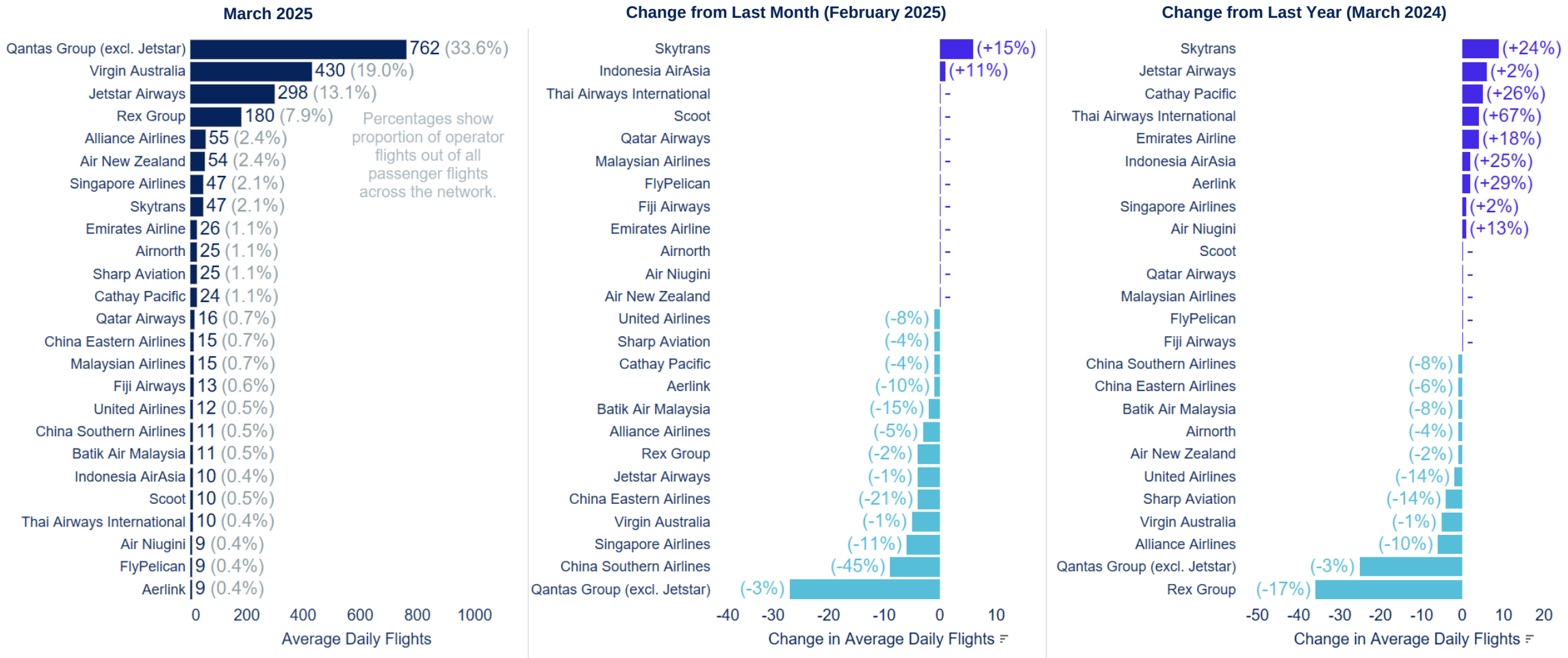


Source: Airservices aeronautical charge database. Excludes some general aviation flights that are not subject to Airservices aeronautical charges. Airservices' forecast proposed as of July 2024 and is subject to review by ACCC.

Top aircraft operators

The end of summer saw a seasonal reduction in flights across many domestic and international carriers. Carriers operating flights to Australia out of major hubs such as Hong Kong and those in Southeast Asia and the Middle East continue to experience year-on-year growth.

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

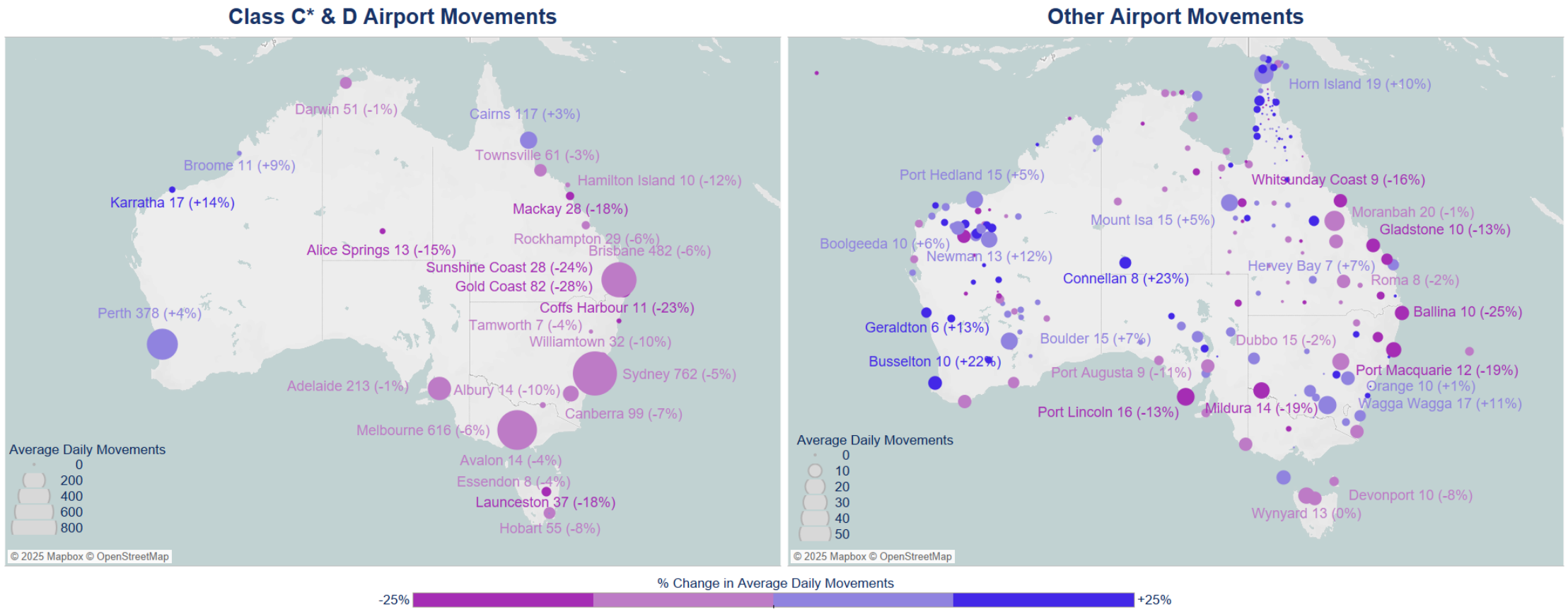


Source: Airservices ODAS (includes airline flights only). Only top 25 airlines by flights are shown.

Domestic network

In early March, Tropical Cyclone Alfred impacted operations across the southeast Queensland and northern New South Wales regions. Our collective efforts focussed on safe and timely resumption of normal aviation services, with industry efforts now underway to support demand growth at affected areas. Other regions such as Northern Queensland, Western Australia, and parts of regional New South Wales have continued to experience traffic growth.

Figure 12. Airline average daily movements at airports (March 2024, and year on year change).



Source: Airservices ODAS (includes airline movements only). International flights are included. Metropolitan Class D airports are in 'Other'.
*Class C includes military/joint-user airports (Darwin, Townsville, and Williamtown).

International markets

Most international markets have contracted considerably following the peak December-February holiday season. This indicates that year-on-year growth is heavily driven by leisure demand, while growth in business travel remains slow. We are seeing some state government efforts to stimulate demand in low season shoulder periods.

Figure 13. International markets traffic share in March 2024 and March 2025

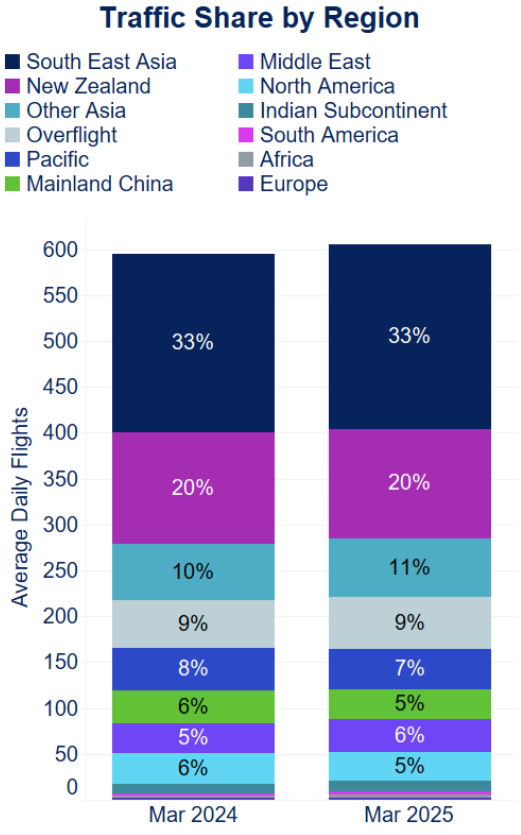


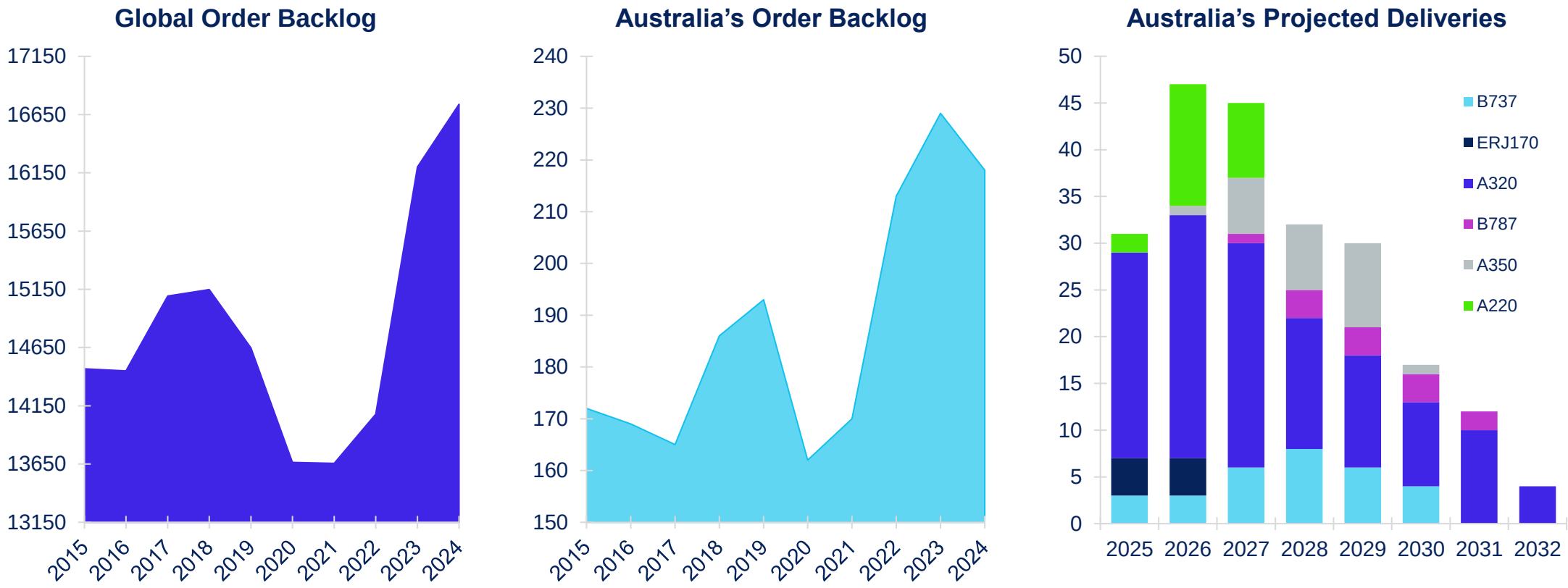
Figure 14. Average daily flights by international markets per month.

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

Australian fleet

Over the past decade, the global aircraft order backlog has increased to its highest levels, highlighting both strong demand and continued challenges in aircraft manufacturing and supply chain. In Australia, the backlog is reducing gradually. In this context, airline load factors will remain high in the near term, emphasising the critical importance of operational reliability and resilience.

Figure 15. Global passenger aircraft order backlog (left) and for Australia (middle) and Australia's projected deliveries (right).



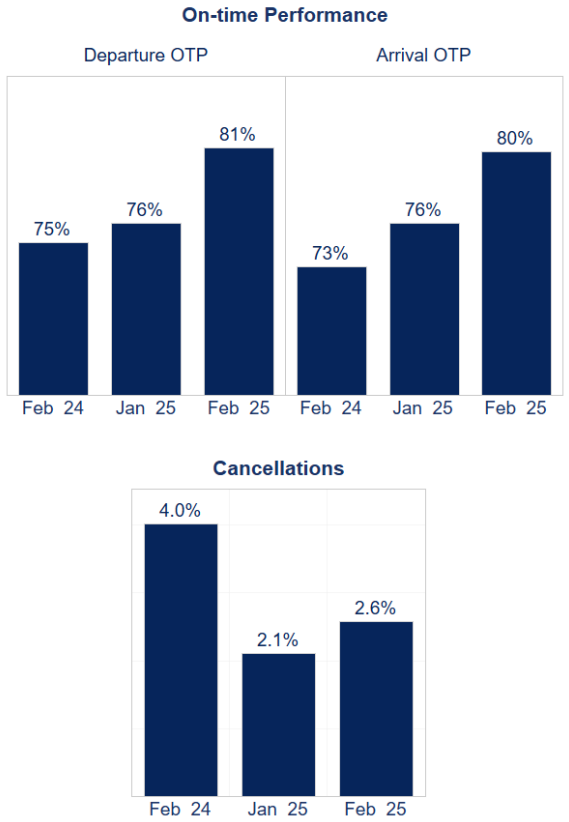
Source: Centre for Aviation Fleet (CAPA) data, as of 8 April 2025. Deliveries include new build aircraft with at least 20 seats.

Australian aviation network performance

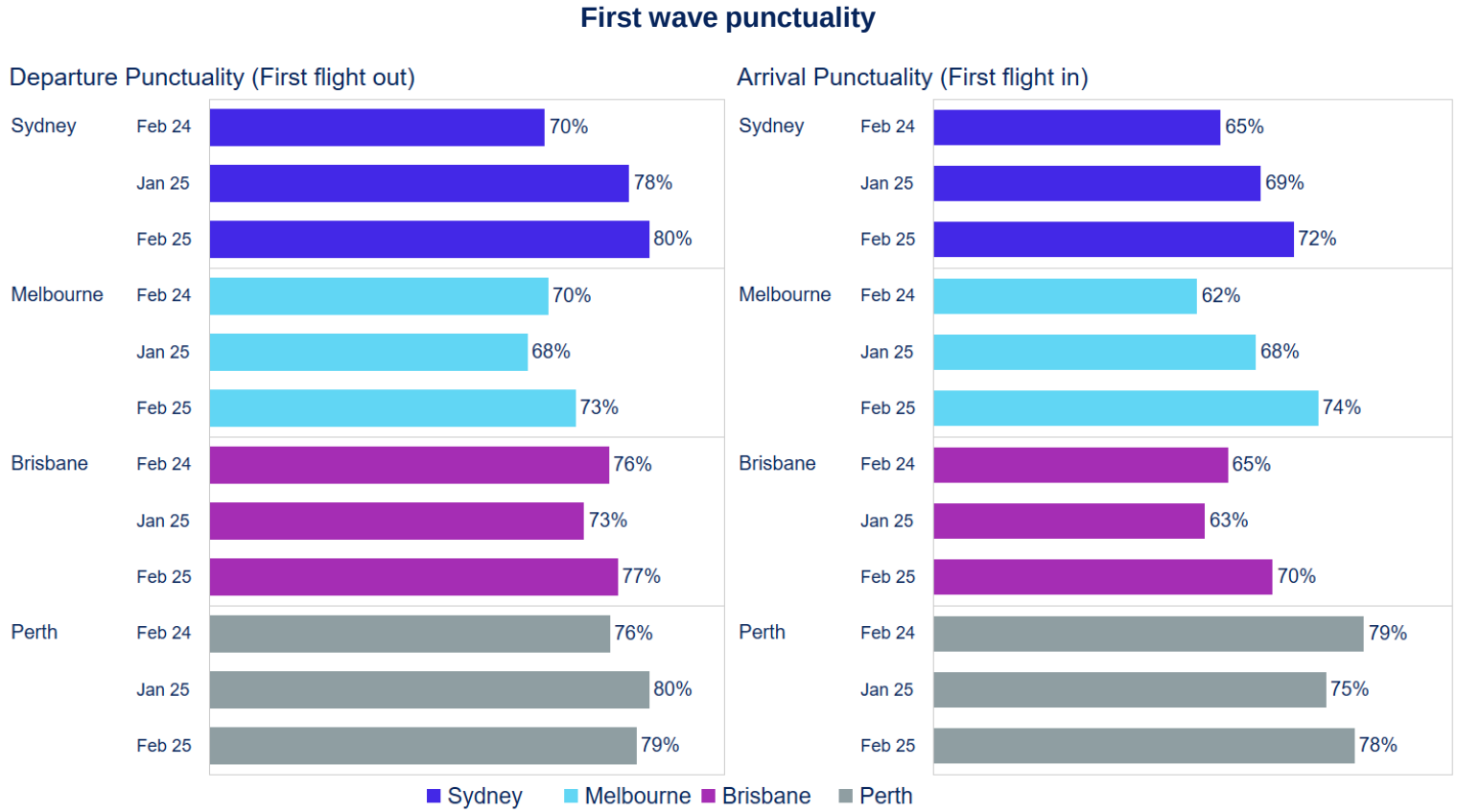
Industry OTP and first wave performance

February saw a continued improvement in industry on-time performance, reaching the highest level in the last three years. This reflects the aviation sector's collective focus on network planning and decision-making, as well as operational reliability, such as with effective aircraft and crew resource management and efficient ground handling.

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



Source: BITRE for Australian data (website). Data available up to February 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)

March 2025 saw an increase in application of Ground Delay Programs (GDPs) to 366 hours. This was largely driven by the introduction of the new slot compliance measures at Perth Airport, including routine GDPs Monday to Friday. Nationally, both ground delays and airborne delays remained steady. GDP compliance reached the highest levels in the past 40 months through a shared industry commitment to enhance network predictability.

Figure 17. GDP application hours, arrival airborne delay, and GDP compliance.

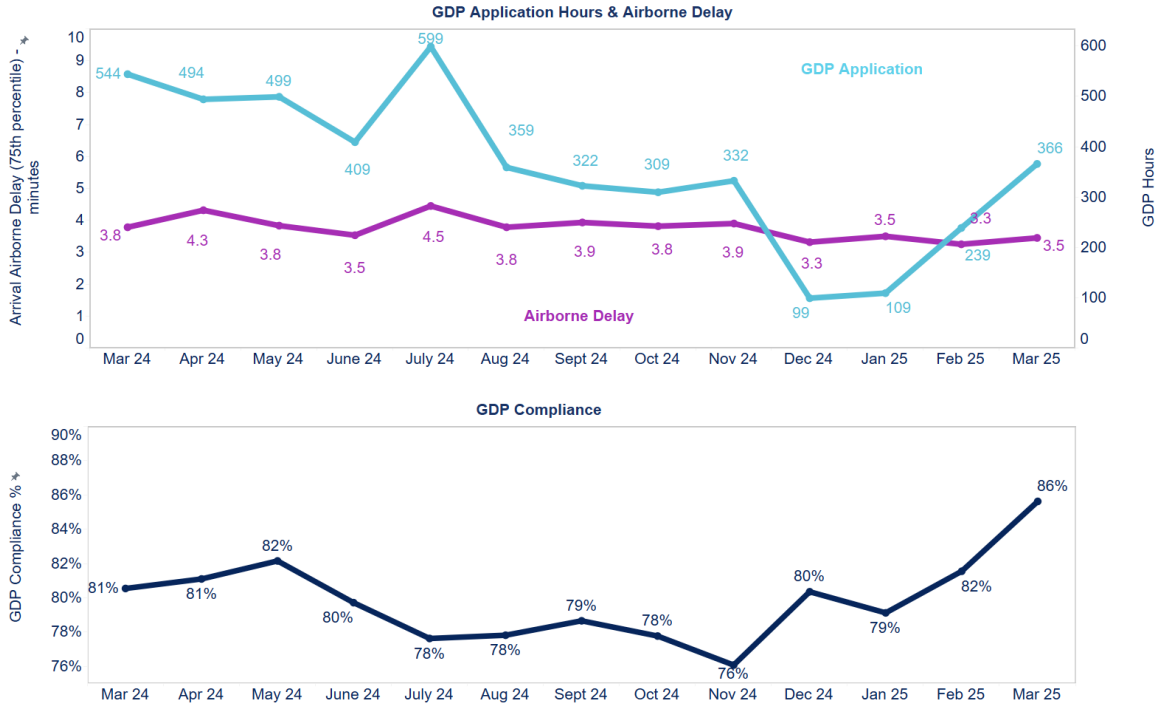
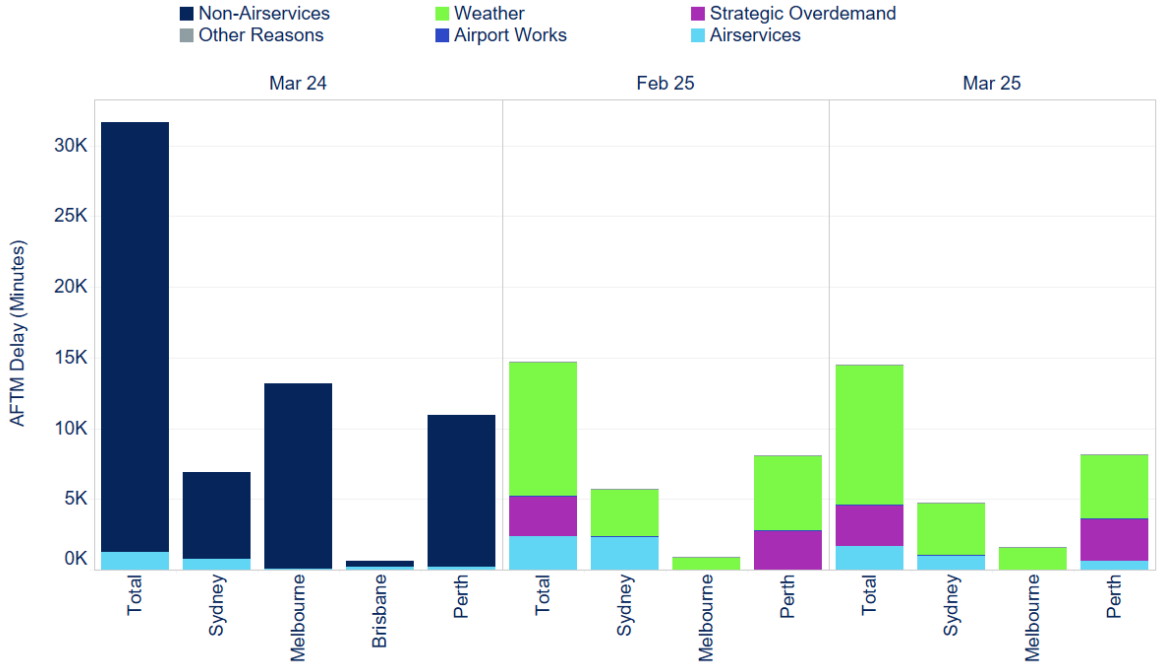


Figure 18. ATFM (GDP) delay by attribution and airport for three reference periods (March 2025, February 2025, and March 2024).

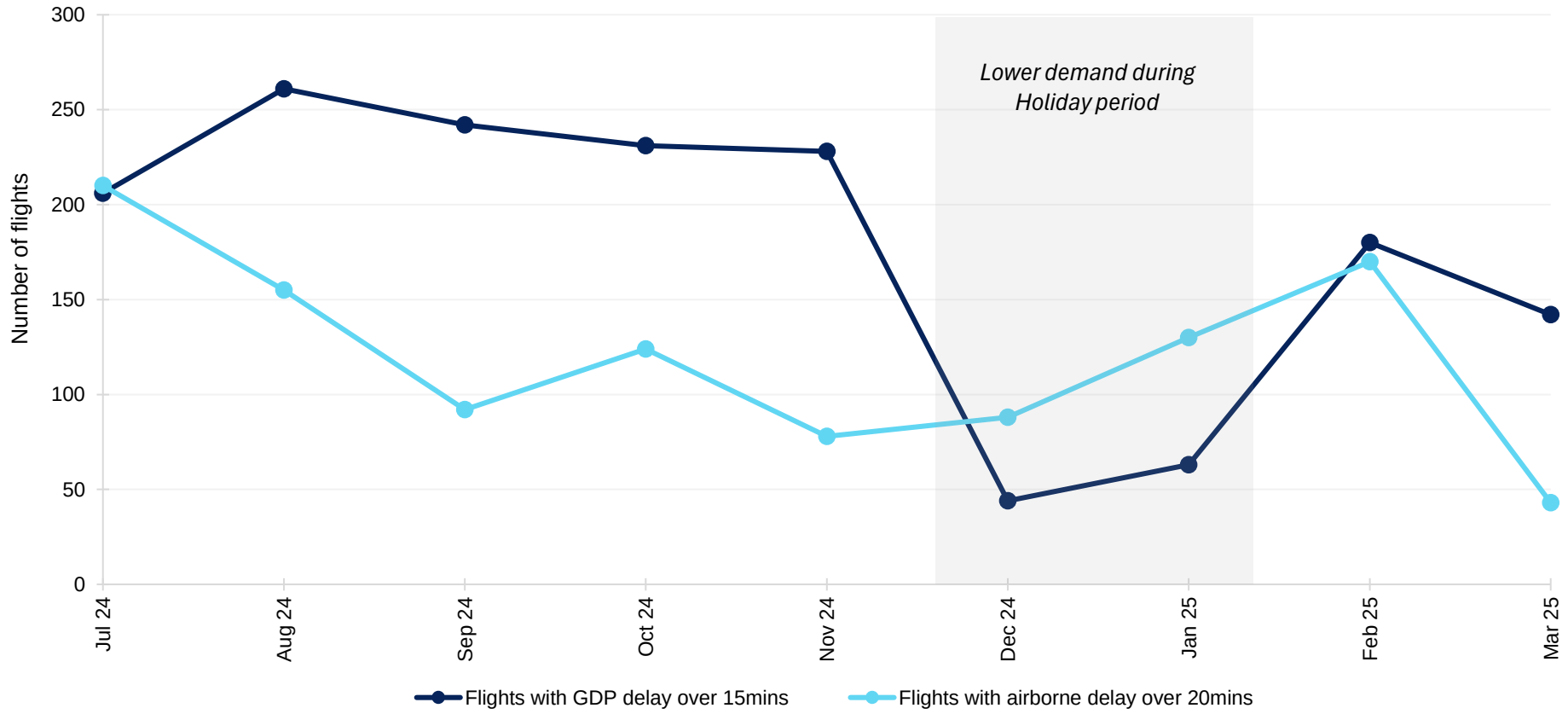


Source: Airservices ODAS. A GDP is an agreed industry plan to balance the demand (based on airline schedules) to the available runway capacity that is collaboratively agreed (refer to GDP Fact Sheet). GDP compliance represents the proportion of flights into an airport that departed compliant with their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

Perth Network Performance Improvement

Domestic flights at Perth Airport have grown 35% since 2019 while arrival punctuality dropped from 73% in 2019 to 60% in 2024, largely due to demand in excess of capacity in peak periods. Airservices worked together with various industry stakeholders to introduce new measures in late February 2025 aimed at improving compliance with airport slots, which has resulted in a notable reduction in airborne and ground delays. We will continue to closely work with industry to ensure a balanced outcome.

Figure 19. Number of flights into Perth per month with GDP delay over 15 mins and airborne delays over 20 mins for Financial Year 2025 to date. December 2025 and January 2025 had lower delays due to reduced demand during the holiday period.



Source: Airservices ODAS.

Air Traffic Service Provision

In March, 32% of service variations were attributed to the impacts of Tropical Cyclone Alfred on Brisbane Air Traffic Services staff availability during the extreme weather event. Through coordinated planning and crisis response efforts with stakeholders, normal services were promptly returned to aid recovery while ensuring the safety of our frontline teams and the travelling public. Although the overall air traffic service outcome improved from February, building service resilience in critical network locations and regional aerodromes remains our priority.

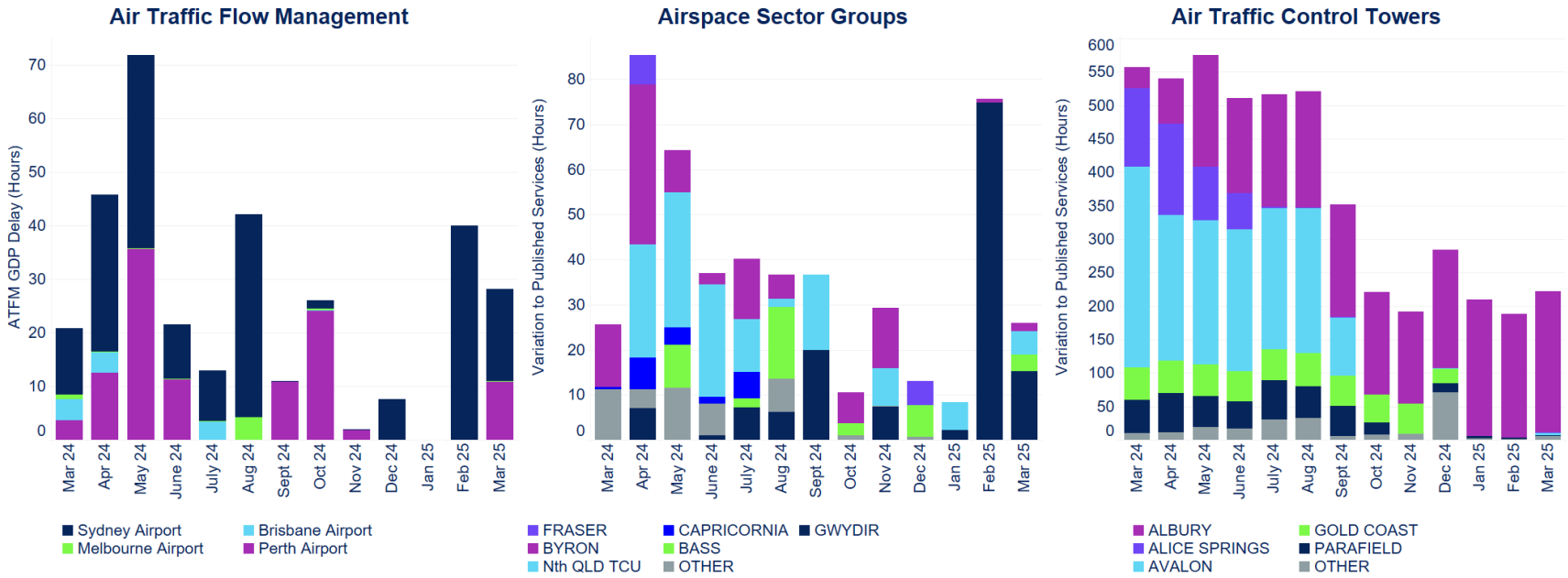
Figure 20. Overall Airservices' attributable impacts (March 2025)

Flights Impacted*	Service Variations
1.2%	42%
ATFM (GDP) Delays	**Total Network Delays**
12.5%	0.2%

Arrival Cancellations

5

Figure 21. 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.

* Excludes general aviation.

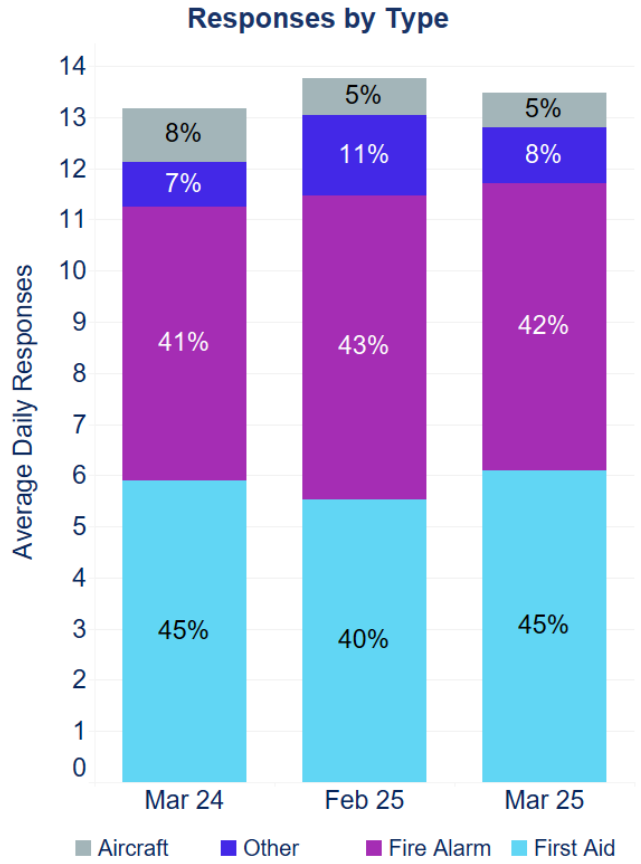
Aviation Rescue Fire Fighting Service (ARFFS)

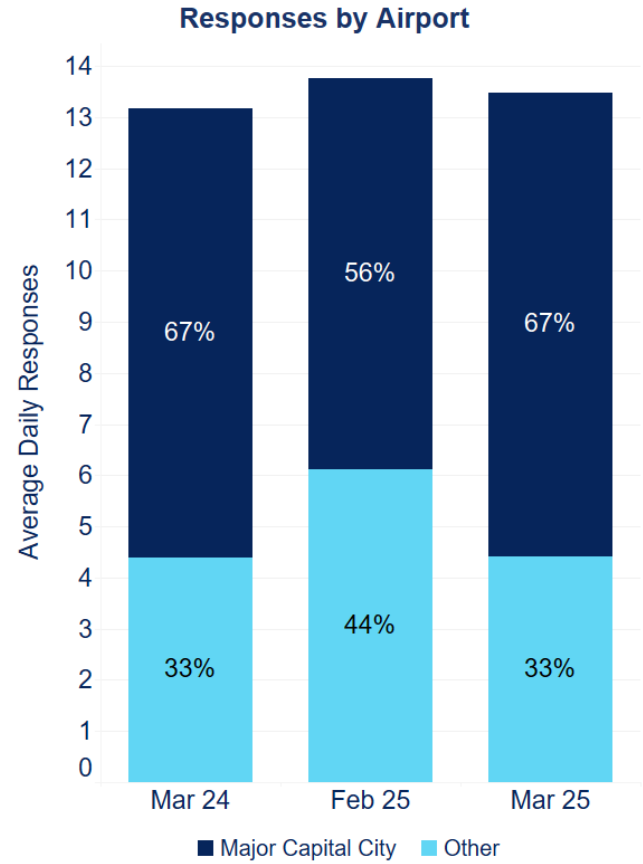
In March, Aviation Rescue Fire Fighting Services (ARFFS) handled 418 emergency calls across 27 airports, including a rescue operation at the Australian International Airshow where Avalon ARFFS responded rapidly to the scene and coordinated with other emergency units to provide assistance. Across all locations, we remain committed to ensuring consistent coverage of these essential services to aircraft and airports.

Figure 22. ARFFS service delivery by airport and total (left) emergency responses by type (middle) and by airport category (right) for three reference periods.

Service Delivery

	Mar 24	Feb 25	Mar 25
Sydney	99.9%	100.0%	100.0%
Melbourne	100.0%	100.0%	100.0%
Brisbane	99.9%	100.0%	100.0%
Perth	100.0%	100.0%	100.0%
Adelaide	99.9%	100.0%	100.0%
Cairns	82.5%	99.9%	100.0%
Canberra	99.9%	100.0%	100.0%
Gold Coast	100.0%	100.0%	100.0%
Darwin	100.0%	100.0%	100.0%
Townsville	99.8%	99.9%	100.0%
Hobart	92.4%	99.7%	99.7%
Launceston	99.5%	100.0%	100.0%
Sunshine Coast	99.3%	100.0%	100.0%
Mackay	100.0%	100.0%	100.0%
Rockhampton	99.9%	100.0%	100.0%
Karratha	93.2%	100.0%	98.6%
Alice Springs	100.0%	100.0%	100.0%
Avalon	100.0%	100.0%	100.0%
Coffs Harbour	100.0%	100.0%	100.0%
Port Hedland	100.0%	98.4%	100.0%
Broome	100.0%	98.4%	98.0%
Ballina	97.7%	100.0%	100.0%
Newman	100.0%	100.0%	100.0%
Gladstone	94.4%	94.3%	82.3%
Hamilton Island	93.5%	100.0%	98.0%
Proserpine	86.6%	99.6%	99.6%
Ayers Rock	100.0%	100.0%	100.0%
All Airports	99.0%	100.0%	99.9%





Source: Airservices ODAS and ARFFS TRAX. Service delivery is based on flights that received ARFFS coverage as published.
Major capital city airports are Sydney, Melbourne, Brisbane, and Perth.

For more information:

stakeholder@airservicesaustralia.com