



# Australian Aviation Network Overview

April 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

© Airservices Australia 2025

This work is copyright. Apart from any use as permitted under the Copyright Act 1968, no part may be reproduced by any process without prior written permission from Airservices Australia.

# Contents

<b>1</b>	Executive Summary	3
<b>2</b>	Economic and social trends	4-6
<b>3</b>	Australian aviation and regional context	7-12
<b>4</b>	Australian aviation network performance	13-18

# Executive Summary

In April, the Australian aviation network experienced a 6% increase in daily average flights from the previous month, reflecting seasonal fluctuations, and maintained consistent traffic levels with last year. International traffic saw an increase of 6% compared to April 2024. This indicates Australia's growing appeal for tourism and trade in the current global landscape.

Notably, 17 April 2025 marked the busiest day for passenger flights in the last five years. Two of the four busiest Australian airports that drive the network performance have exceeded 2019 traffic levels, with airlines reporting unprecedented load factors as demand continues to grow.

The industry has also achieved two consecutive months of highest on-time performance in three years, despite disruptions from ex-Tropical Cyclone Alfred. This progress underscores the collective focus on key network performance factors, including weather disruption management, engineering and operational spares, staffing and aircraft availability. Compliance with Ground Delay Programs (GDP) has reached the highest levels across all airports in recent months, enhancing network predictability.

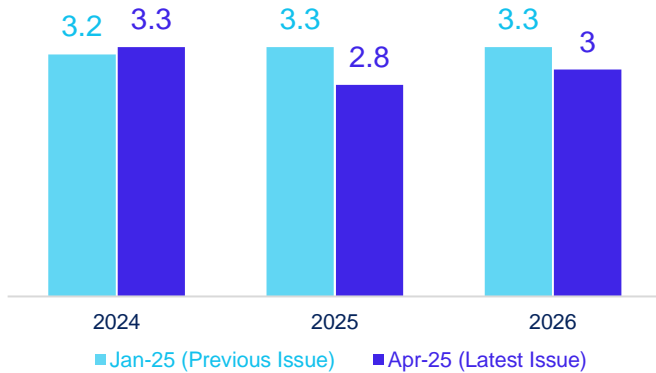
Our service performance continues to improve, with no airspace service variations over the Easter and Anzac Day holiday period. This is the result of embedding layers of resilience measures to protect peak travel demand periods. The application of GDP has remained minimal, only when demand remained high while airborne delays were kept at steady low levels. We are progressing our largest recruitment program in Airservices history, having endorsed 21 additional controllers in Quarter 1, following 52 last year. Ensuring high-standard services to foster regional aviation remains a key focus, and we are exploring all necessary measures to enhance recruitment, resource deployment and training processes.

# Economic and social trends

# Economic factors

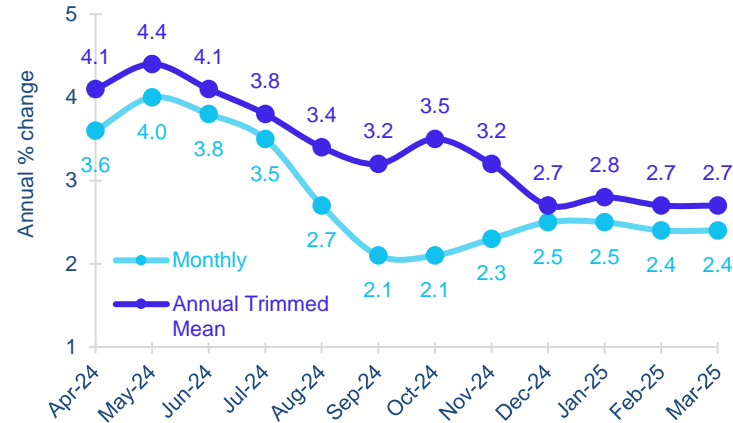
The global economic outlook shifted rapidly in this reporting period due to global trade and policy uncertainties, posing risks to the growth of the aviation sector. On the other hand, Australian tourism, trade and aviation may benefit from our stable political environment and strategic position in the Asia Pacific region.

Figure 1. Global economy growth projection (real GDP growth, percent change).



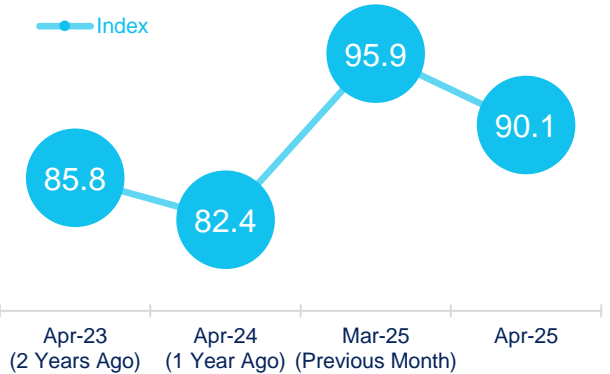
Source: IMF ([website](#)) – latest data as at 1/5/2025

Figure 2. Consumer Price Index (CPI) Indicator.



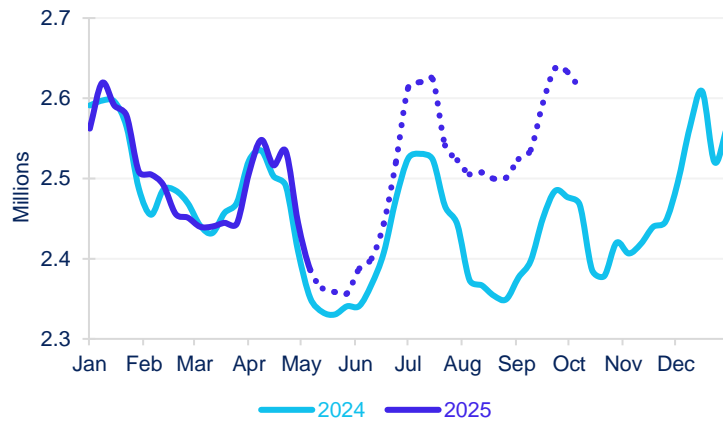
Source: ABS ([website](#)) – latest data to March 2025 as at 1/5/2025

Figure 3. Westpac Melbourne Institute Consumer Confidence.



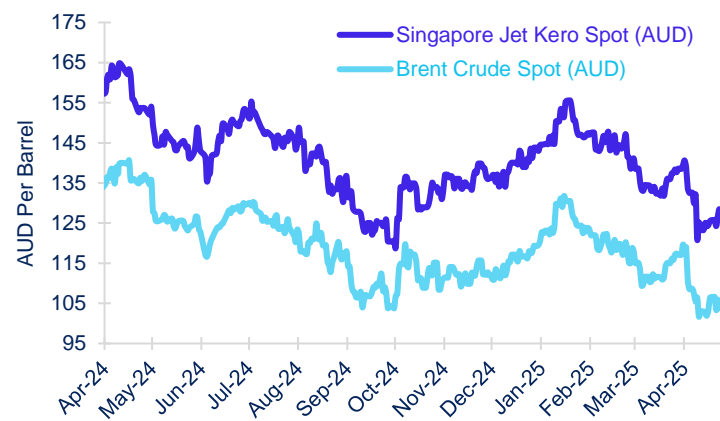
Source: Westpac Economics ([website](#)) – latest data as at 1/5/2025

Figure 4. Australia weekly seats available.



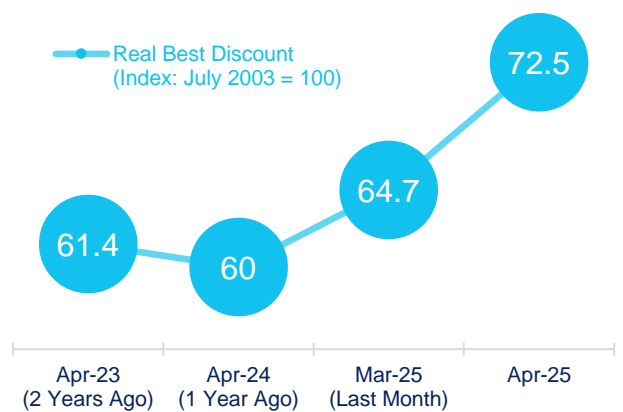
Source: CAPA – latest data as at 1/5/2025. Predictive values from 28 April 2025.

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



Source: Bloomberg – latest data as at 1/5/2025

Figure 6. Domestic airfares (real best discount).



Source: BITRE ([website](#)) – latest data as at 1/5/2025

# Social factors

In April, there was a 25% decrease in the number of individuals lodging aircraft noise complaints compared to the previous year. However, the volume of noise complaints increased by 45% due to repeated complaints from the same individuals, particularly at Brisbane and Sydney. We continue to work with airports and aircraft operators to balance community, environmental, and operational needs. This includes increasing Simultaneous Opposite Direction Parallel Runway Operations and optimising noise abatement procedures.

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

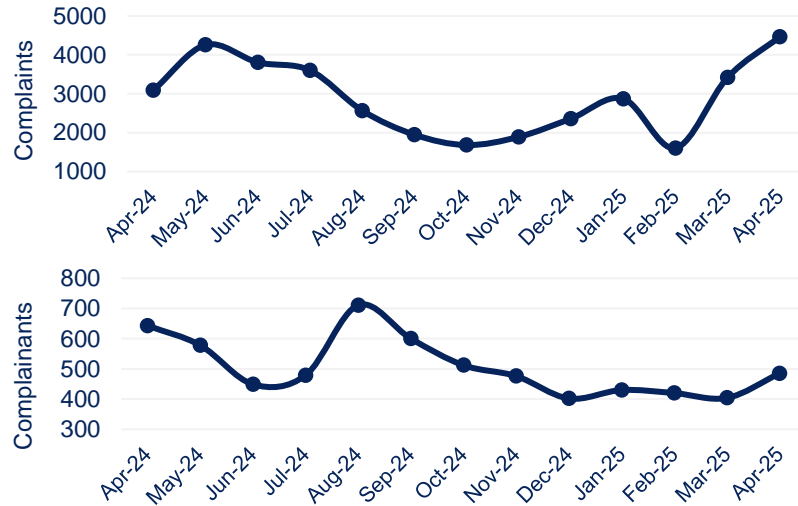


Figure 8. Aircraft noise complaints, complainers, and complaints by complainant per month at key locations.

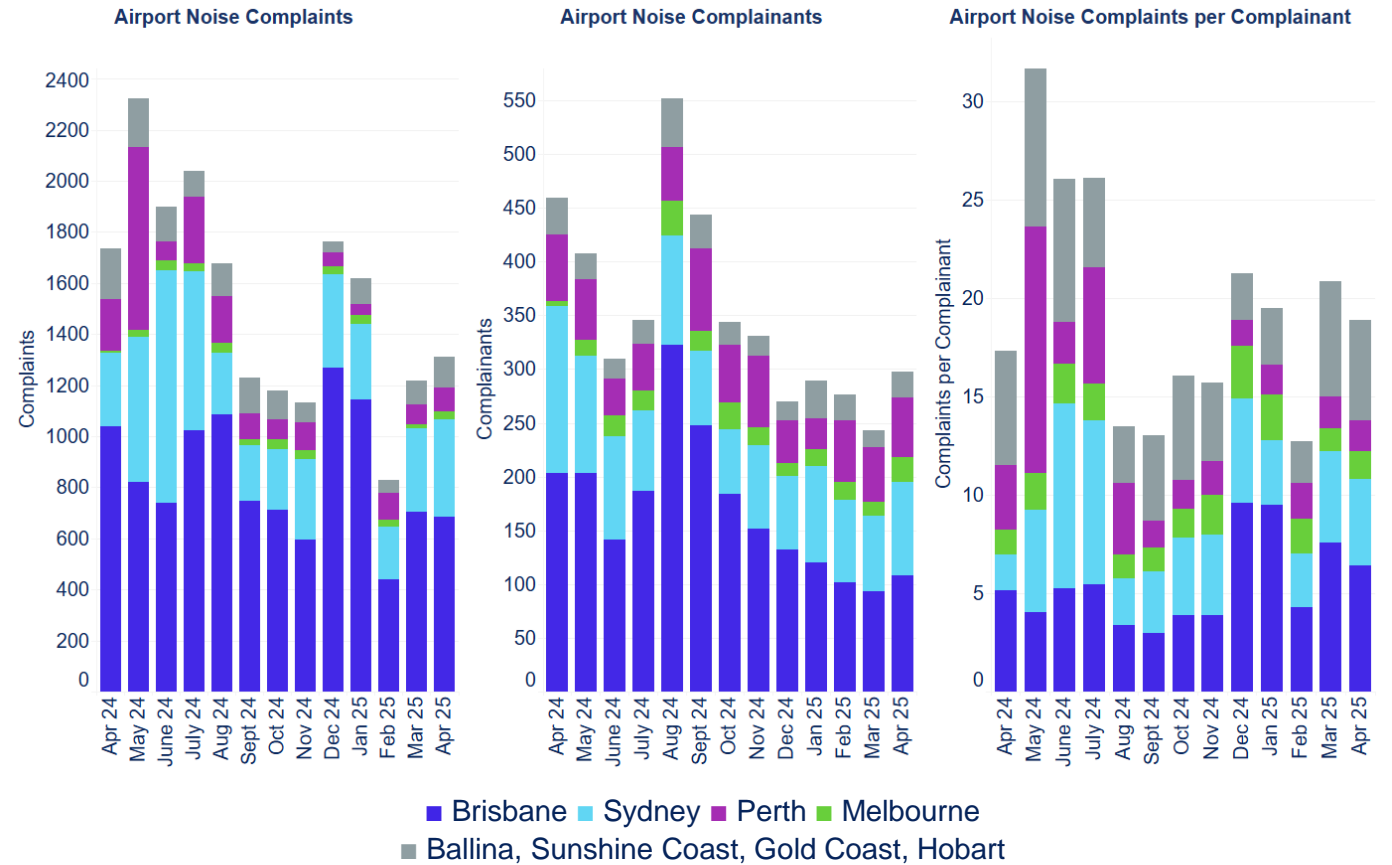
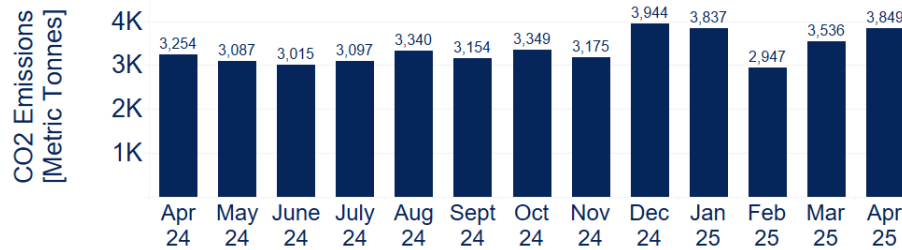


Figure 9. CO<sub>2</sub> emissions savings from optimised User Preferred Routes (UPR) per month.



Source: Airservices Noise Complaints and Information Service (NCIS) and Airservices ODAS. CO<sub>2</sub> emissions savings from UPR are across oceanic and cross-continental airspace.

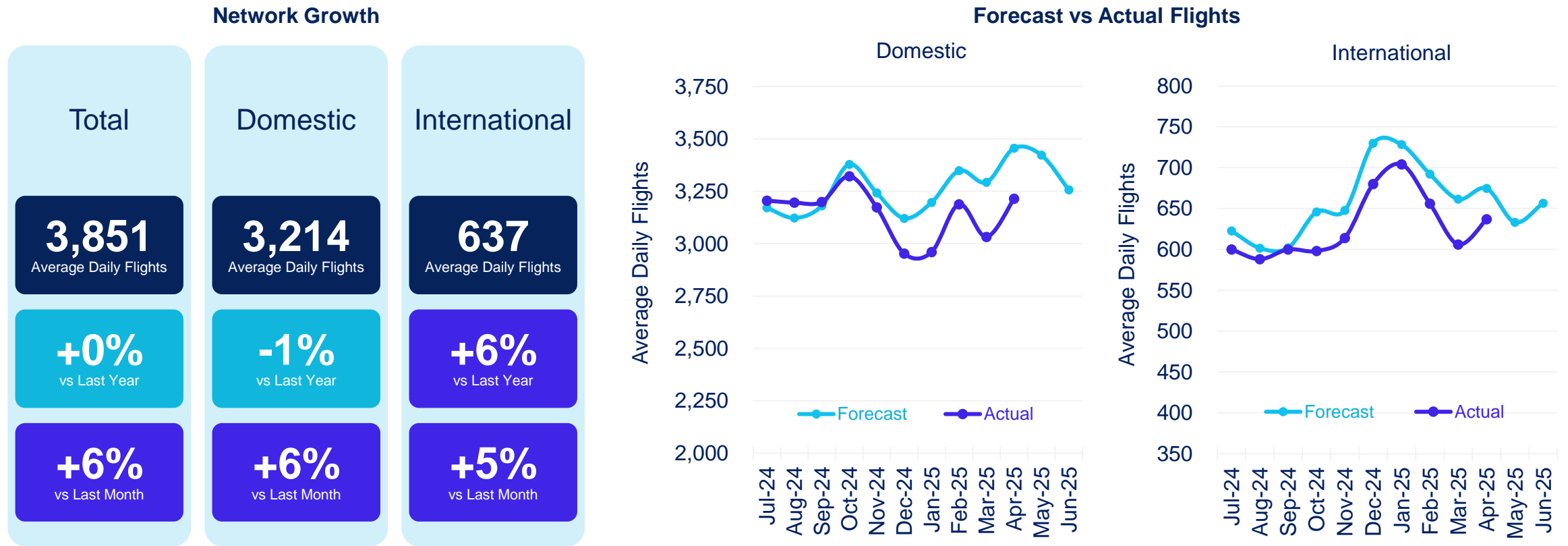


# Australian aviation and regional context

# State of Australian aviation growth

In April, the Australian aviation network saw a 6% increase from the previous month, maintaining consistent traffic levels with last year. International traffic recorded a strong uptick compared to April last year, indicating Australia's attractiveness for tourism and trade in the current global landscape, and Australian's continued appetite for international travel.

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



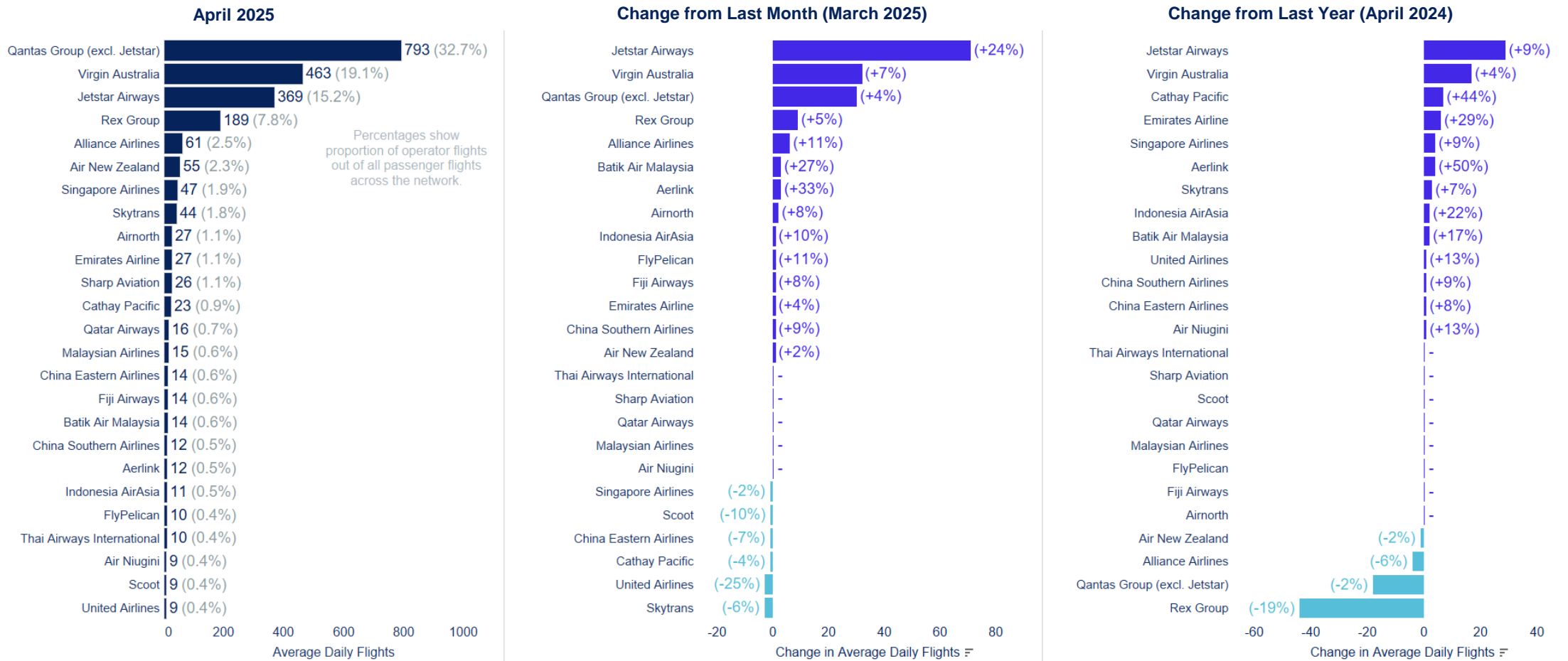
Source: Airservices aeronautical charge database. Excludes some general aviation flights that are not subject to Airservices aeronautical charges. Airservices' forecast proposed as of July 2024.



# Top aircraft operators

Recent growth has been concentrated in domestic low-cost operators and those servicing the neighbouring Asia Pacific tourism markets. This trend indicates travellers' preference for affordable travel options and regional destinations in an environment with cost-of-living challenges and geopolitical uncertainties.

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

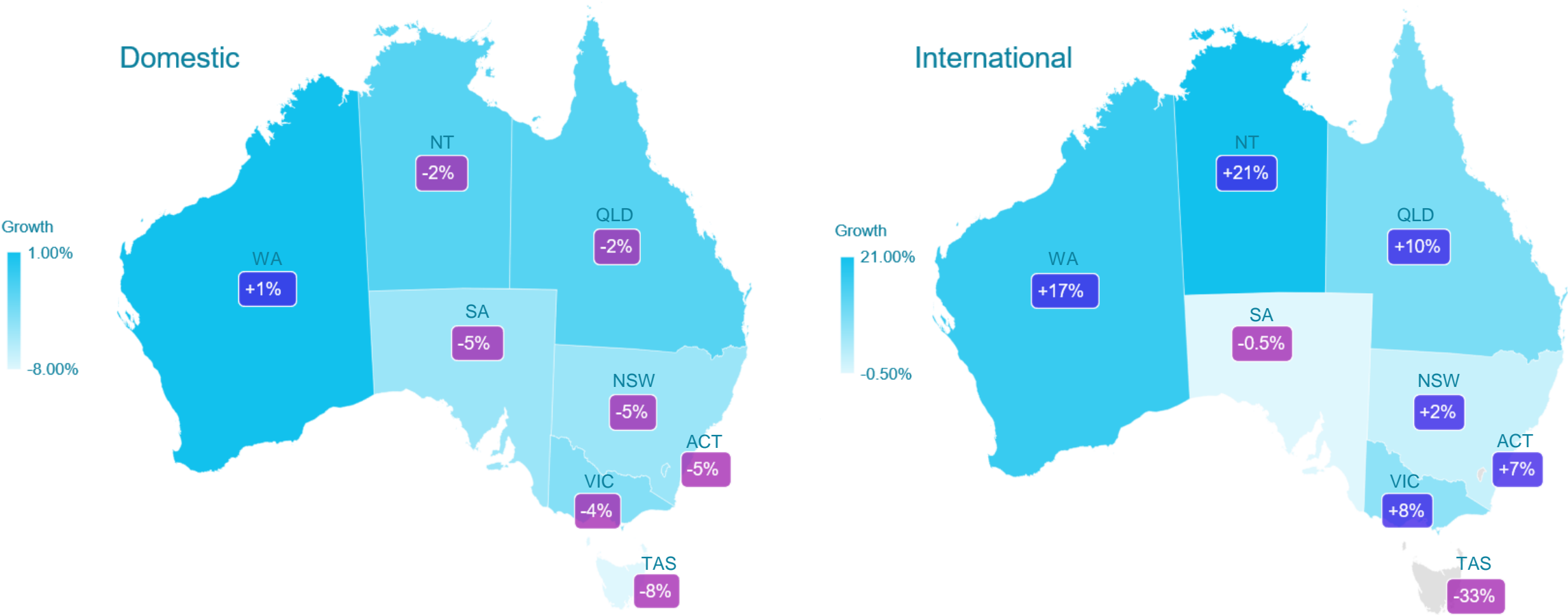


Source: Airservices ODAS (includes airline flights only). Only top 25 airlines by flights are shown.

# Domestic passenger flight network

We are seeing varied growth rates in both domestic and international passenger flights across Australia. State governments are implementing strategies to attract visitors and boost demand, while significant investments in airport infrastructure are underway to ensure future capacity and performance.

Figure 12. Domestic and international passenger flight movements growth by state (April 2025, year on year change).



Source: Airservices ODAS (includes airline movements only).

# International markets

Most key markets for Australian aviation have experienced year-on-year growth. However, the North American market has declined significantly since January, reflecting negative travel sentiments amidst geopolitical uncertainties. The growth from the Middle East indicates a strategic shift by some international airlines to capture the expanding Australian travel market.

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

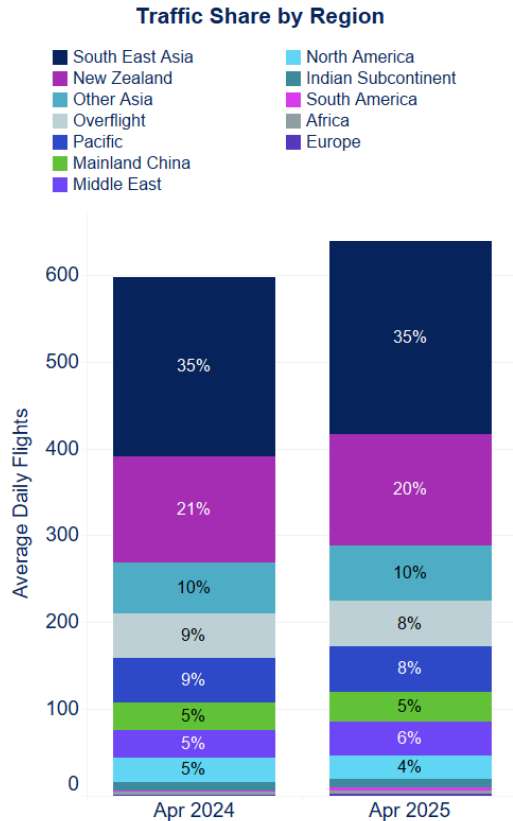
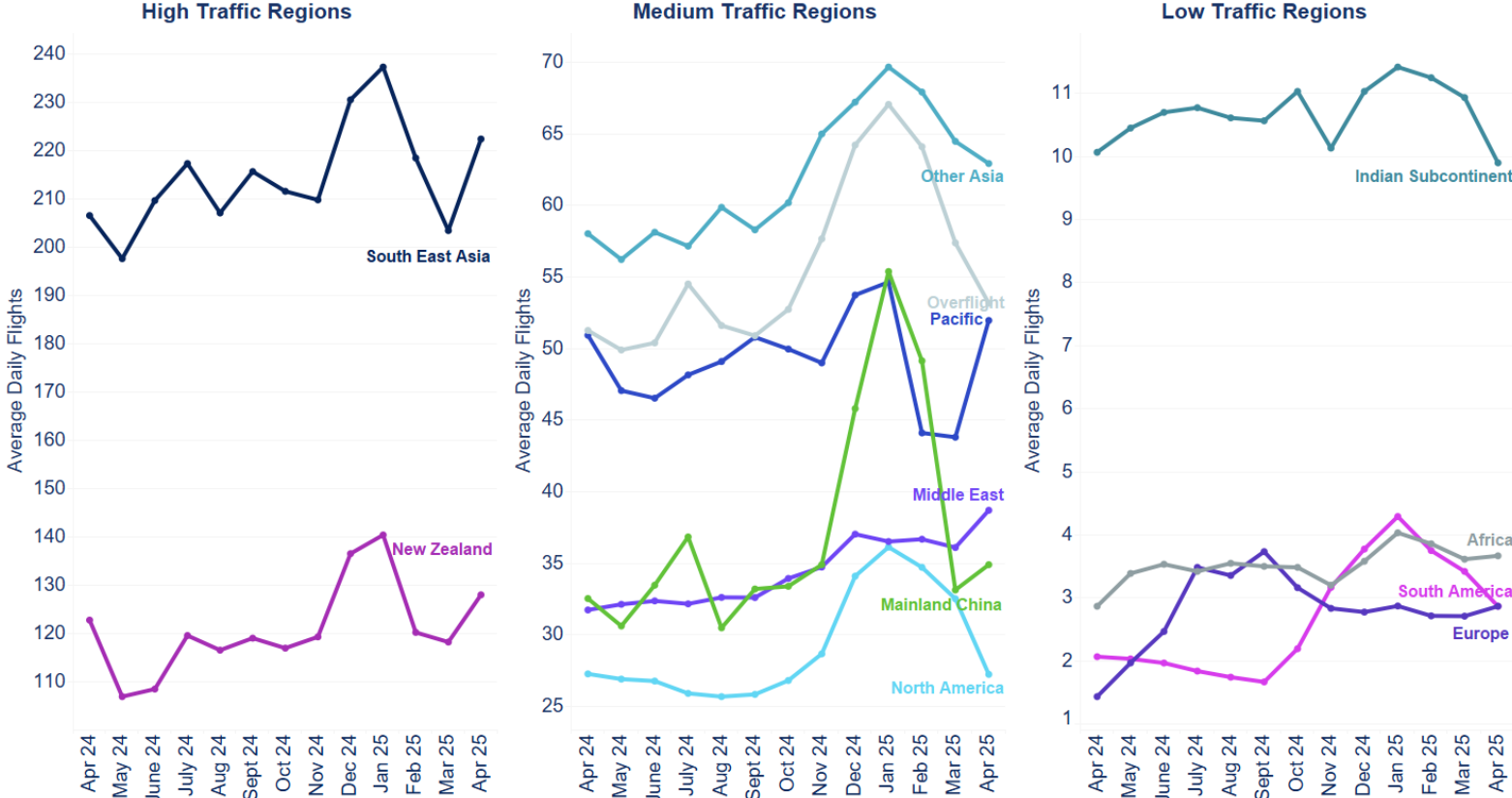


Figure 14. Average daily flights by international markets per month.

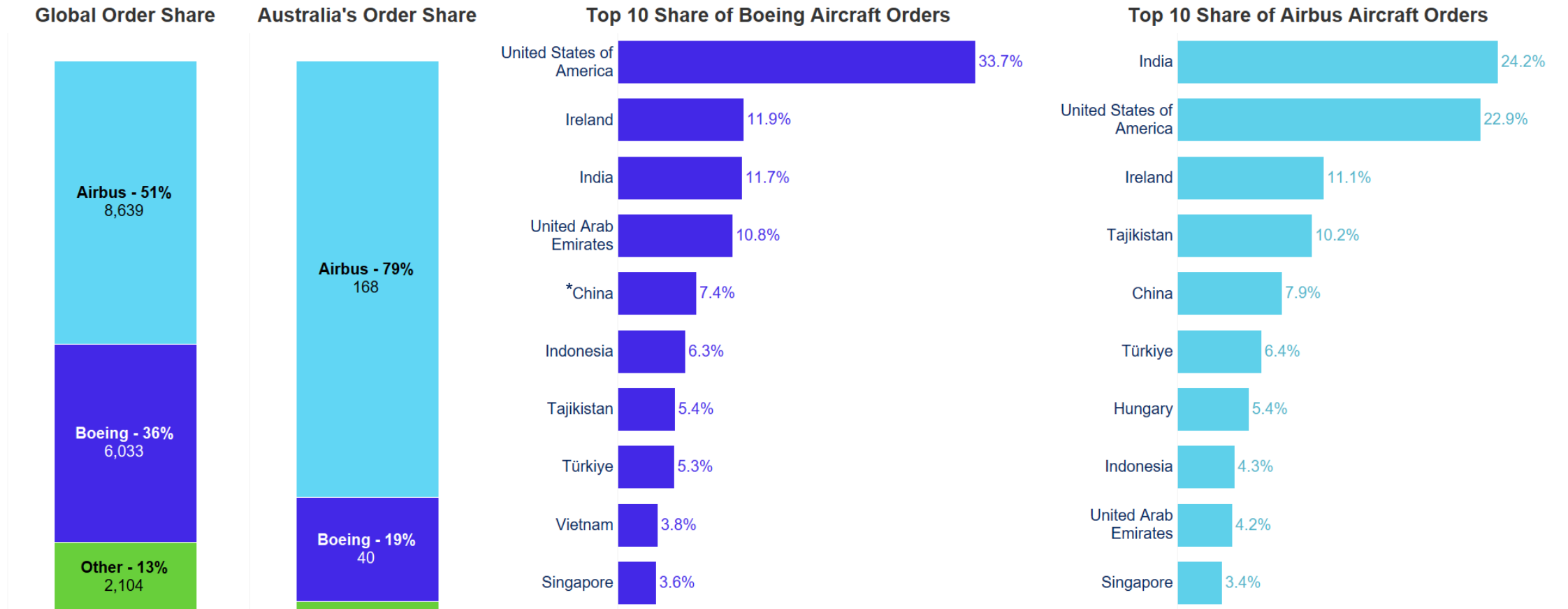


Source: Aircservices ODAS (includes airline flights only).  
For multi-leg flights, legs that start and end outside Australian airspace are not included.

# Global and domestic fleet

Recent tariffs introduced between countries are further disrupting the aircraft manufacturing and supply chain globally. The combination of constrained aircraft delivery and high demand, as evidenced in unprecedented load factors, is putting upward pressures on operating cost and airfares in Australia.

Figure 15. Passenger aircraft on order: share by manufacturer globally and for Australia (left) top 10 country share by manufacturer (right).



Source: Centre for Aviation Fleet (CAPA) data, as of 4 May 2025. Orders for new build aircraft only.

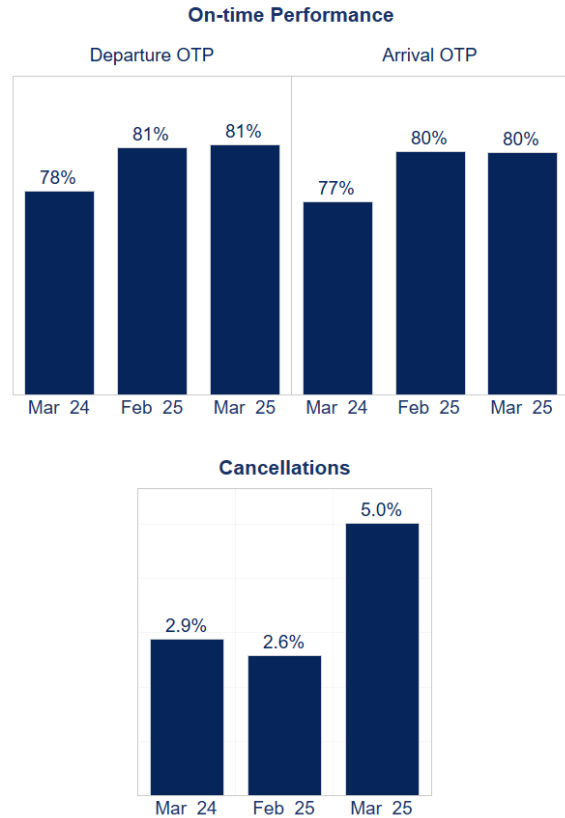
\* China has imposed a 125% tariff on products from the United States, while the United States has imposed a 145% tariff on products from China.

# Australian aviation network performance

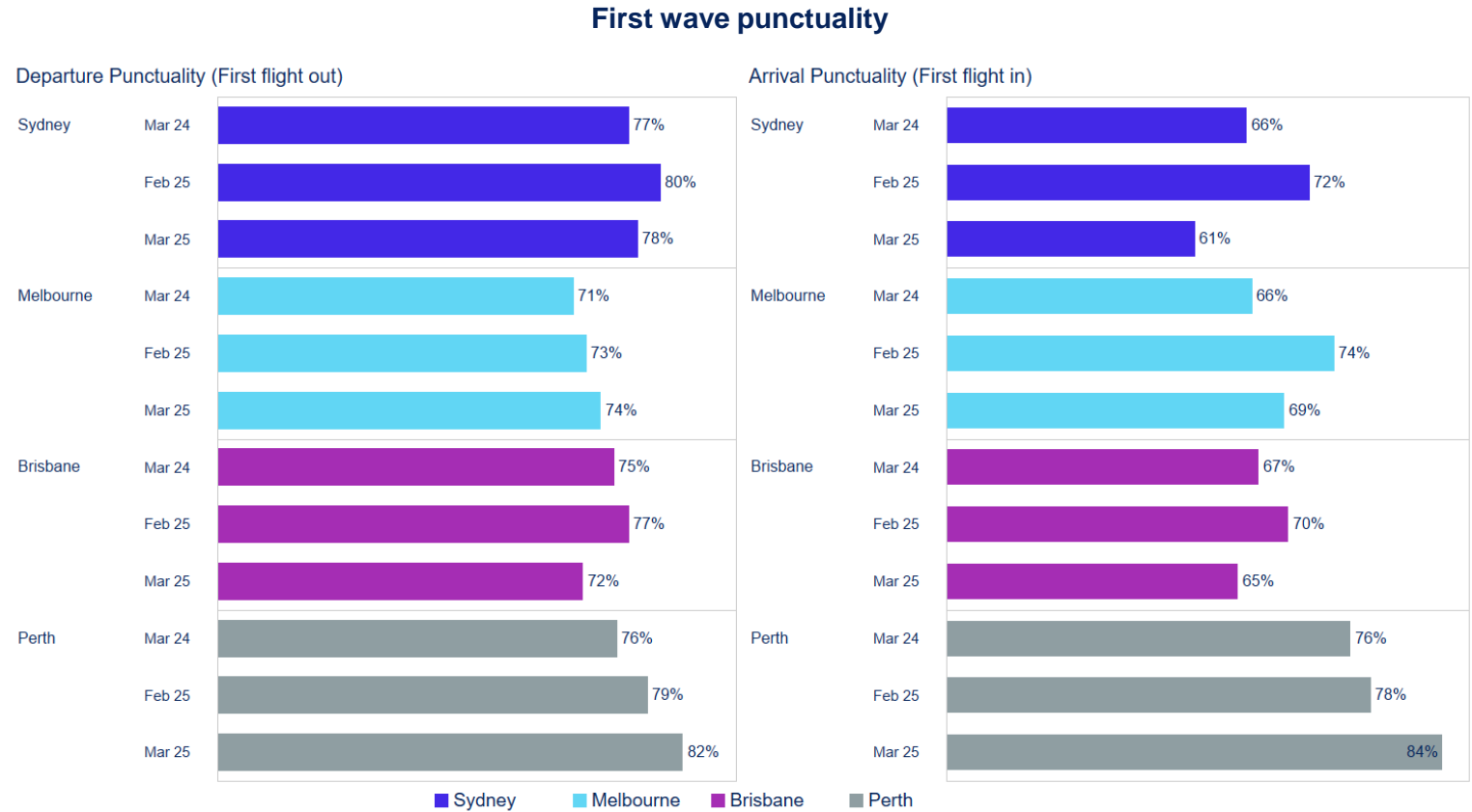
# Industry OTP and first wave performance

March marked the second consecutive month of highest industry on-time performance in three years. However, the cancellation rate was impacted by disruptions from ex-Tropical Cyclone Alfred. The overall improvement in industry performance is the result of collective focus on key network performance factors, including weather disruption management, engineering and operational spares, staffing, aircraft availability and strengthening resilience.

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



Source: BITRE for Australian data ([website](#)). Data available up to March 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)

Apart from the introduction of the new slot compliance measures at Perth Airport accounting for nearly 300 hours of Ground Delay Programs (GDP), nationally the application of ground delays has remained minimal even during high holiday demand periods while airborne delays remained steady at low levels. There have no ground delays at Brisbane in the last two months.

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

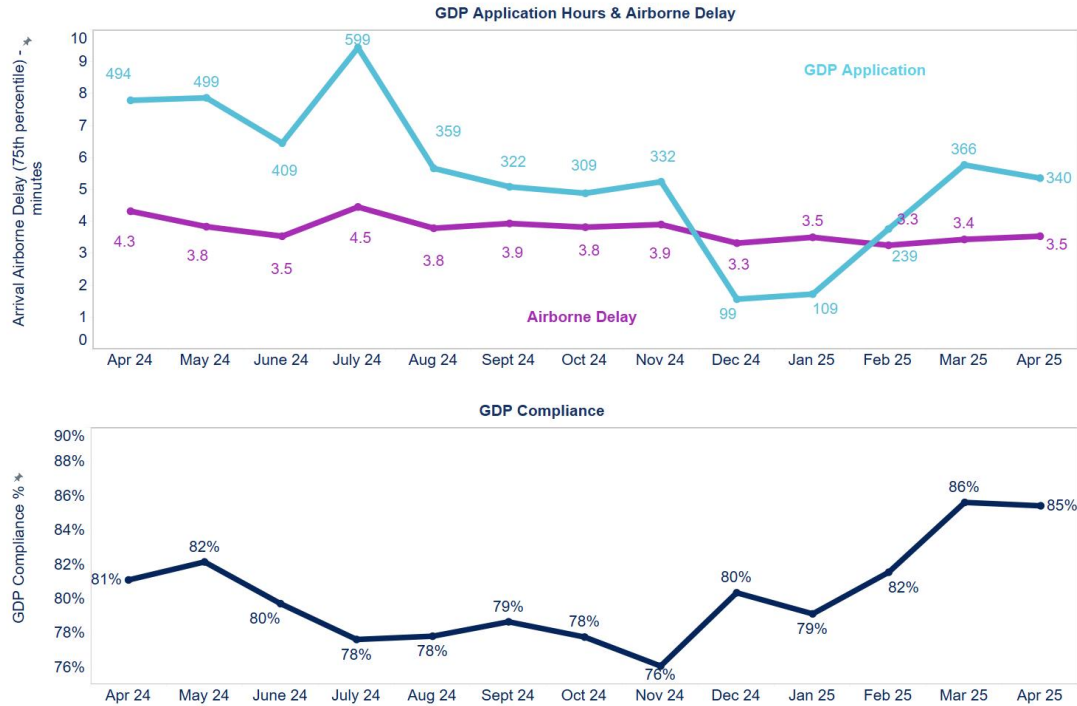
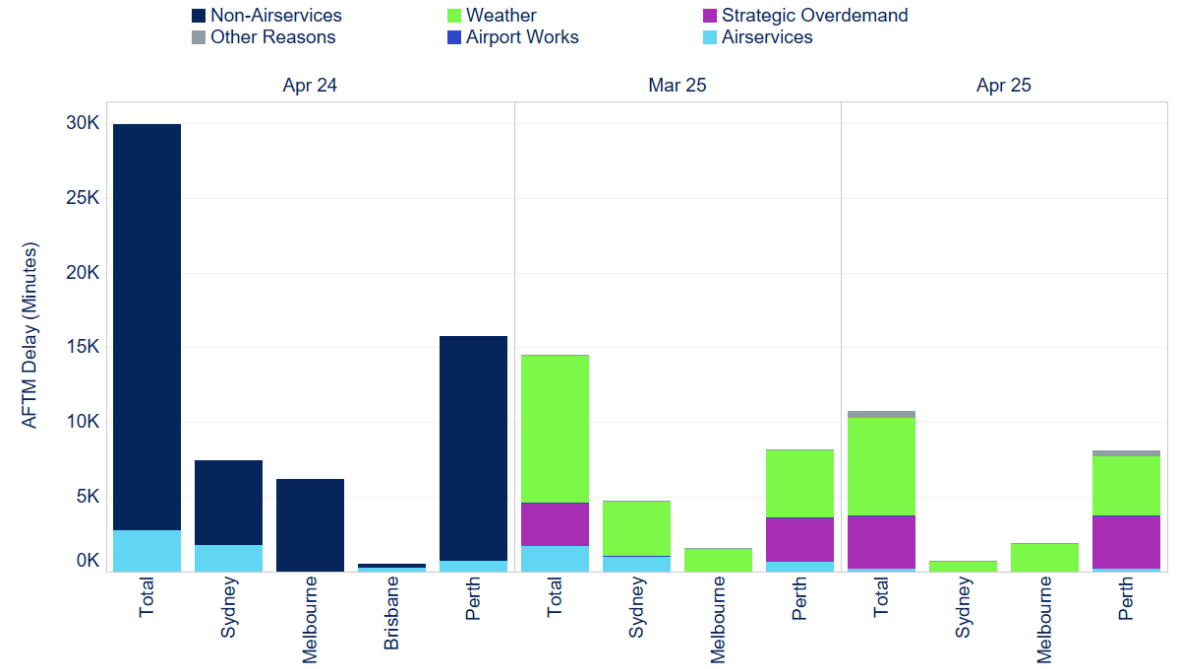


Figure 18. ATFM (GDP) delay by attribution and airport for three reference periods (April 2025, March 2025, and April 2024).



Airports with nil ATFM delay are not shown.

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.



# Network collaboration

Since the trial of air traffic flow management (ATFM) compliance measures at Perth in late February, we are seeing a consistent result in reduced ground delay contributing to improved OTP outcomes. We continue to engage with local stakeholders to confirm the acceptable cross-industry performance expectations and the next steps for ATFM governance measures.

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.

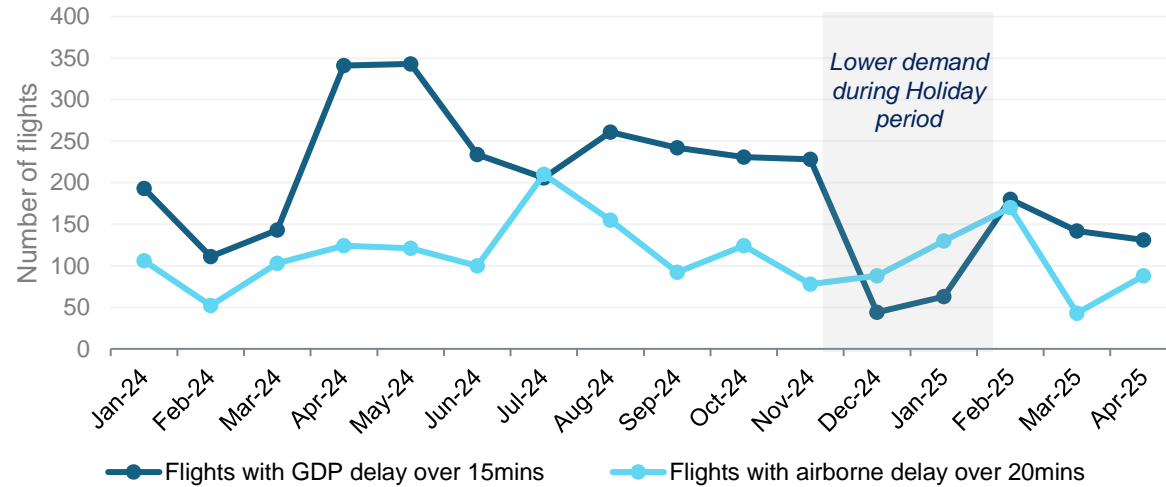
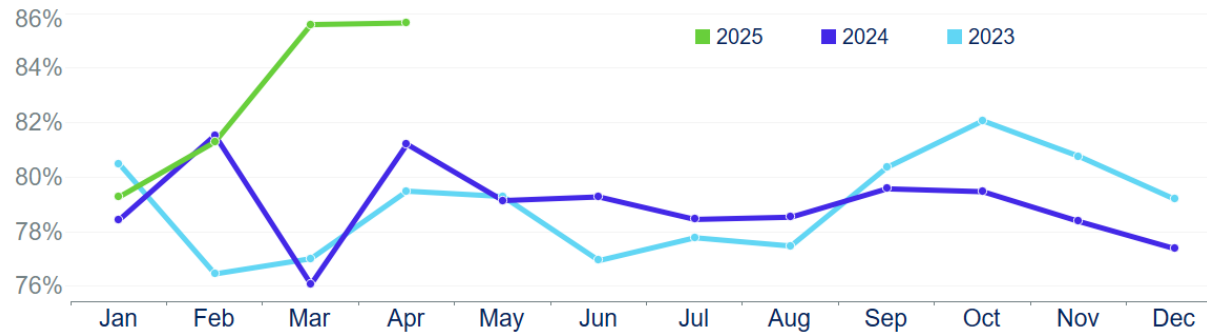


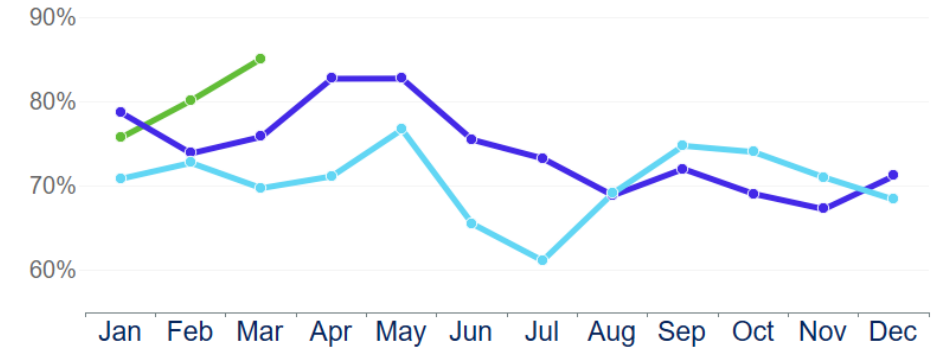
Figure 20. Perth GDP compliance.



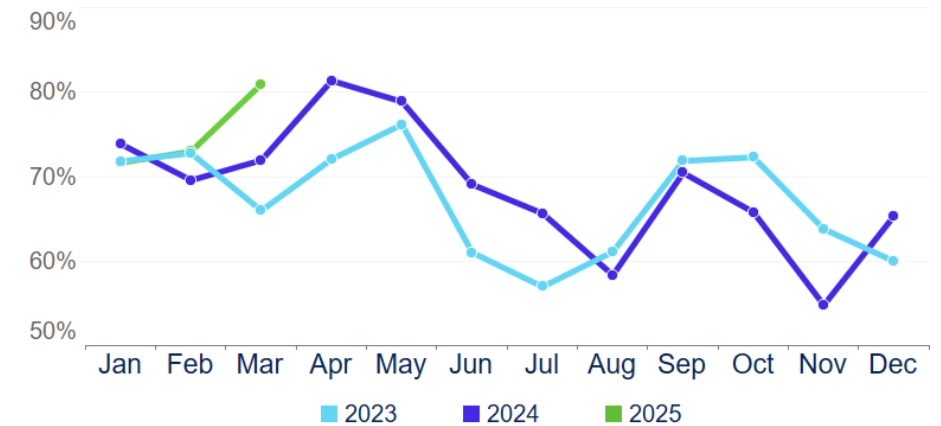
Source: Airservices ODAS.

Figure 21. Perth on-time performance.

## Departure On-Time Performance: Departures from Perth



## Arrival On-Time Performance: Arrivals into Perth



Source: BITRE, data available up to 31 March 2025 based on latest BITRE data release ([website](#)).

# Air Traffic Service Provision

Our service performance continues to improve, with no airspace service variations over the Easter/Anzac holiday period. This is the result of embedding layers of resilience measures to protect peak travel demand periods. We have endorsed 21 additional controllers in Quarter 1, following 52 last year. Ensuring high-standard services to foster regional aviation remains a key focus, and we are exploring all necessary measures to enhance recruitment, resource deployment, and training processes.

Figure 22. Overall Airservices' attributable impacts (April 2025)

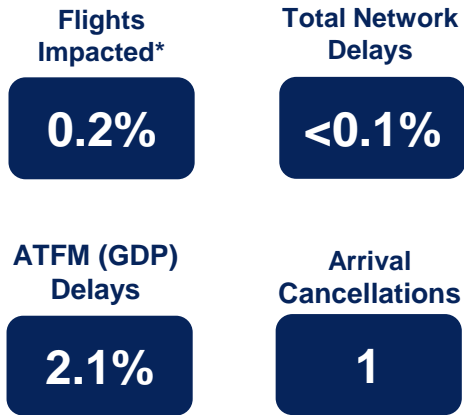
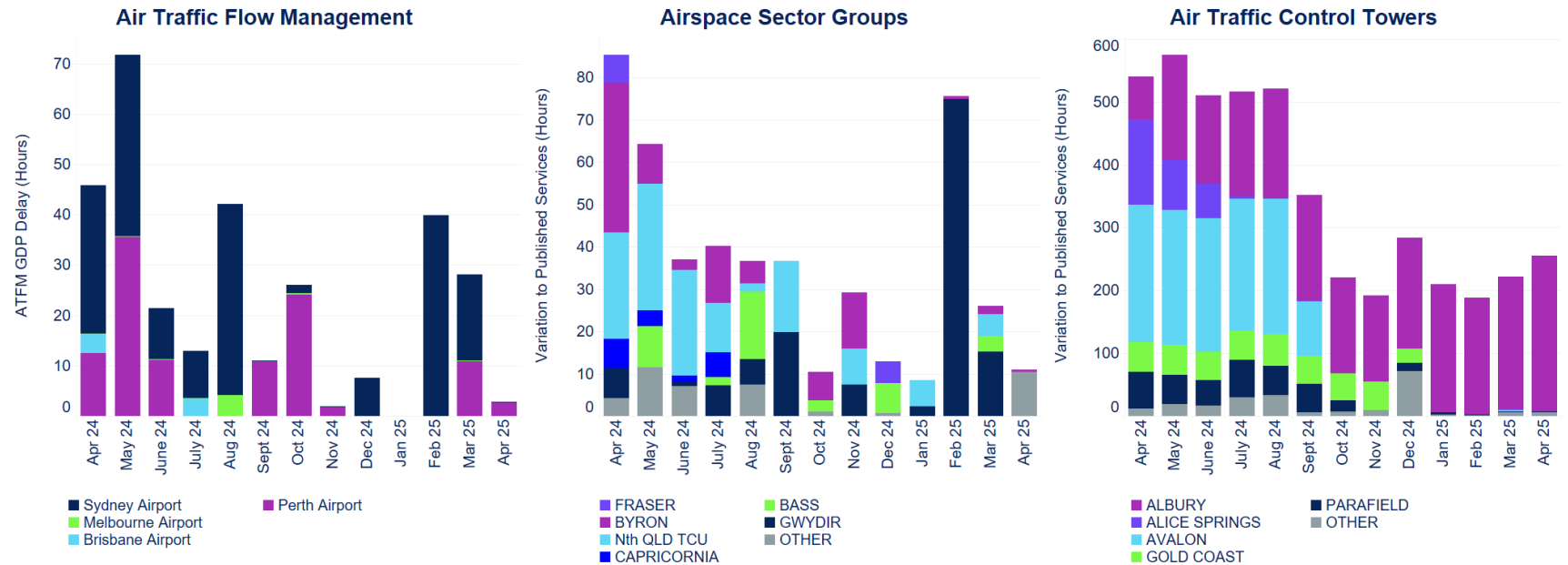


Figure 23. Airservices attributable hours of ATFM GDP delay (left) and variation from published levels across Airspace Groups (centre) and ATC Towers (right).



Source: Airservices ODAS (general aviation, military, and government flights are excluded).

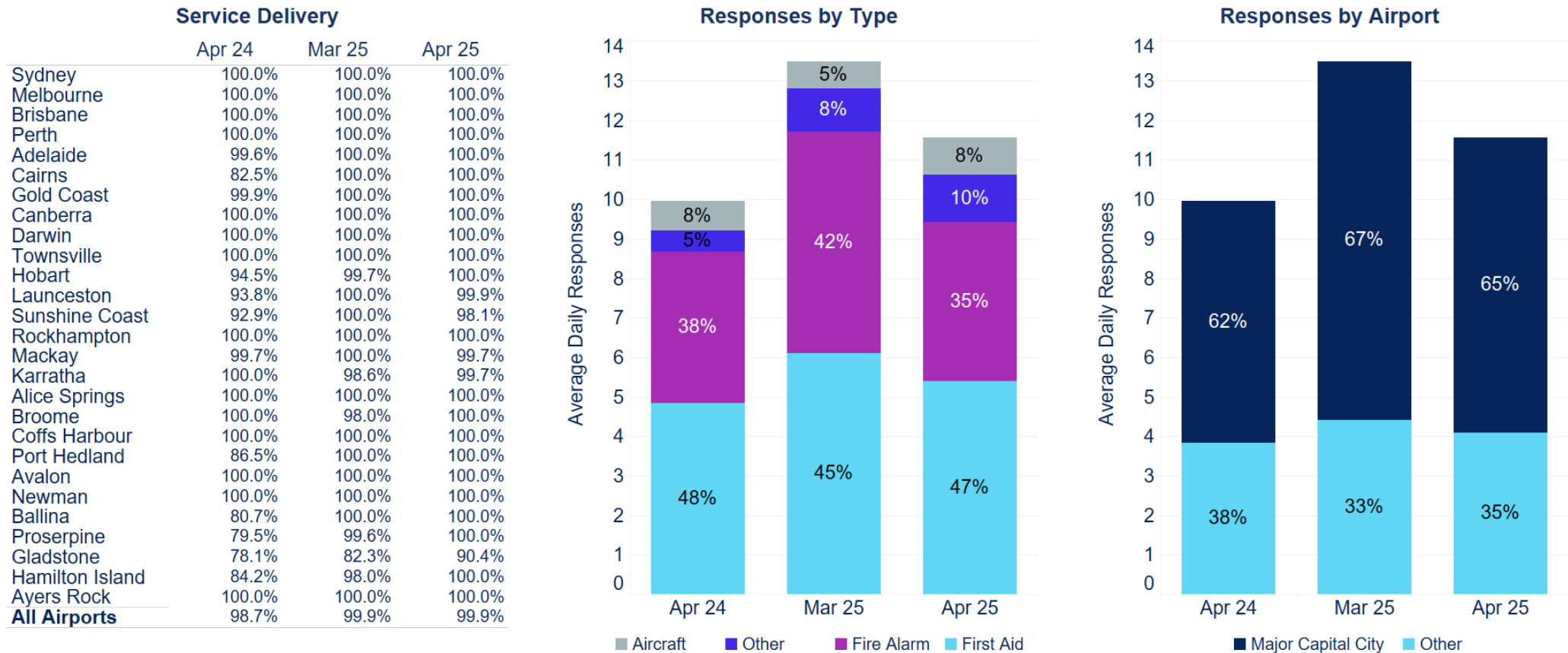
Variations to published services comprise of Temporary Restricted Areas and tower closure periods. During the periods of variations to published services at regional aerodromes, services in adjacent Class G airspace are generally unaffected (e.g. provision of flight, traffic information and safety alerting). Service variations are with respect to published services as per ERSAs 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 April, Aviation Rescue Fire Fighting Services (ARFFS) handled 347 emergency calls across 27 airports. Across all locations, we remain committed to ensuring consistent coverage of these essential services to aircraft and airports.

Figure 24. ARFFS service delivery by airport and total (left) emergency responses by type (middle) and by airport category (right) for three reference periods.



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](mailto:stakeholder@airservicesaustralia.com)