



Australian Aviation Network Overview

Financial Year 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

This June 2025 edition of the Australian Aviation Network Overview (AANO) report provides a snapshot of key performance results achieved for the Australian aviation network in Financial Year 2025 (FY2025). This report continues to evolve and demonstrates Airservices commitment to network improvement and transparent reporting for the benefit of the industry and travelling public.

Despite global geopolitical and trade uncertainties, our sector has returned to growth supported by strong tourism, easing inflation and a shared commitment to sustainable aviation.

In FY2025, the network activities stabilised, marked by a 6% year-on-year growth in international flights while domestic flights declined slightly by 1%. Passenger demand continued to outpace fleet capacity, driving record load factors. General aviation, particularly flight training, experienced steady 4% year-on-year growth.

However, structural and operational challenges remain, including reductions in regional routes, ongoing aircraft supply chain constraints and extreme weather events. These factors continue to test the network capacity and operational resilience across the ecosystem.

Amidst this dynamic environment, FY2025 marked a five-year high in on-time performance, aligning with global benchmarks. This result is due to industry-wide efforts to improve first-wave punctuality, resource management, and collaborative planning and crisis management.

A sustained focus on network governance and coordination in protecting peak demand periods has delivered measurable improvements. The application of Ground Delay Programs (GDP) saw ground delays fall by approximately 50%, while average airborne delays improved by over 10%.

Airservices air traffic service performance reached its highest levels in the last three years in terms of airspace service variations and impact on network outcomes. These results reflect the efforts in driving increased recruitment with the largest recruitment program in Airservices' history, adding 62 new air traffic controllers in FY2025, including experienced recruits. Despite having reached a full staffing complement in Sydney Tower, a staff availability challenge on 22 June resulted in 21 hours of ground delays and 14 cancelled arrivals. Whilst disappointing, H1 FY2026 will see Airservices' focus on strengthening roster resilience through ongoing recruitment, building standby capacity in critical locations.

Year in review: FY2025 vs FY2024

Improved passenger experience amid growth in traffic volume and load factors



+2%

Domestic passengers



84%

Domestic load factor
monthly average, up
from 81%



-1%

Domestic flights



+6%

International flights



76%

On-time performance,
up from 72%



2.5%

Cancellation rate,
down from 3.7%

Enhanced air traffic and aviation rescue fire fighting (ARFF) service outcomes focusing on industry needs



-49%

Ground Delay Program
(GDP) application
hours at major airports



-75%

Ground delay minutes
attributable to
Airservices at major
airports



-64%

Variations to
published services in
airspace sectors



-47%

Variations to
published services at
control towers



99.7%

ARFF service at
category, up from
99.3%



>82%

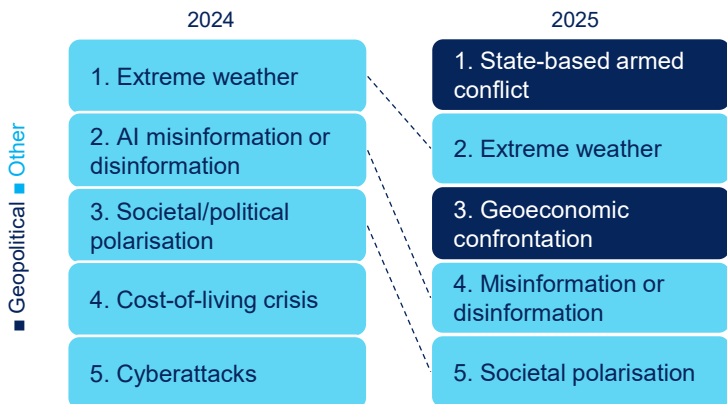
compliance with A-
CDM live in Brisbane,
exceeding the global
benchmark

Economic and social trends

Economic factors

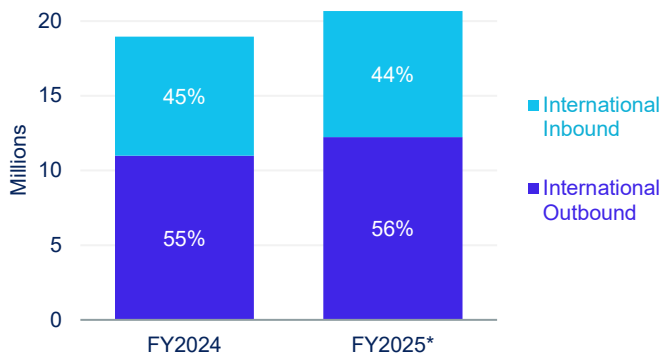
Despite global geopolitical and trade uncertainties, the growth of the Australian aviation sector is supported by resilient international travel, easing inflation and a strong tourism industry contributing above the global average to GDP.

Figure 1. Global risk landscape, top 5 factors.



Source: World Economic Forum ([website](#)) – latest data as at 4/7/2025

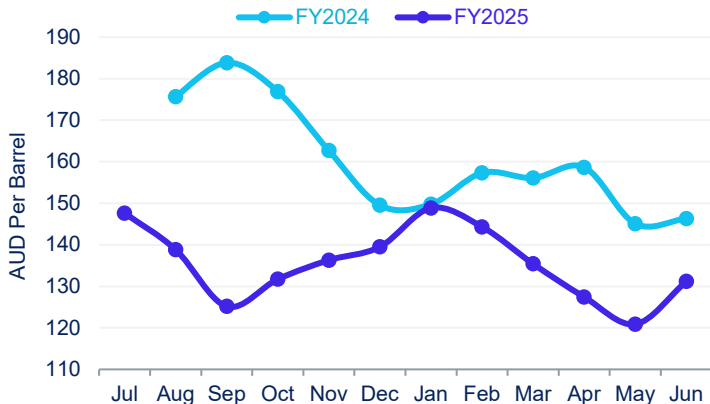
Figure 4. Short term international outbound (residents) and international inbound (visitors).



Source: ABS ([website](#)) – latest data as at 4/7/2025.

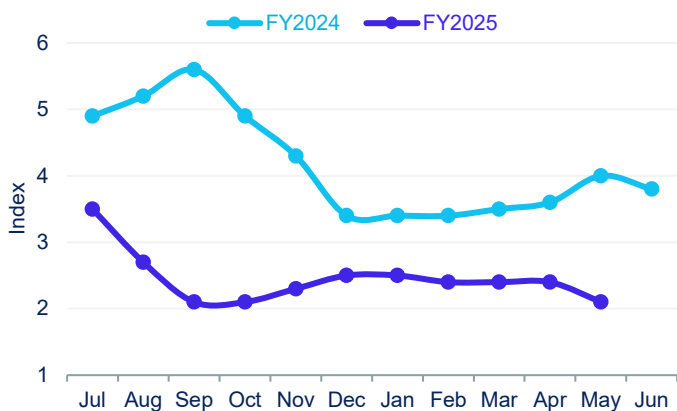
* Normalised for year-to-date.

Figure 2. Jet fuel prices (daily average per month).



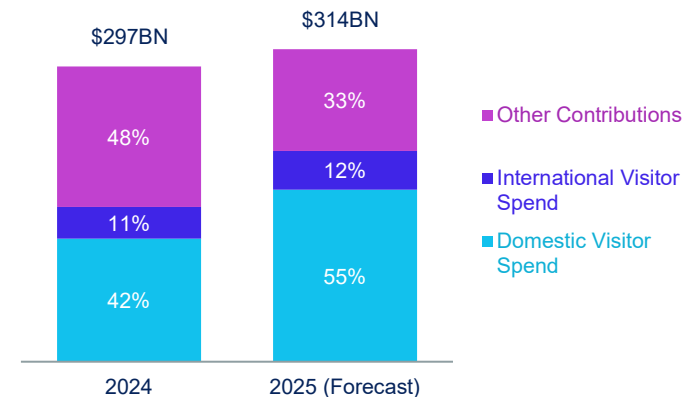
Source: Bloomberg – latest data as at 4/7/2025.

Figure 5. Consumer Price Index (CPI) Indicator.



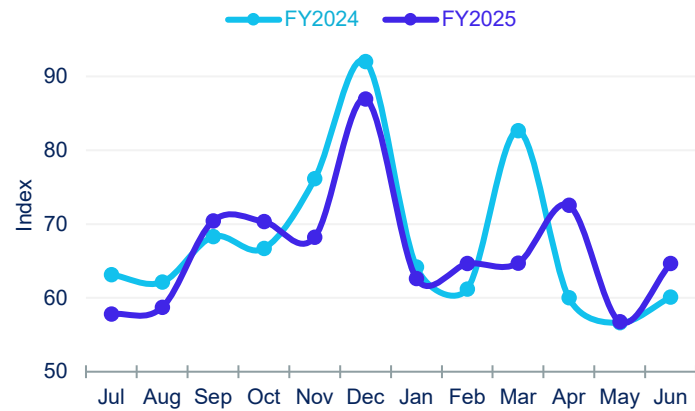
Source: ABS ([website](#)) – latest data to April 2025 as at 4/7/2025

Figure 3. Australian travel and tourism industry.



Source: World Travel & Tourism Council ([website](#)) – latest data as at 4/7/2025

Figure 6. Domestic airfares (real best discount).



Source: BITRE ([website](#)) – latest data as at 4/7/2025

Social factors

Sustainable aviation remains a shared industry commitment. In FY2025, the number of aircraft noise complainants decreased to a five-year low, and total complaints were down 9% from FY2024. However, recent increased complaint frequency in some areas highlight the ongoing need to build understanding and seek noise relief for local airport communities. Meanwhile, increased emissions savings from optimised upper airspace routes demonstrate the impact of industry collaboration in driving cleaner, greener skies.

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

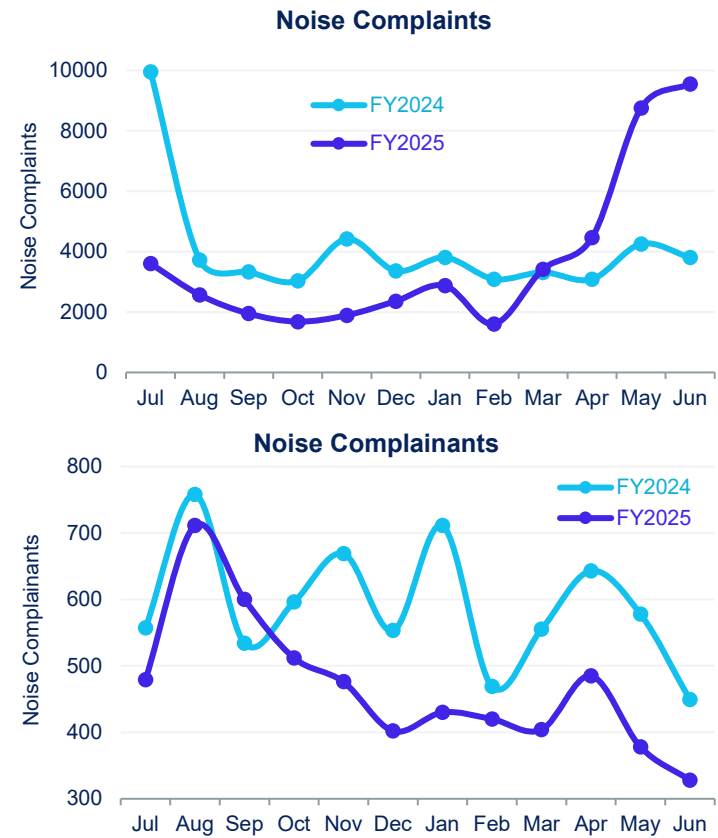


Figure 8. Location specific aircraft noise complaints (left), noise complainants (middle), and noise complainant trend (right) for FY2025 and FY2024.

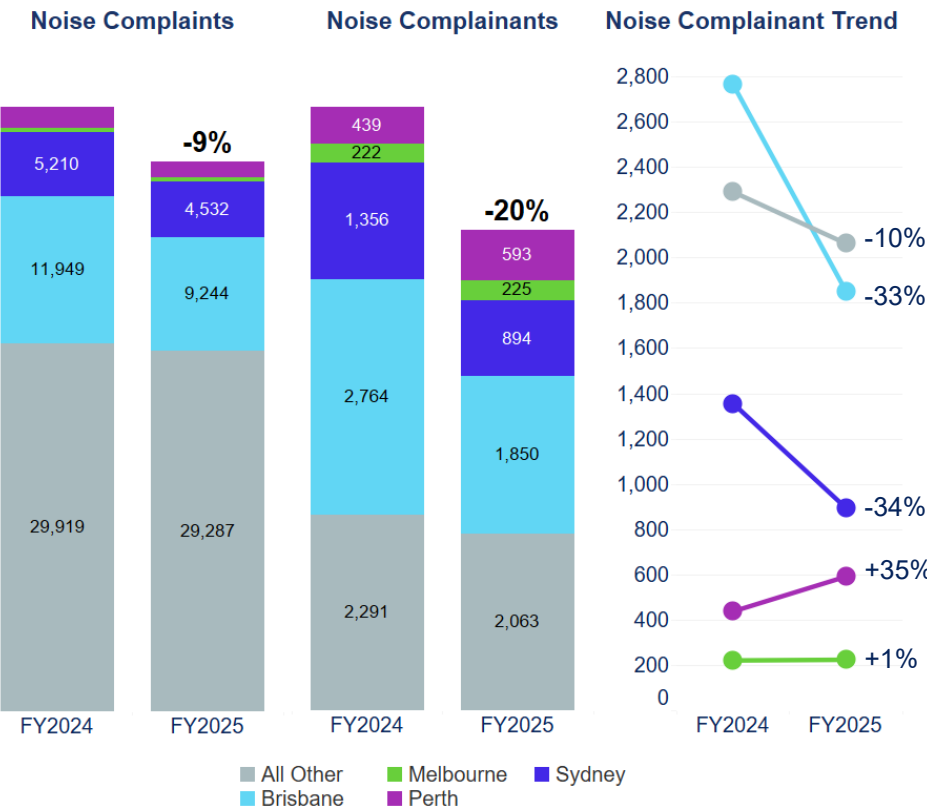
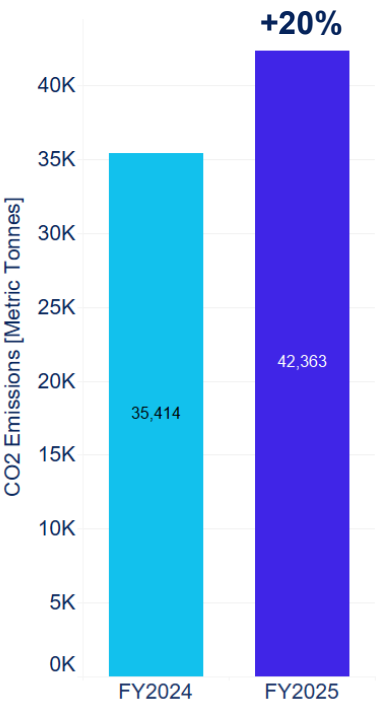


Figure 9. CO₂ emissions savings from optimised User Preferred Routes (UPR) per month.



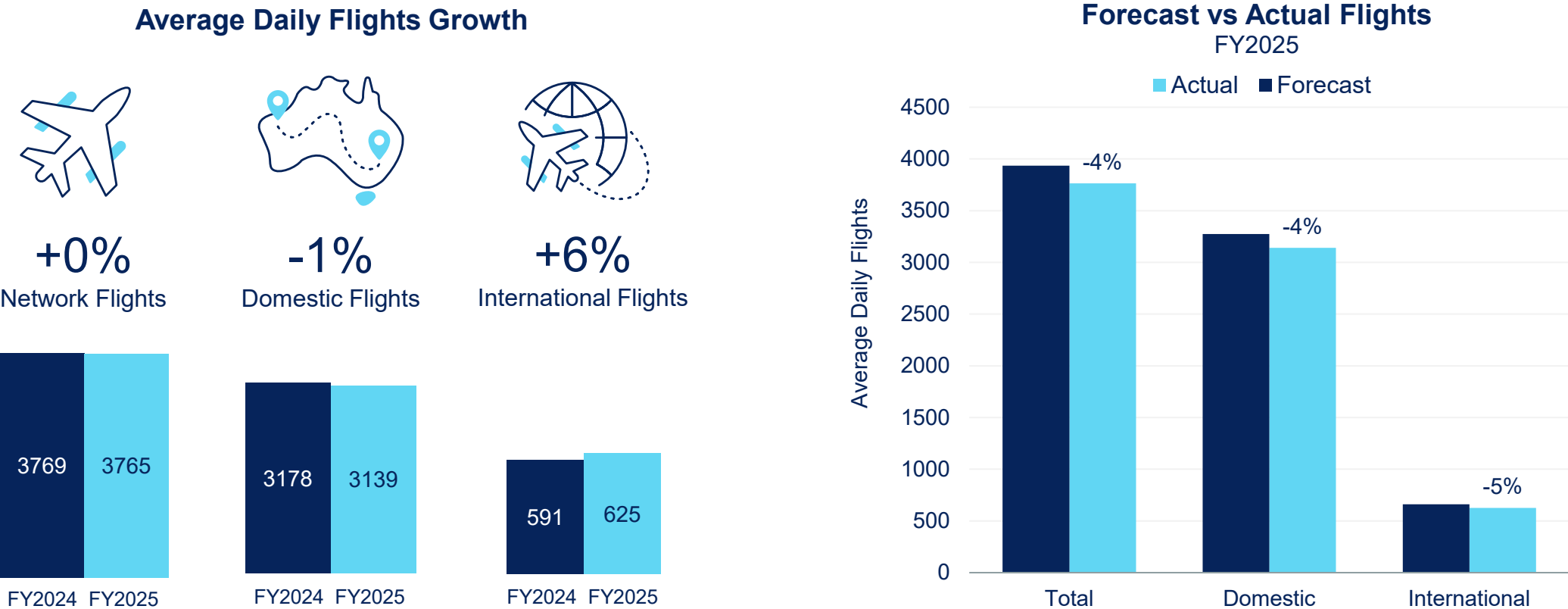
Source: Airservices Noise Complaints and Information Service (NCIS) and Airservices ODAS. CO₂ emissions savings from UPR are across oceanic and cross-continental airspace.

Australian aviation and regional context

State of Australian aviation growth

The overall network activities stabilised in FY2025, with growth primarily driven by international recovery. However, several structural and operational challenges remain, including a reduction in regional routes, ongoing aircraft supply constraints, and weather disruptions such as Tropical Cyclone Alfred and the recent Bomb Cyclone in Sydney. These factors highlight the inherent uncertainty in the operating environment and complexity in aviation forecasting and planning.

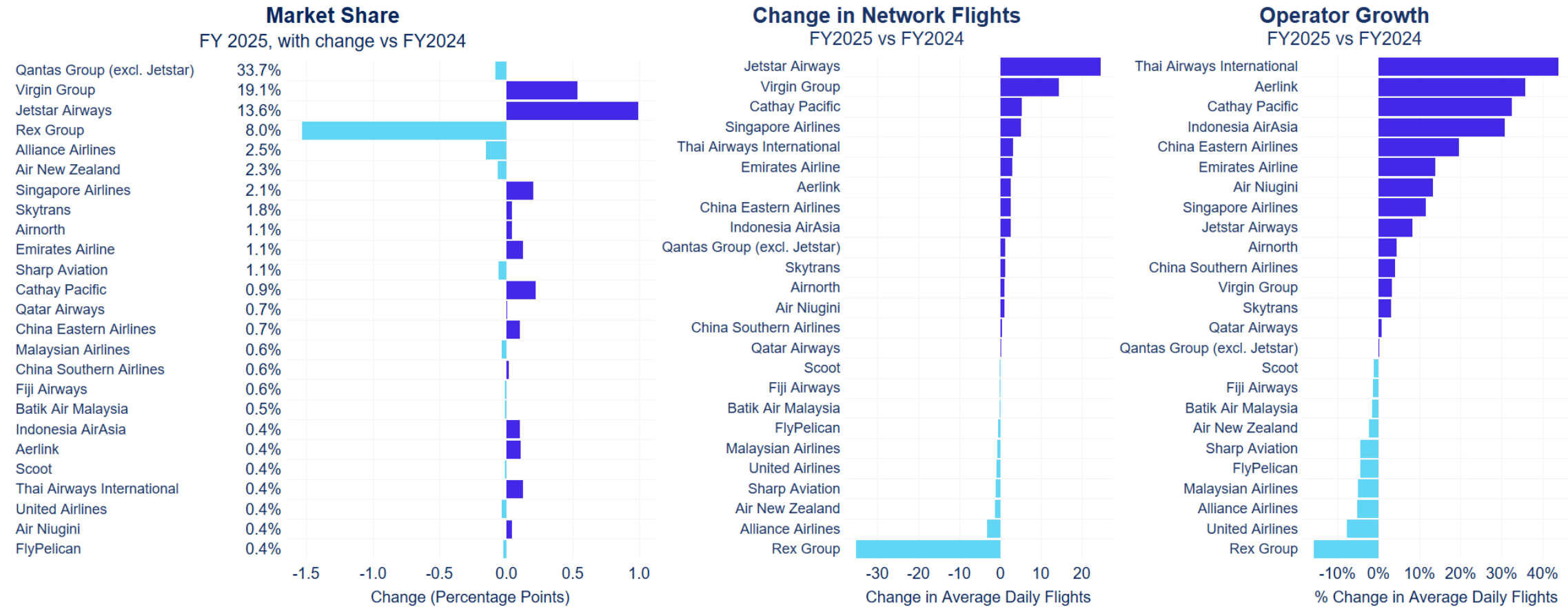
Figure 10. Network growth for FY2025 and FY2024 (left) and actual flights compared to Airservices’ forecast per month (right).



Top aircraft operators

The fastest growing operators are those capitalising on strong tourism demand in Australia and the Asia Pacific region, leveraging strategic hubs like Bangkok, Singapore and Doha, and having the ability to expand capacity and routes.

Figure 11. Top operators growth in FY2025 compared to FY2024, including market share (left), change in average daily flights (middle), and operator growth (right).

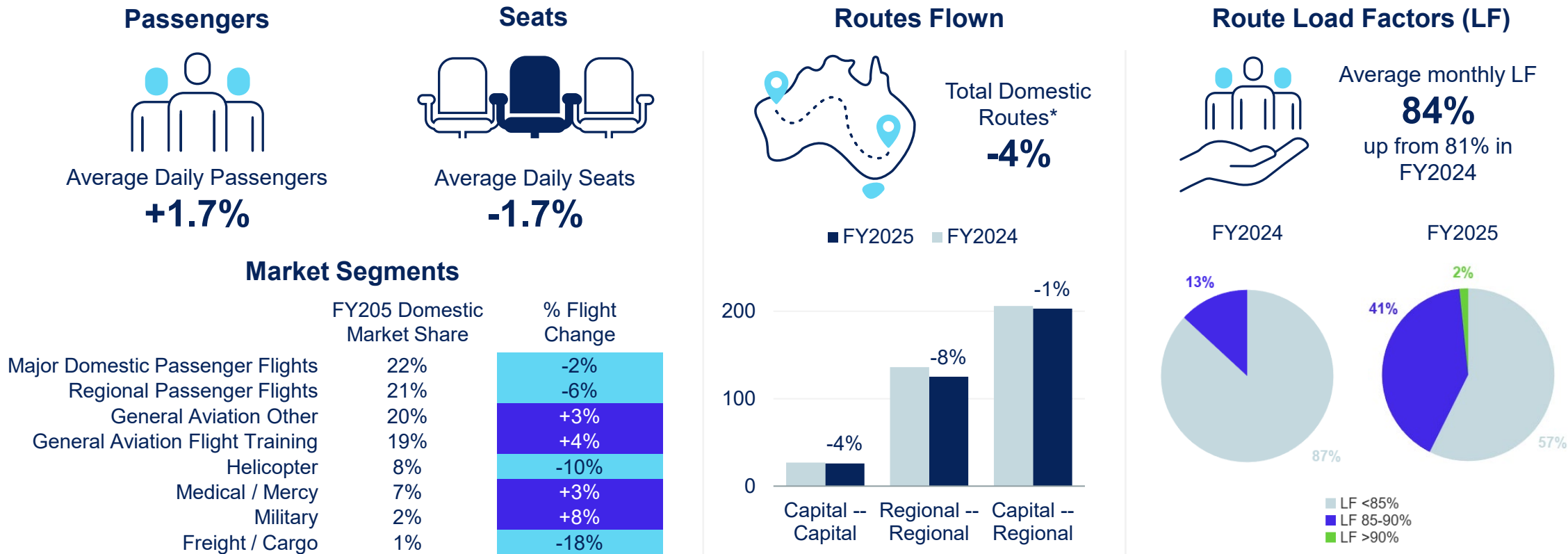


Source: Airservices ODAS (includes airline flights only). Only top 25 airlines by flights are shown.

Domestic network

Domestic passenger demand continued to outpace available fleet capacity, resulting in record load factors particularly along major corridors. However, aircraft supply constraints and reduced airline competition are limiting route expansions. Meanwhile, general aviation is experiencing steady growth, especially in flight training, reinforcing Australia's position as an attractive destination for aviation education.

Figure 12. Domestic network measures for FY2025 with comparison to FY2024, including passenger and seats (top left), flights by market segments (bottom left), number of routes flown (middle), and proportion of routes by average monthly load factor (right).



Source: Airservices ODAS and BITRE (for passengers, seats, load factors) and includes domestic flights only.

FY2025 figures reflect data available to date, with a one-month lag for Airservices ODAS and a two-month lag for BITRE. Comparisons to FY2024 are based on the same months of available data.

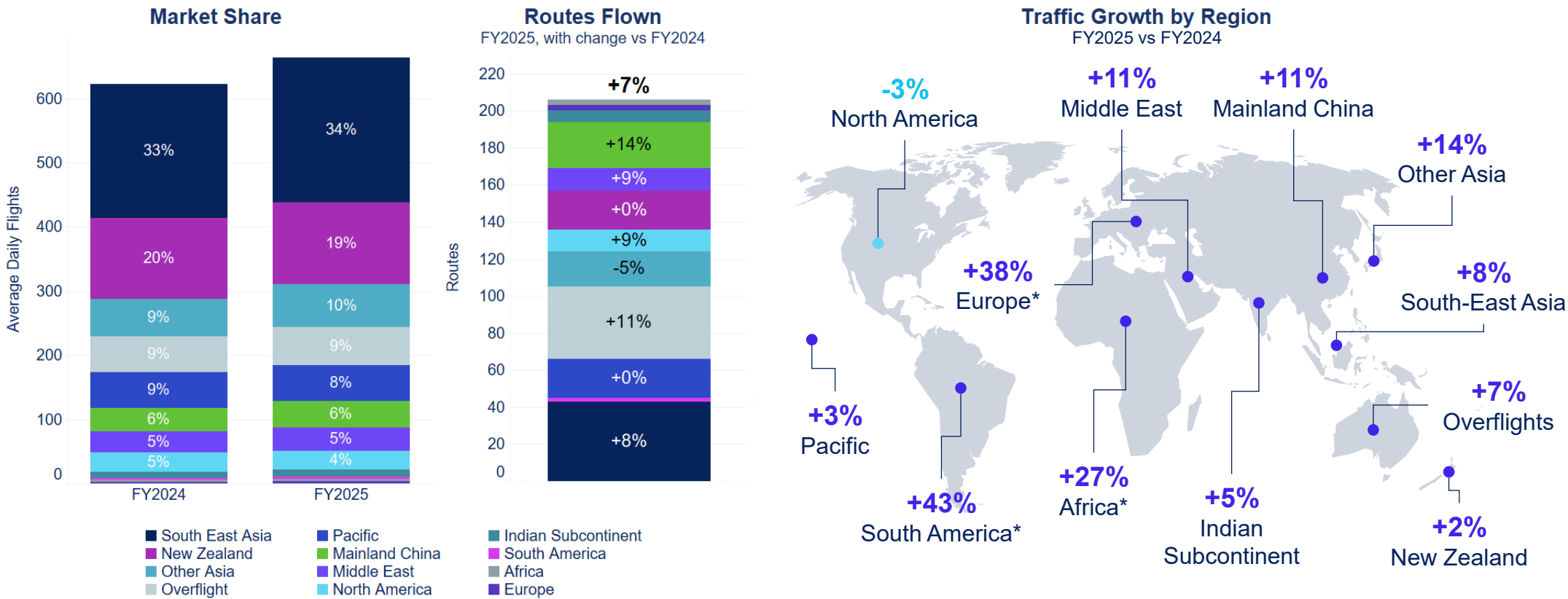
All graphs - except those showing market segments - represent the domestic passenger segment only.

* The percentage reduction in domestic routes does not correspond to the same percentage reduction in domestic flights, as some routes operate with low frequency. Only routes with at least 2 weekly passenger flights are included.

International markets

International growth is being led by Asia and the Middle East, driven by relaxed visa entry requirements in key tourism markets like China and Thailand, and supported by carriers with the capacity to deploy modern long-haul fleets and expand route networks. In contrast, slower growth in New Zealand indicates ongoing aircraft and component supply chain constraints and competitive pressures from alternative transit hubs, while stagnation in North America may signal shifting traveller preferences.

Figure 13. International market measures for FY2025 and comparison to FY2024, including market share by region (left), number of routes flown (middle), traffic growth by region (right).



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

Network fleet

Overall network fleet changes include the delivery of new domestic aircraft, with future capacity growth over the next 11 years expected to be driven by Airbus fleet expansion among low-cost carriers. While deliveries in the past year helped offset the retirement of older aircraft, fleet deployment remains constrained, keeping load factors elevated.

Figure 14. Domestic aircraft deliveries by operating status.

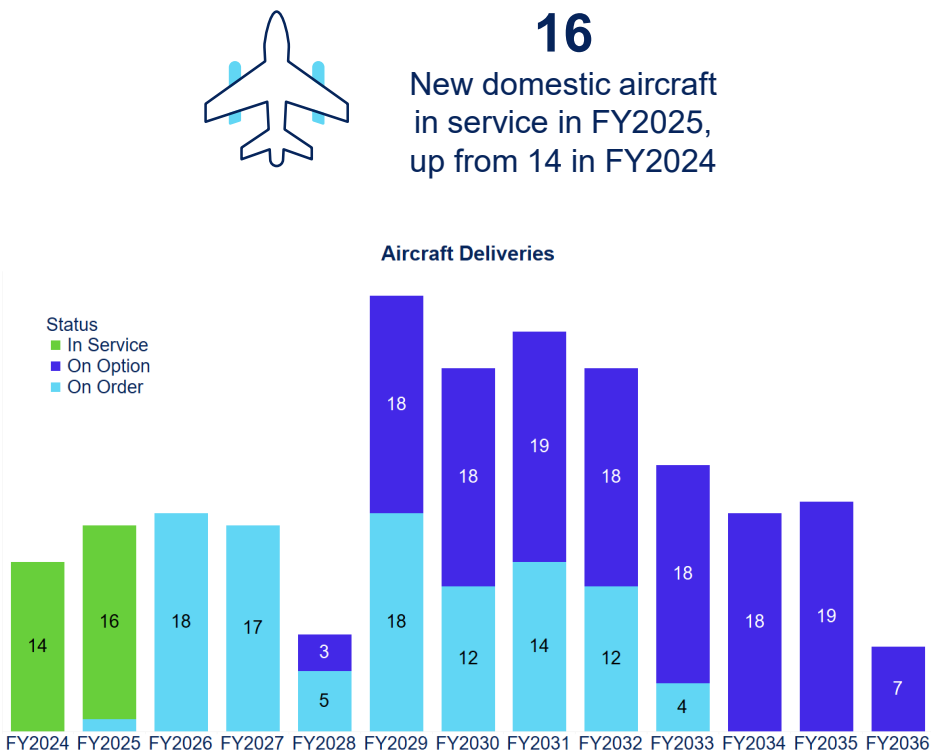
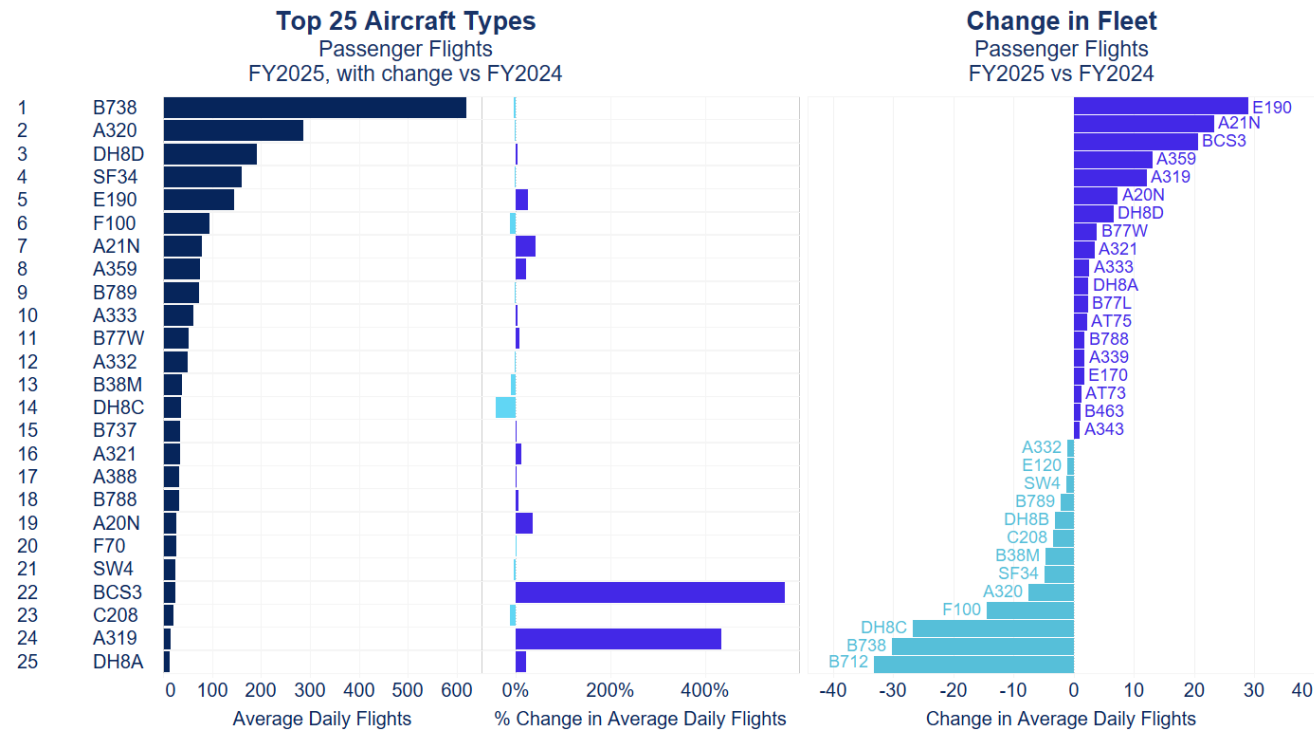


Figure 15. Fleet changes in FY2025 compared to FY2024, including top 25 aircraft types by daily average flights (left) and change* in overall fleet by aircraft type (right).



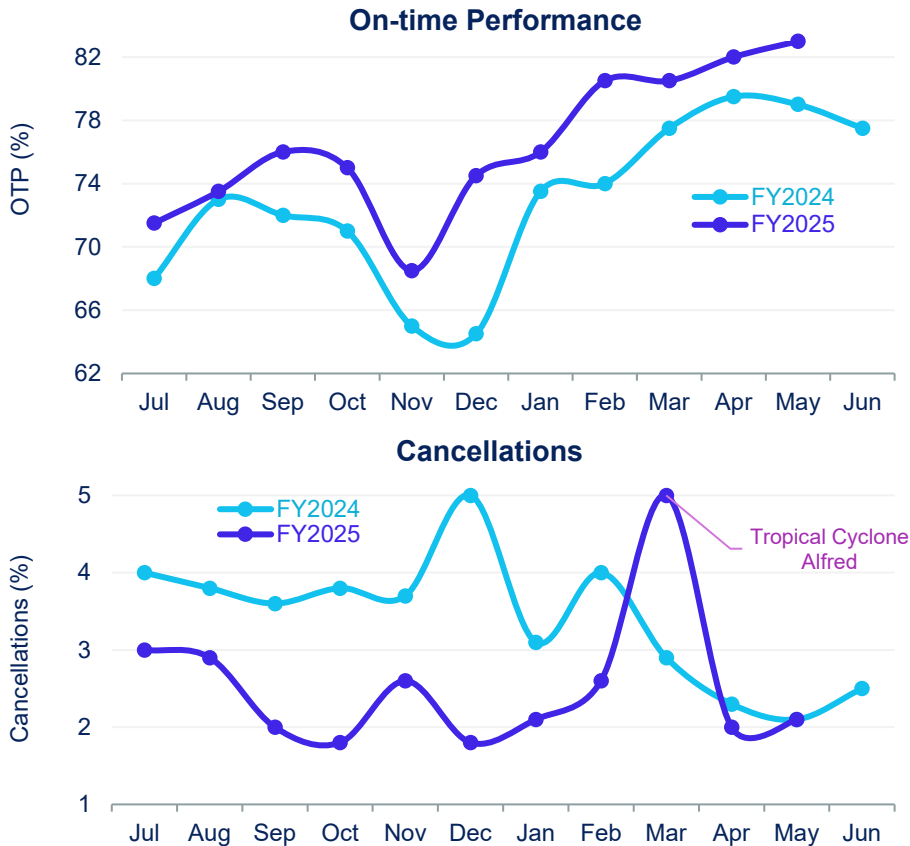
Source: Airservices ODAS – including only airline flights (right) and Centre for Aviation Fleet (CAPA) data, as of 3 July 2025 (left). Aircraft deliveries are for new build aircraft only and includes only passenger aircraft with more than 10 seats. * Only changes of at least 1 average daily flight are shown.

Australian aviation network performance

Industry performance

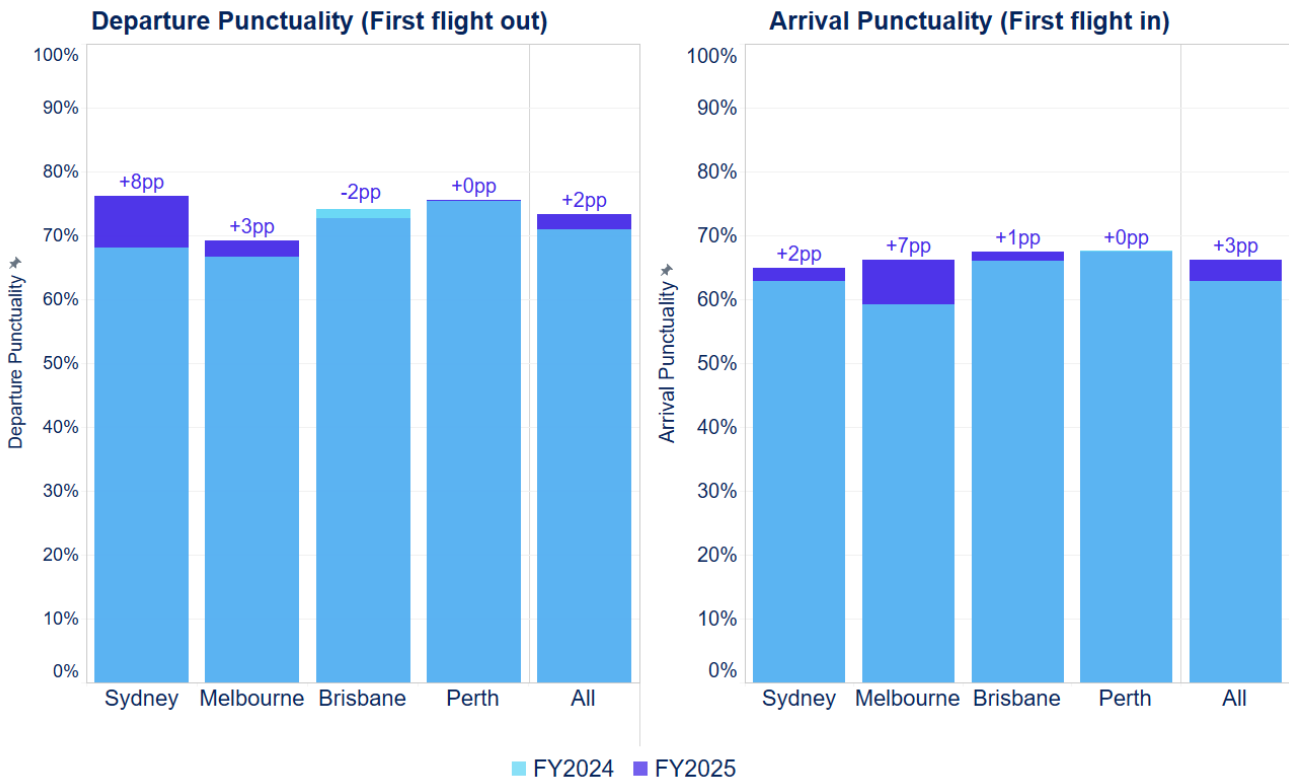
FY2025 saw on-time performance reaching a five-year high, matching global benchmarks. This is the result of industry-wide efforts to improve first-wave punctuality, aircraft turnaround, gate management, workforce resilience, and collaborative demand/capacity balancing. Despite significant weather events, including Tropical Cyclone Alfred, the sector continues to enhance scenario planning and crisis management to better anticipate and respond to disruptions.

Figure 16. Total industry OTP* and cancellations.



Source: BITRE for Australian data ([website](#)).
Data available up to May 2025 based on latest BITRE data release.
* Average of departure and arrival OTP.

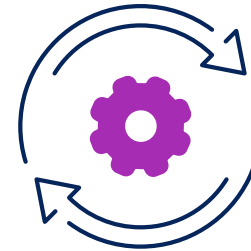
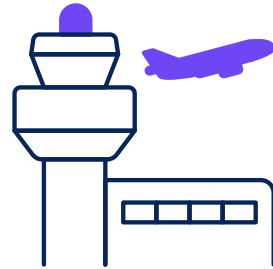
Figure 17. First wave punctuality at major airports and change by percentage points (pp).



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. Note that arrival punctuality at Perth is determined on a small number of flights, as few flights have their first rotation inbound to Perth.

Network management process

Airservices collaborate closely with airlines, airports, and industry stakeholders to balance scheduled demand with available runway capacity. A key tool in this effort is the Ground Delay Program (GDP), which can be implemented at Sydney, Melbourne, Brisbane, and Perth Airport, to enhance operational predictability and reduce tactical airborne holdings. The GDP is an agreed industry plan and requires careful coordination and compliance to deliver optimal network outcomes. We are increasing engagement with all airports, not just the major hubs, to build shared understanding of GDP drivers and network-wide impact. Digital Twin technology is embedded in GDP processes for data-driven decision making.



Flight Schedules

Strategic slot allocation is managed by Airport Coordination Limited (ACL) for Sydney and Capacity Optimisation Group (COG) for Melbourne, Brisbane and Perth – upon which airline **flight schedules** are then based. Airlines send their final flight schedules to Airservices Network Operations Management Centre (NOMC) the day prior to operations.

Capacity

Airservices facilitates the **available airport capacity** through a collaborative process with airlines and the Bureau of Meteorology. Factors which impact available capacity include:

- adverse weather, including fog, thunderstorms, and strong/gusty winds
- airport infrastructure and systems unserviceability, such as runway and taxiway pavement conditions, airport lighting systems and gate facilities
- Airservices' services and enabling infrastructure and systems.

Balancing

Airservices publishes the agreed-industry plan as a **Ground Delay Program (GDP)** to balance the demand with the available capacity. The GDP instructs aircraft to wait on the ground for their turn to depart, aiming to reduce excessive airborne holding at the destination. This increases predictability of operations and reduces risks of disruptions and tactical holdings.

Operations

Throughout the day of operations, industry **stakeholders work collaboratively** to monitor the aviation network performance to respond to events which put the network plan at risk. These include unforeseen adverse weather events, system or infrastructure outages. In instances when these events impact the network performance to a sufficient degree to warrant action, an update to the GDP will be agreed-upon by industry.

Air Traffic Flow Management (ATFM)

While ATFM accounts for less than 2% of total network delays, sustained focus on network governance, protection of peak demand periods and industry collaboration has delivered measurable improvements. In FY2025, the application of GDP and ground delay fell by approximately 50%, while average airborne delays improved by over 10%.

In Perth, a three-month industry trial of tightened ATFM processes led to a nearly 15 percentage point increase in monthly OTP. The implementation of Airport Collaborative Decision Making (A-CDM) at Brisbane in May, followed by Perth, Melbourne and Sydney in FY2026, is expected to deliver further operational enhancements including reduced taxi times and less apron congestion.

Figure 18. Key Ground Delay Program (GDP) metrics

	FY2024	FY2025
GDP Application Hours	7,238	3,680 (49% reduction)
Ground Delay Minutes	430,166	228,880 (47% reduction)
Arrival Airborne Delay Minutes per Flight (75 th Percentile)*	4.2	3.7 (12% reduction)
GDP Compliance	78%	80% (2pp increase)

Figure 19. Contribution of ATFM (GDP) Delay to total network delays in FY2025.

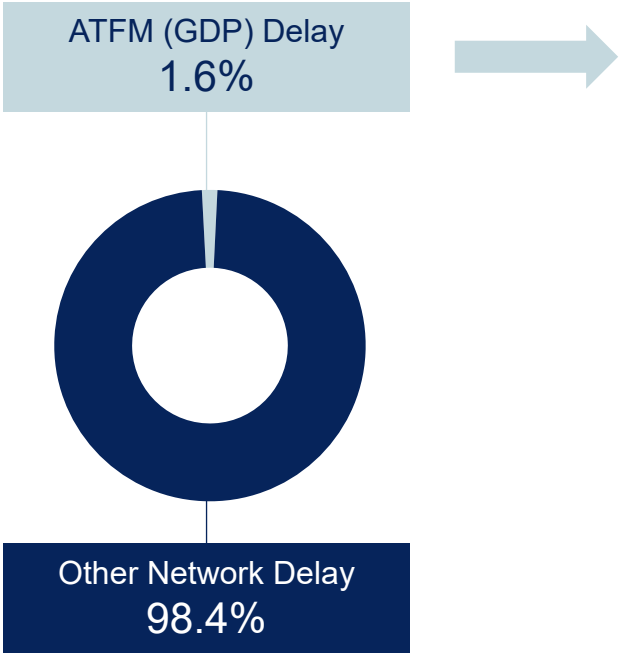
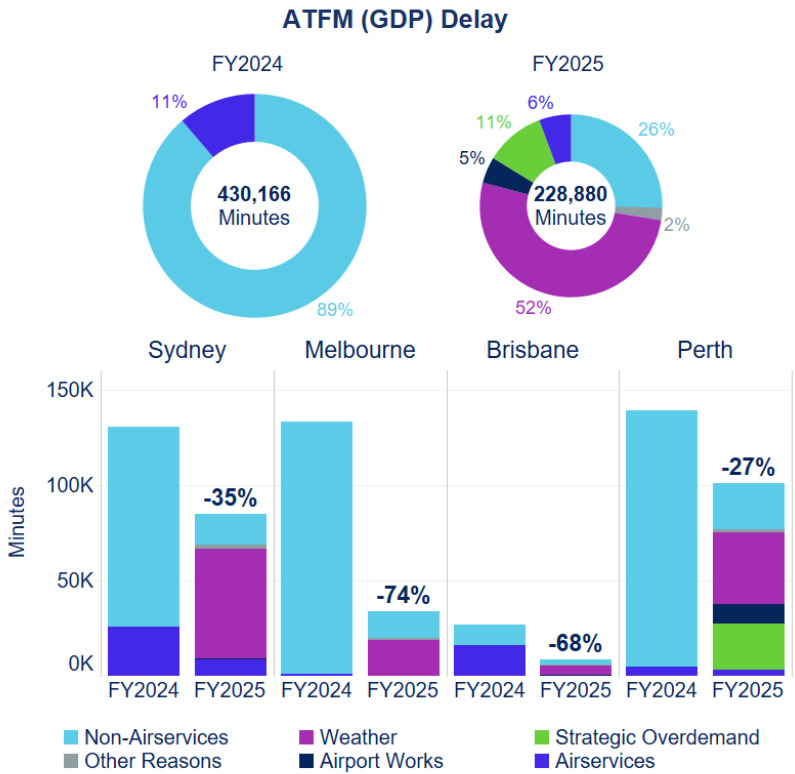


Figure 20. ATFM (GDP) delay by attribution overall (top) and by airport (bottom). Note that categories were expanded in FY2025.



Source: Airservices ODAS. GDP compliance represents the proportion of flights into an airport that departed compliant with their assigned GDP slot. * Averaged monthly.

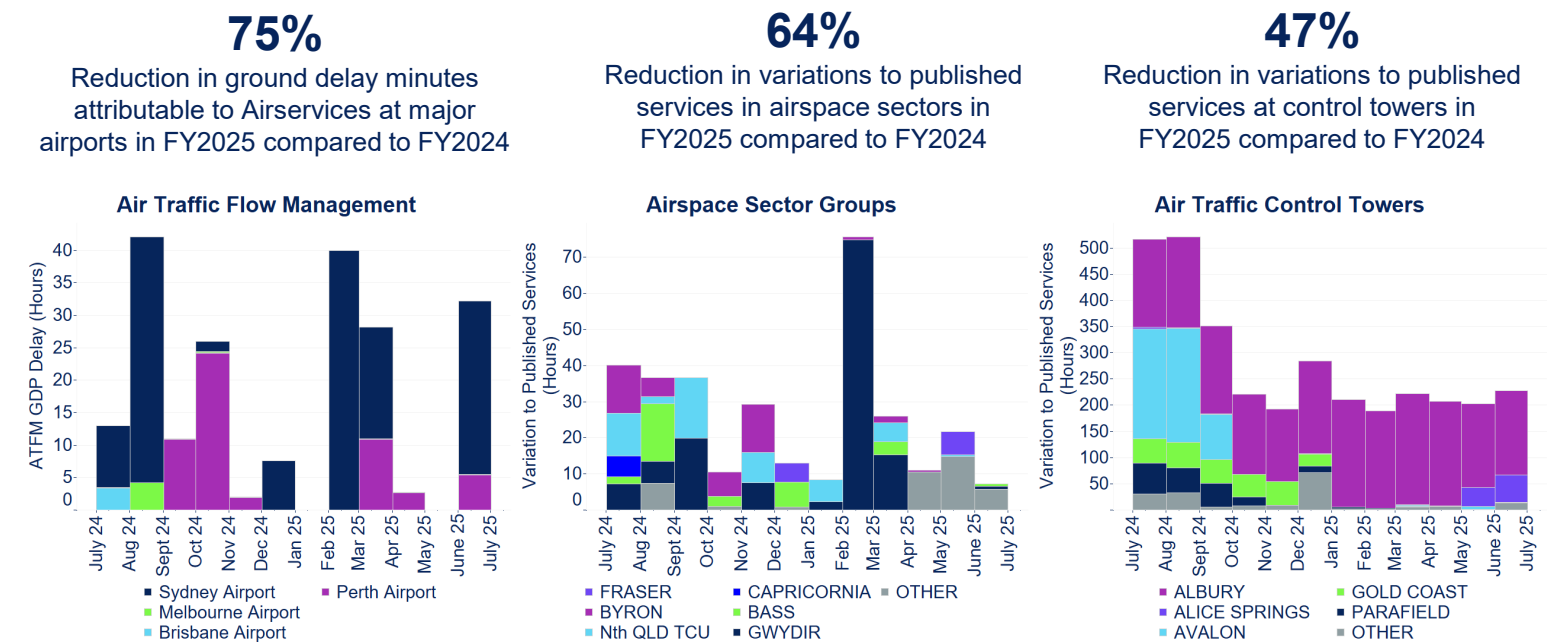
Air traffic service provision

Air traffic service performance improved in FY2025, with Airservices service variations and attribution to delays or cancellations falling by 50–75% compared to FY2024. These results reflect the progress made through the largest recruitment drive in Airservices’ history, adding 62 new air traffic controllers in FY2025 including experienced recruits. Despite having reached a full staffing complement in Sydney Tower, a staff availability challenge on 22 June resulted in 21 hours of ground delays and 14 cancelled arrivals. This highlights the need to further strengthen roster resilience and ensure service consistency. We remain focused on training, recruitment and building standby capacity in critical locations while refining processes and systems to meet ongoing traffic demand and stakeholder expectations.

Figure 21. Overall Airservices network outcomes

	FY2024	FY2025
Total Network Delays (seconds per flight)	6	2 (67% reduction)
Flights Impacted	1.6%	0.6% (63% rate reduction)
ATFM (GDP) Delays	11.2%	5.5% (51% rate reduction)
Arrival Cancellations* (proportion of all cancellations)	3.6%	1.8% (50% rate reduction)

Figure 22. 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.

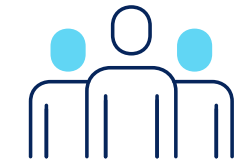
* Excludes general aviation.

Aviation Rescue Fire Fighting Service (ARFFS)

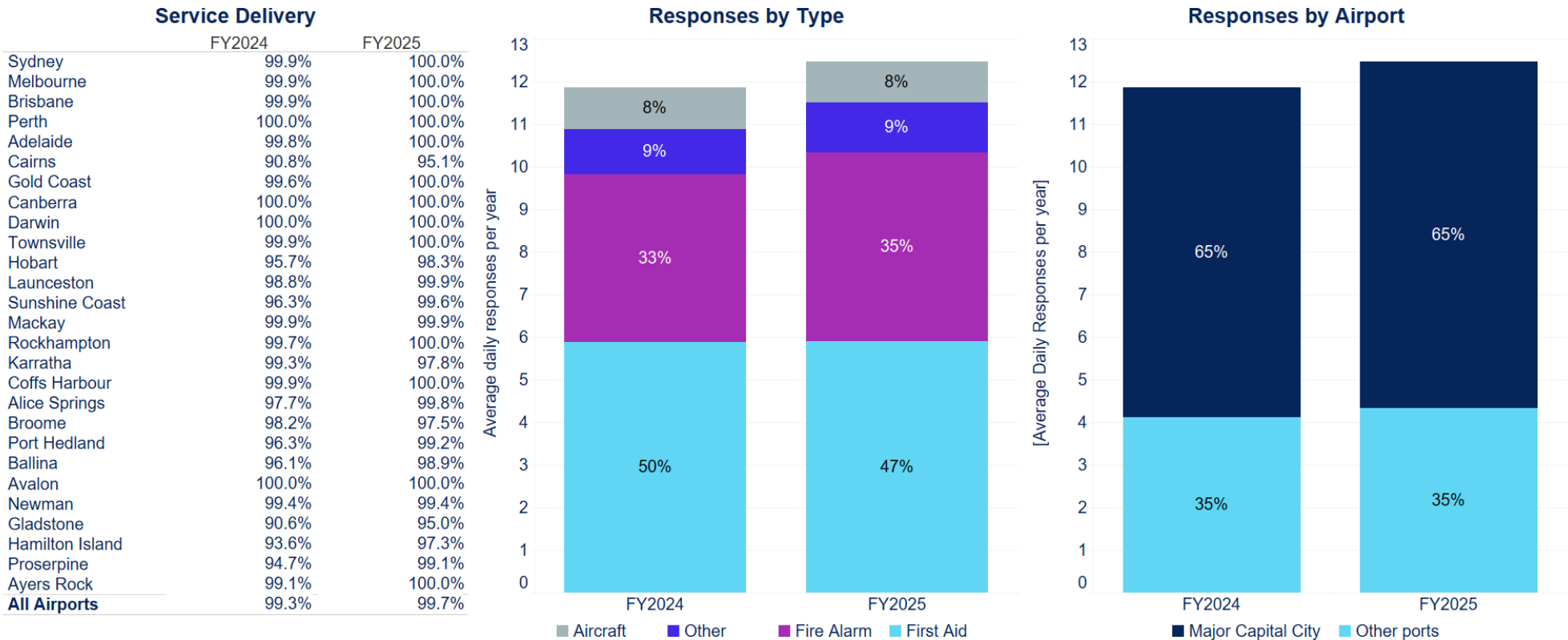
Across all 27 ARFFS locations, Airservices delivered a consistent, high-standard of coverage for critical emergency support services to aircraft and airports throughout FY2025, with a continued focus on operational readiness, service reliability, and safety outcomes.

Figure 23. ARFFS service delivery by airport and total (left) emergency responses by type (middle) and by airport category (right) for three reference periods.

ARFF Service Delivery



21
Lives saved as a
direct result of
ARFFS responses
in FY2025



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

For more information
stakeholder@airservicesaustralia.com