airservices australia

Australian Aviation Network Overview

July 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 sector has entered Financial Year 2025-2026 with strong momentum in international travel. In July, international passenger flights increased by 8% compared to the same month last year. However this is offset by a contraction in regional airline activities.

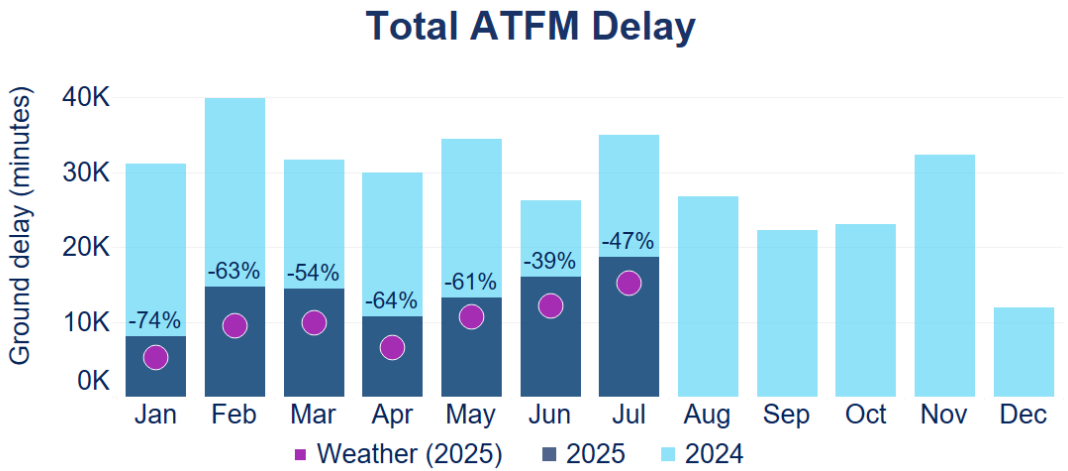
Industry on-time performance remains above 2024 levels, although adverse weather conditions this winter have impacted this trend since June. In response, cross-industry collaboration is being strengthened to enhance network decision-making processes and improve resilience to disruptions.

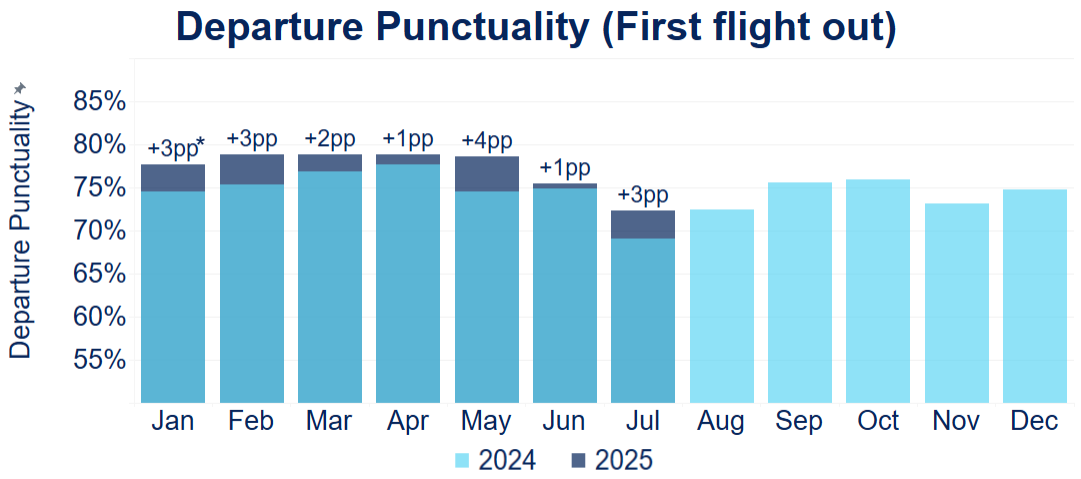
Following its successful launch at Brisbane in May, Airport Collaborative Decision Making (A-CDM) went live at Perth Airport on 18 July. Early results show an improvement in departure predictability and efficiency, with some days recording significant reductions in both peak delays and the number of flights affected by ground delays. These improvements are particularly valuable for capacity-constrained airports. Airservices continues to work closely with industry partners to monitor performance and unlock the full potential of A-CDM in driving operational benefits.

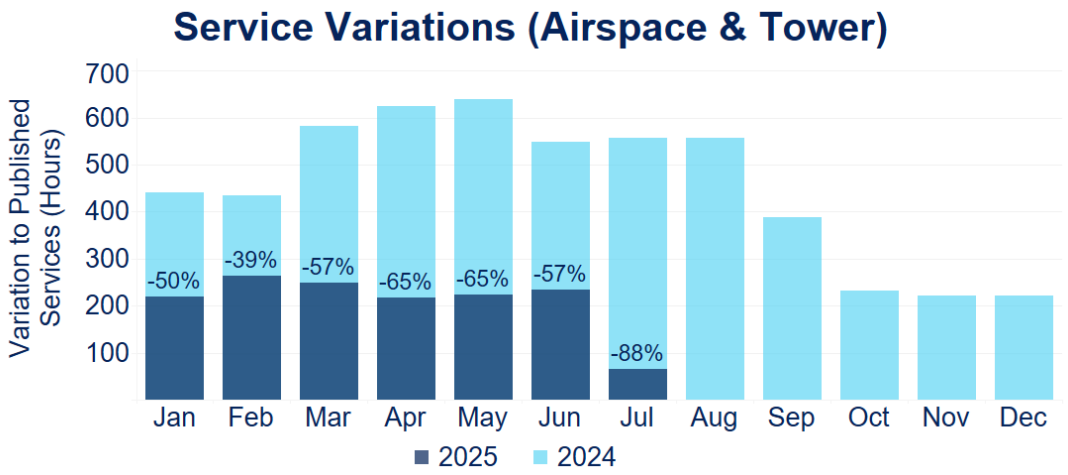
Passenger flights during the July school holidays exceeded last year's figures, reinforcing our sector's steady return to growth. We maintained a strong focus on service resilience and capacity delivery, resulting in no ground delays attributable to Airservices at major airports during this period. Airspace service variations were limited to two sector groups, and all air traffic control towers have resumed their published hours of coverage. Strengthening workforce resilience remains a key priority to ensure consistent and reliable service delivery across the network.

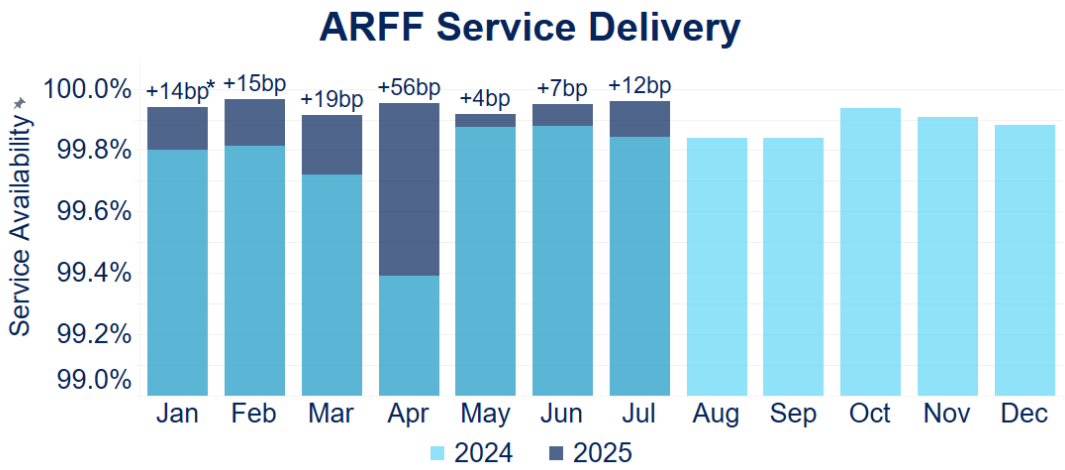
The age of aircraft averages 15 years on capital city routes, 19 years on capital city to non-capital routes and 24 years on non-capital routes. As Australian airlines renew their fleets, we are seeing newer, more efficient aircraft being deployed on busy domestic routes. However, the regional market relies heavily on ageing aircraft, highlighting challenges in fleet modernisation. It is noted that both the Qantas Group and Virgin Australia are expected to receive new aircraft in the second half of 2025.

Network performance snapshot (year-on-year comparisons)









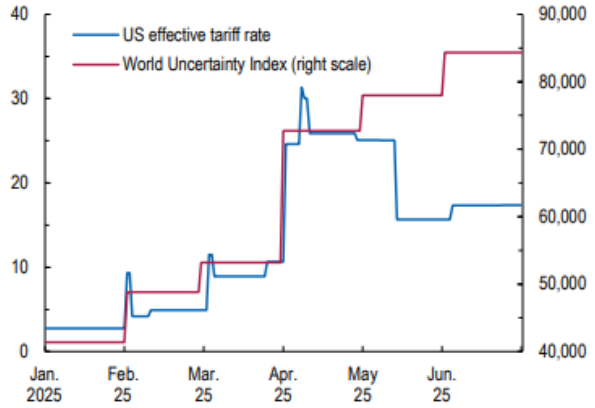
* PP refers to a percentage point change, whereas BP refers to a basis point change – the latter is used to measure smaller percentage changes.
For example, a change from 99.82% to 99.94% = 0.12 PP = 12 BP.

Economic and social trends

Economic factors

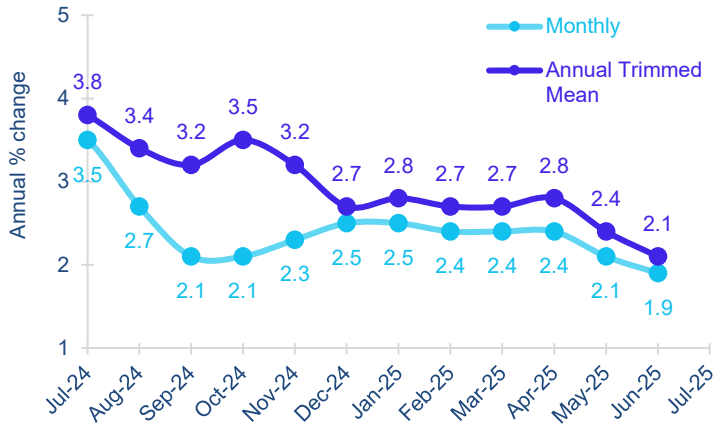
The Australian aviation industry is navigating a mixed economic environment. While easing inflation, rising consumer confidence and stabilising airfares are supporting air travel demand, ongoing uncertainties remain due to global trade volatility, fluctuating fuel prices driven by geopolitical tensions, and a weakened GDP outlook.

Figure 1. Tariffs and global uncertainty.



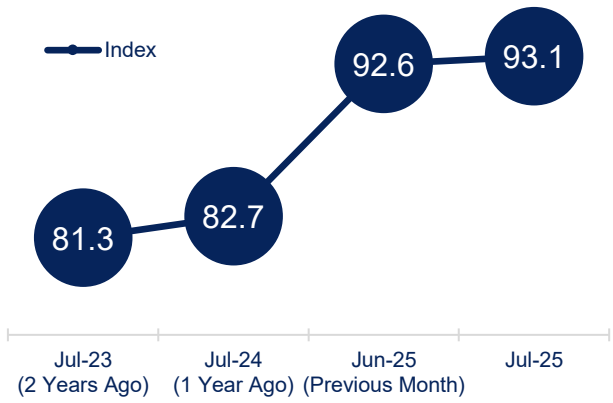
Source: IMF (website) – latest data as at 4/8/2025

Figure 2. Consumer Price Index (CPI) Indicator.



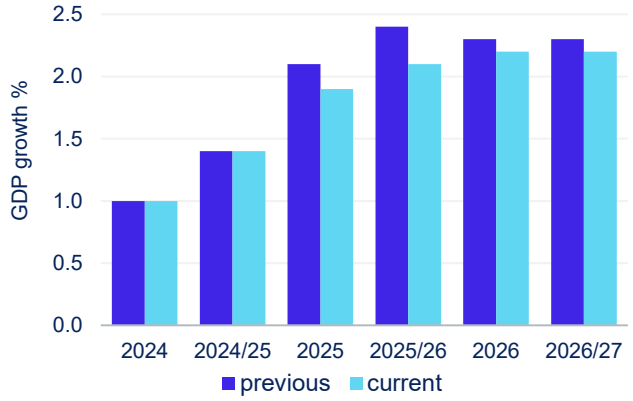
Source: ABS (website) – latest data to June 2025 as at 4/8/2025

Figure 3. Westpac Melbourne Institute Consumer Confidence.



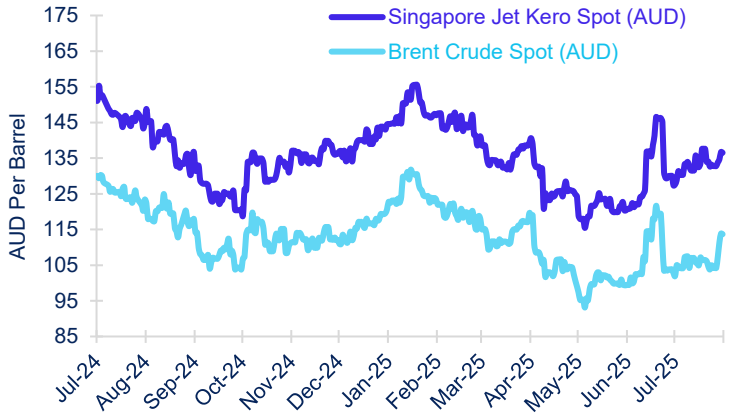
Source: Westpac Economics (website) – latest data as at 4/8/2025

Figure 4. Australia GDP growth outlook.



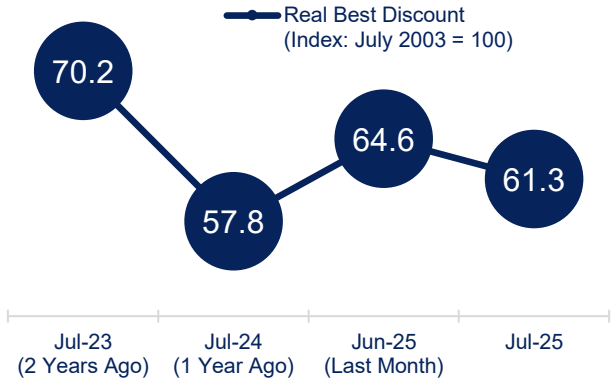
Source: RBA (website) – latest data as at 4/8/2025.
2024 value is historical, all others forecast (as at May 2025).

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



Source: Bloomberg – latest data as at 4/8/2025

Figure 6. Domestic airfares (real best discount).



Source: BITRE (website) – latest data to July 2025

Social factors

In July 2025, engagement with communities and stakeholders progressed for key flight path initiatives supporting the establishment of Western Sydney International Airport and the Noise Action Plan for Brisbane. The recent rise in aircraft noise complaints reflects ongoing community sensitivity, particularly as seasonal changes shift operations to new areas. Our focus remains on fostering public understanding of aircraft operations and the operational drivers for changes to meet the travelling public demand. The expansion of user-preferred routes, particularly along key Asia-Pacific corridors, is contributing to emissions reductions and broader sustainability goals.

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

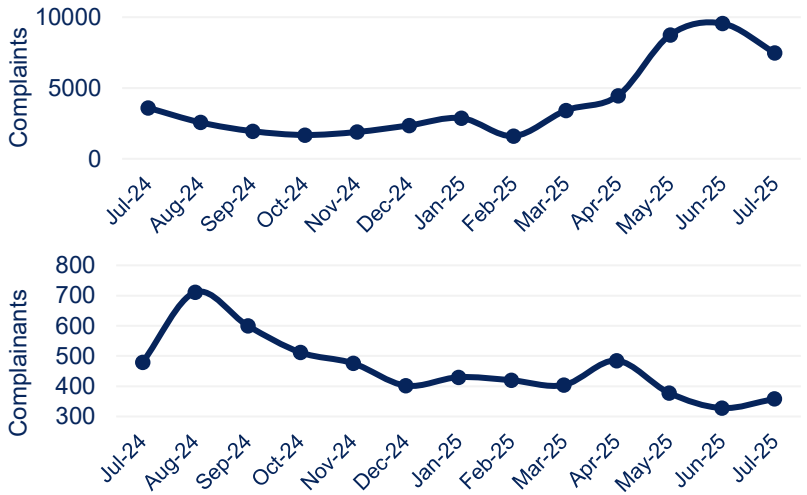


Figure 8. Aircraft noise complainants total and trend by location (July 2025 and July 2024, and change).

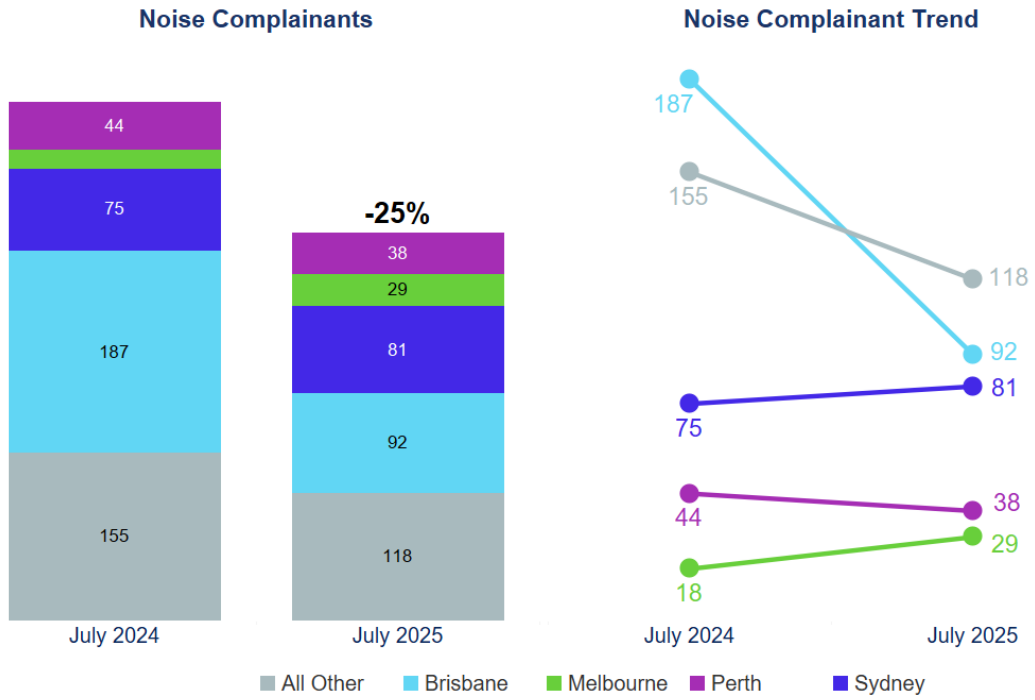
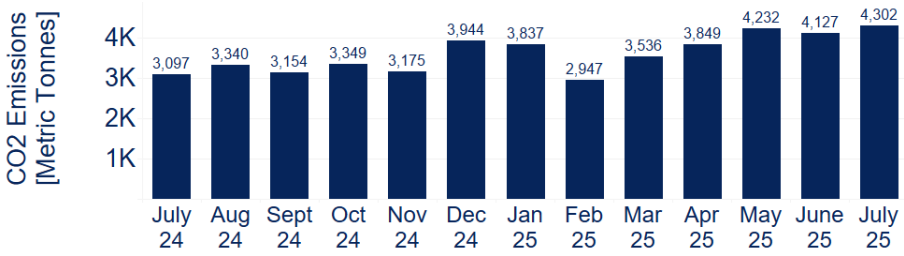


Figure 9. CO_2 emissions savings from optimised User Preferred Routes (UPR) per month.



Source: Airservices Noise Complaints and Information Service (NCIS) and Airservices ODAS. CO_2 emissions savings from UPR are across oceanic and cross-continental airspace.

Australian aviation and regional context

State of Australian aviation growth

In July 2025, airline flights across the Australian aviation network held steady compared to the same month last year. Strong international demand during the July school holiday period has offset a decline in the domestic regional sector.

Figure 9. Average daily airline flights growth.

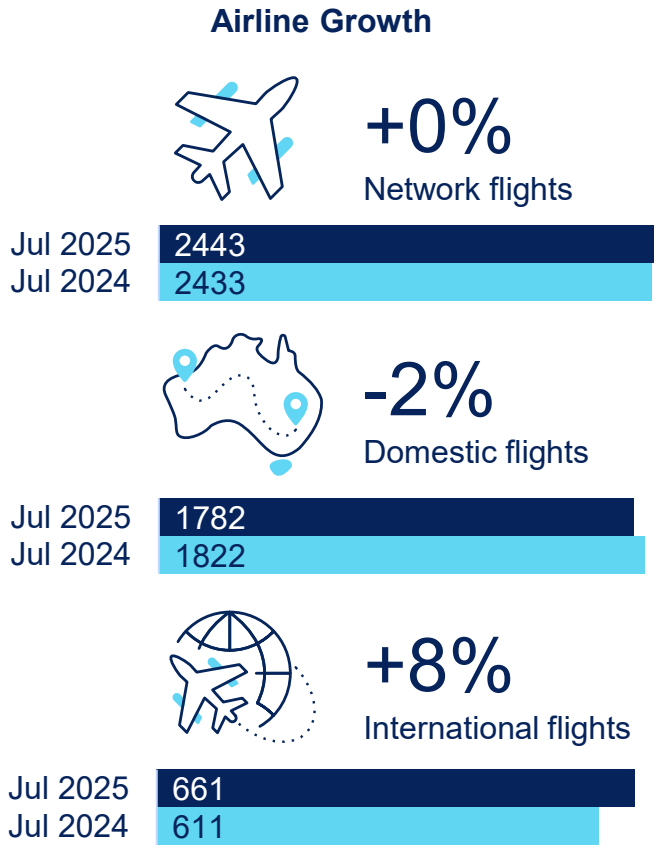
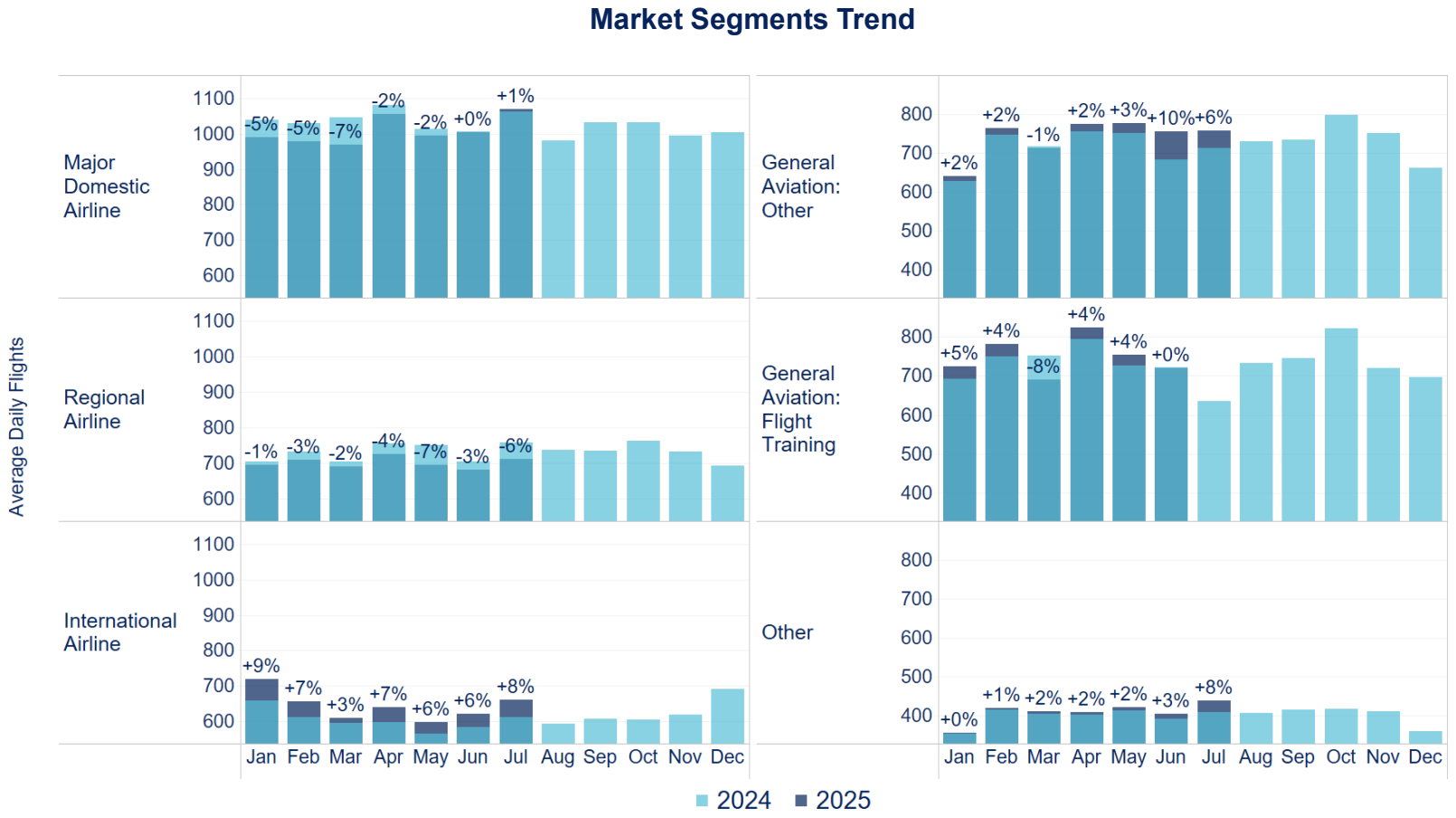


Figure 10. Monthly year-on-year growth in average daily flights across market segments.

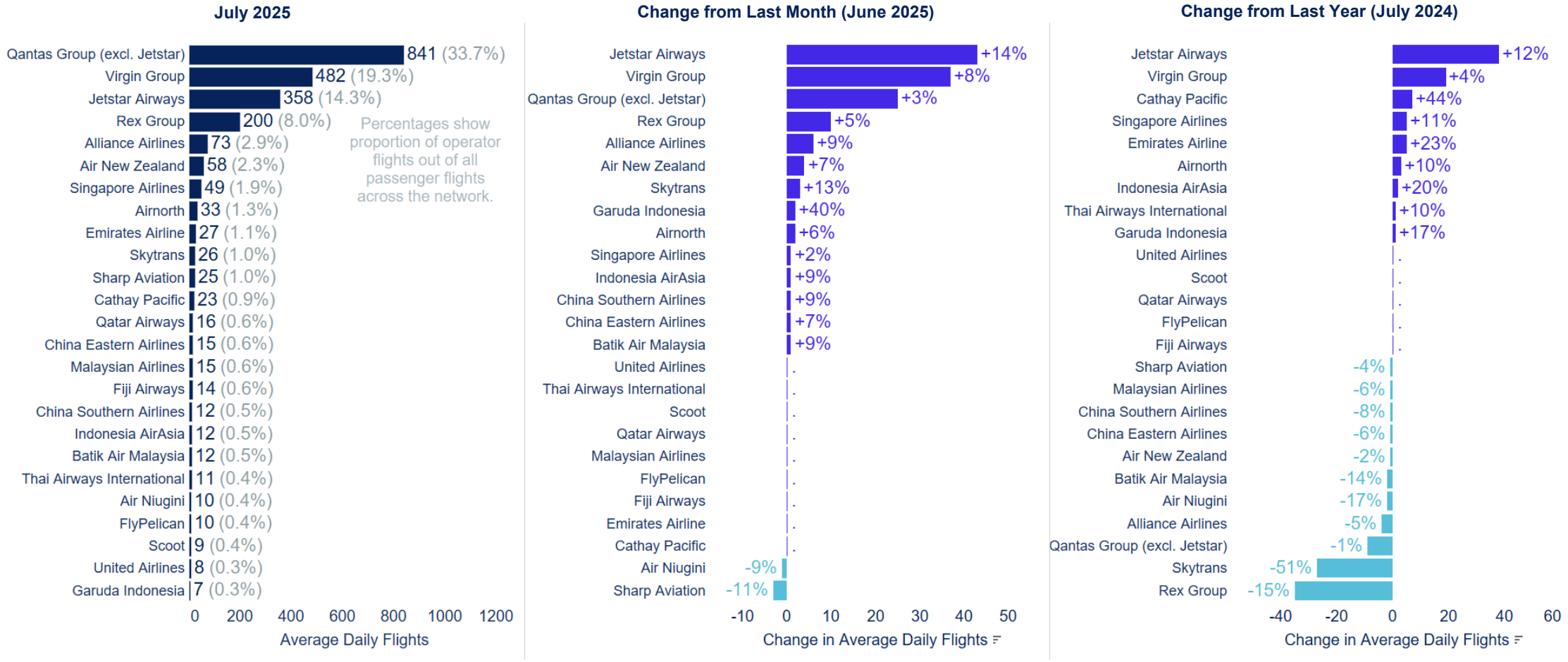


Source: Airservices ODAS (excludes helicopters). *General Aviation: Flight Training* is one month in arrears.

Top aircraft operators

Growth is being led by major hub airlines both domestically and across Asia and the Middle East, particularly those with the fleet capacity to capture travel demand. In contrast, smaller regional operators face ongoing challenges such as fluctuating demand, ageing fleet and workforce deployment constraints especially in remote areas.

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

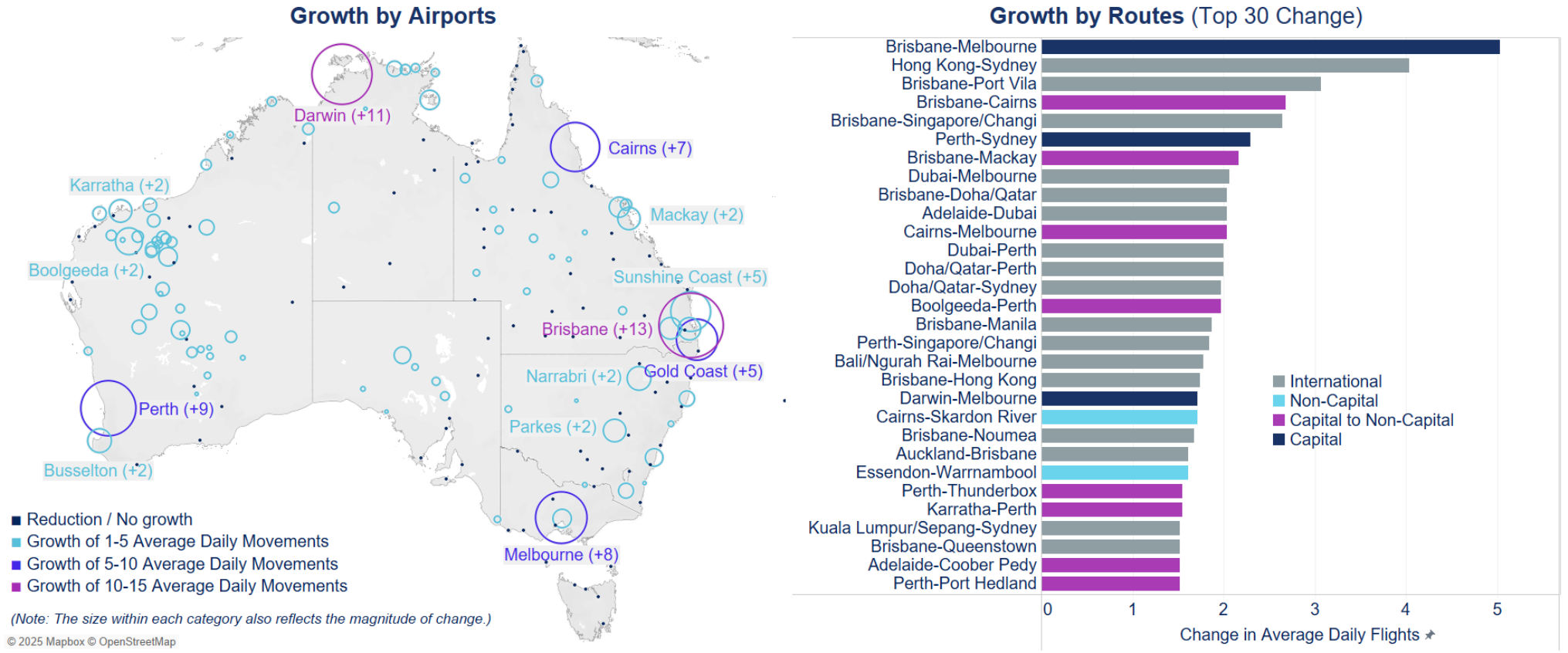


Source: Airservices ODAS, including airline flights only (excluding all non-scheduled operations). Only top 25 airlines by flights are shown.
Flights operated on wet-lease arrangements are counted towards the operators with the assigned callsigns.

Domestic airport network

Across the domestic airport network, we are seeing strong growth in areas that support international flights, popular domestic leisure routes in northern Queensland and regional services for fly-in fly-out operations servicing the mining sector in Western Australia.

Figure 12. Growth in airline activities at domestic airports and on routes (July 2025 vs July 2024) by change in average daily movements (left) and change in average daily flights (right).

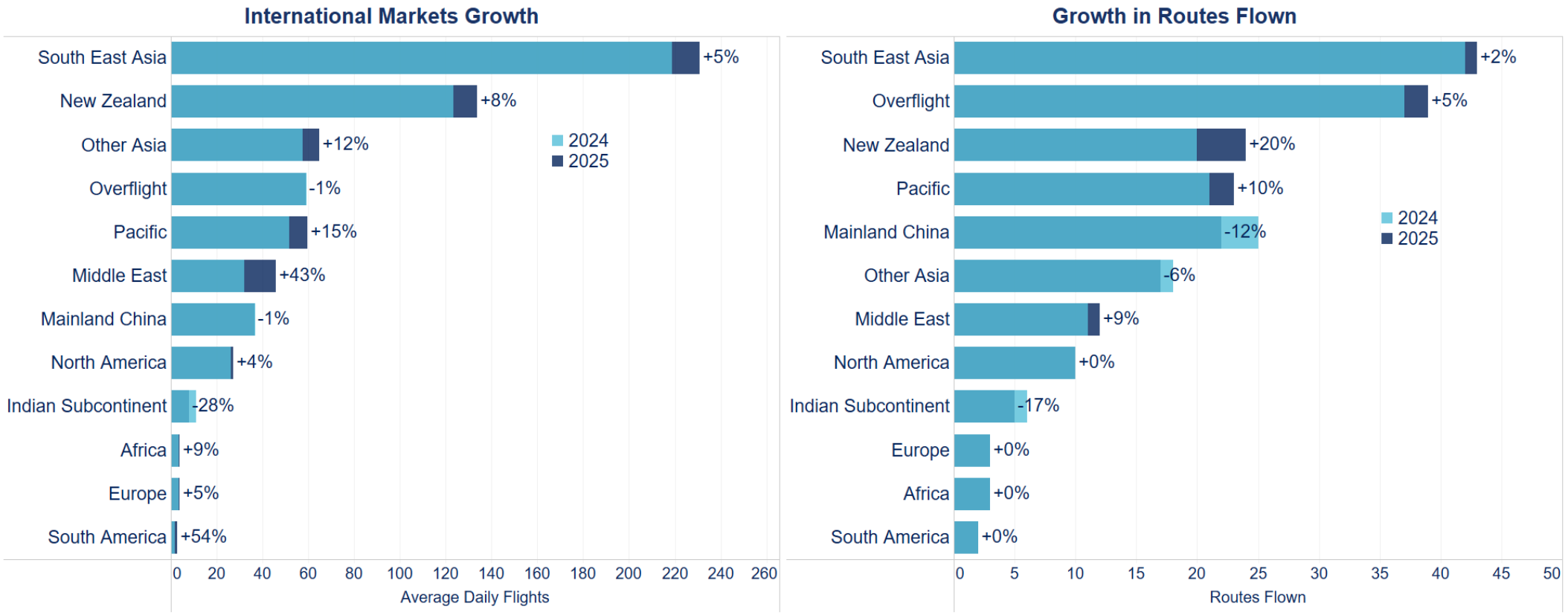


Source: Airservices ODAS, including airline flights only (excluding all non-scheduled operations).
Traffic growth at airports is based on average daily movements (i.e. either a departure or an arrival), whereas growth on routes is based on average daily flights.
Only the top 30 routes by change in average daily flights are displayed.

International markets

Recent growth in international traffic is supported by new airline partnerships and expansion into New Zealand and the Pacific, aligning with the Australian Government's focus on regional trade and tourism. Tourism campaigns are expected to drive continued demand growth, including the recent launch of Tourism Australia's *Come and Say G'Day* campaign in China which promotes Australia as a premier long-haul travel destination.

Figure 13. Growth in international markets for July 2025 and comparison to July 2024 by average daily flights (left) and routes flown (right).

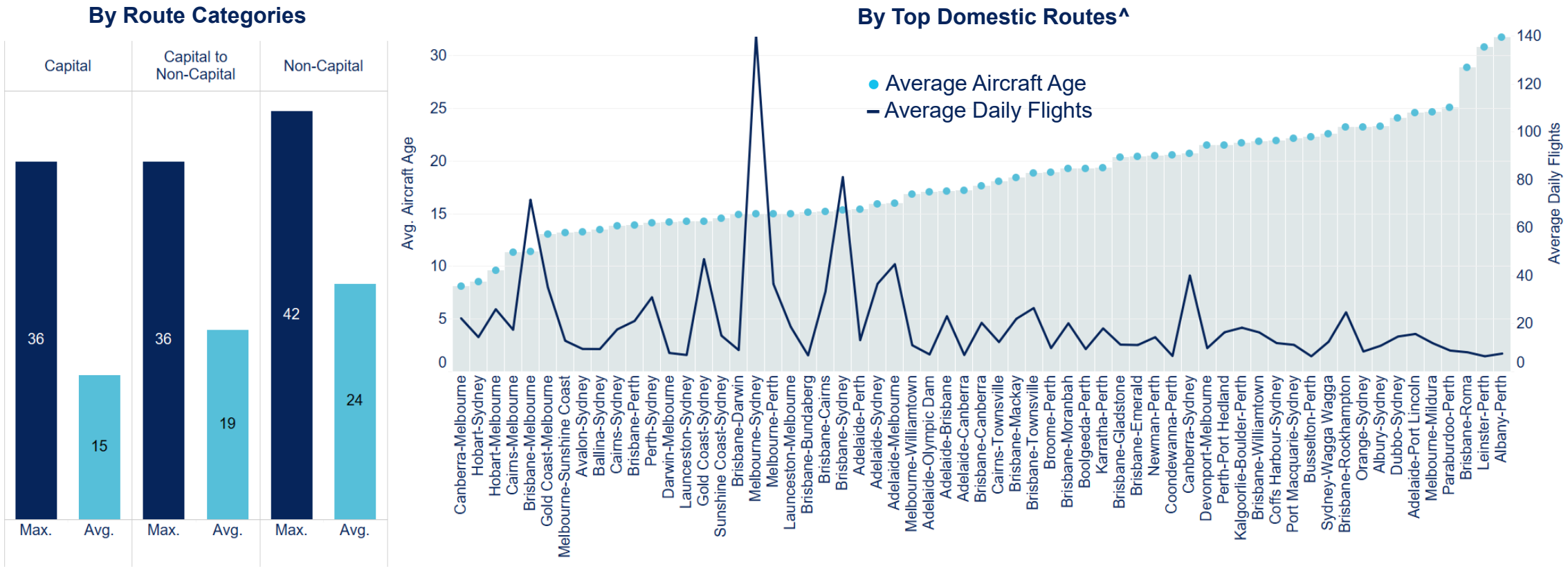


Source: Airservices ODAS, including airline flights only (excluding all non-scheduled operations).
For multi-leg flights, legs that start and end outside Australian airspace are not included.

Network fleet

After several years of delays in the delivery of aircraft and global supply chain issues, Qantas Group and Virgin Australia are expected to receive new aircraft in the second half of 2025*. As Australian airlines renew their fleets, we are seeing newer, more efficient aircraft being deployed on busy domestic routes. However, the regional market relies heavily on ageing aircraft, highlighting challenges in fleet modernisation.

Figure 14. Age of aircraft operated by airlines on domestic routes in July 2025.



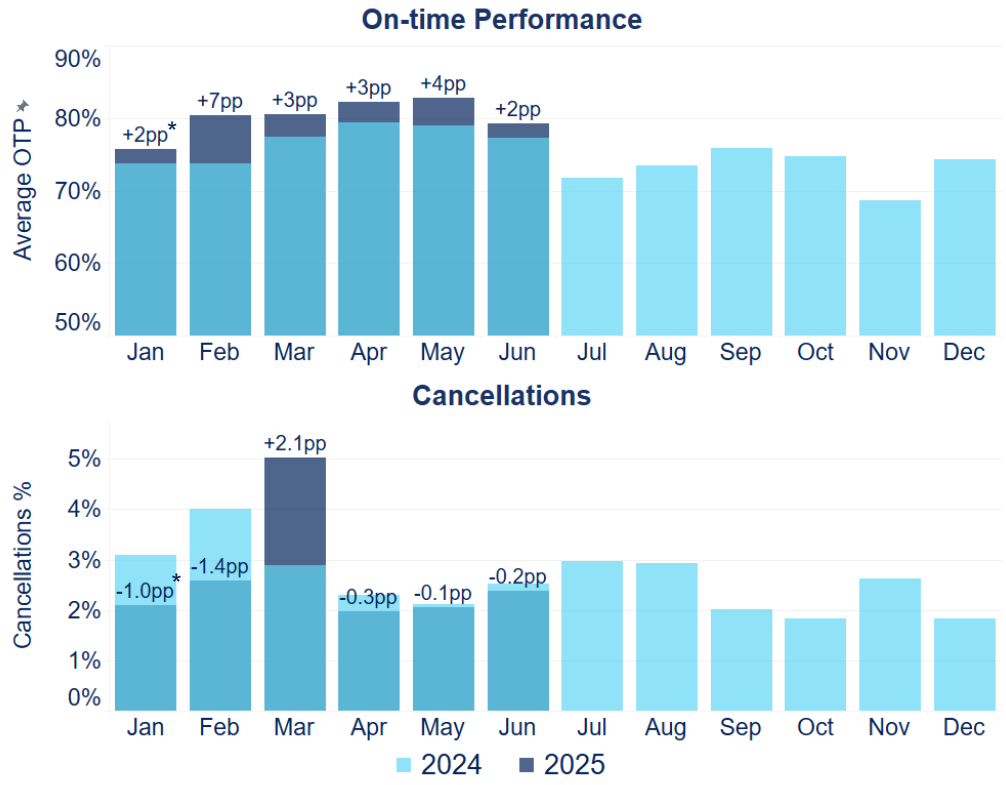
*Source: Australian Competition & Consumer Commission (ACCC) Domestic Airline Competition in Australia report August 2025 (website).
^Due to the large number of all routes, only routes operated by airlines with more than 200 flights in July 2025 are shown on right to indicate overall fleet age (excluding all non-scheduled operations).
The data sources for Figure 14 consist of Airservices ODAS and Centre for Aviation Fleet (CAPA) data, as of 4 August 2025.

Australian aviation network performance

Industry performance

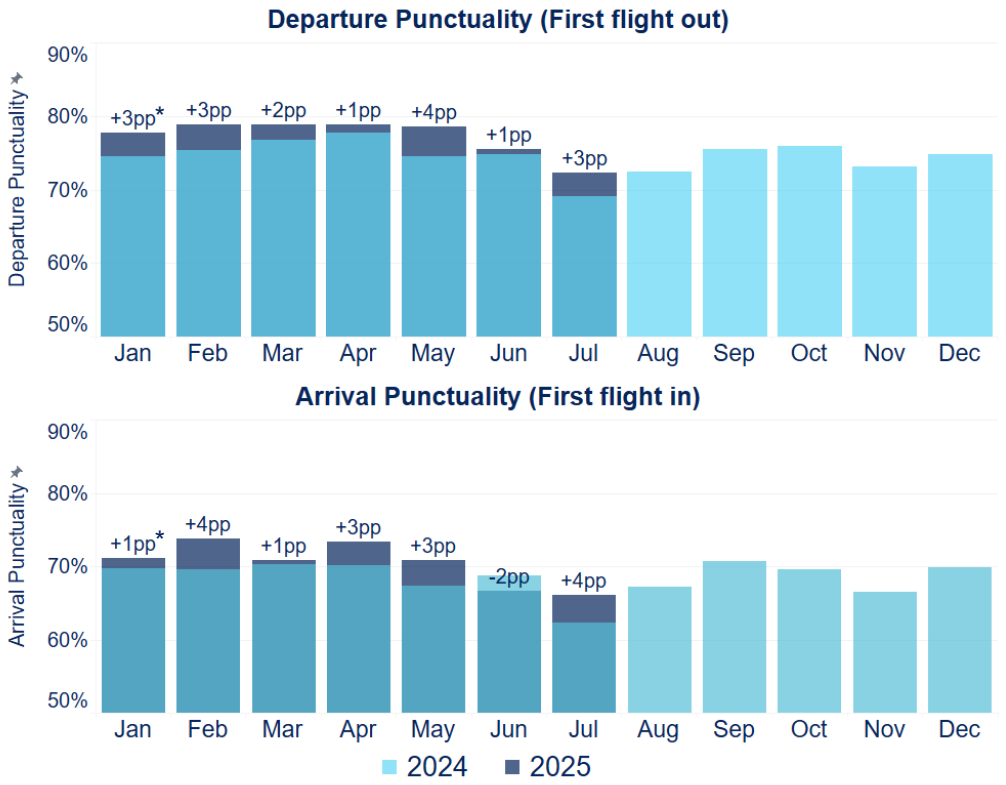
Industry on-time performance remains above last year's levels, but has declined since June, largely due to severe weather disruptions. Strengthening the sector's resilience will require coordinated efforts, including collaborative scenario planning and aligned responses to alternative operational plans on the day.

Figure 15. Total industry OTP^ and cancellations up to June 2025.



Source: BITRE (website).
Data available up to June 2025 based on latest BITRE data release.
March 2025 performance was impacted by Tropical Cyclone Alfred.
^Average of departure and arrival OTP.

Figure 16. First wave punctuality, with lead indicator for July 2025.



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.

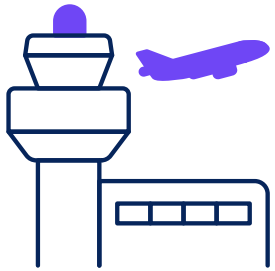
* PP refers to a percentage point change. For example, a change from 50% to 51% = 1 PP.

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

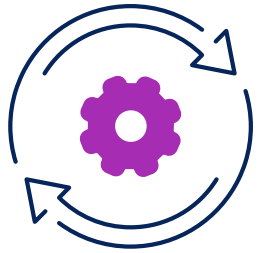
Strategic slot allocation is managed by Airport Coordination Limited (ACL) for Sydney and Capacity Optimisation Group (COG) for Melbourne, Brisbane and Perth – upon which airline **flight schedules** are then based. Airlines send their final flight schedules to Airservices Network Operations Management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

Weather was the predominant constraint in July, contributing to 98% total ATFM delays at Sydney due to strong crosswinds, and 67% at Perth impacted by low visibility conditions. Despite these challenges, the aviation industry demonstrated its capacity to learn and adapt collaboratively, using nightly senior oversight meetings to improve network decision-making ahead of peak days with significant forecast weather conditions. There were no ATFM delays attributable to Airservices, reflecting the embedded resilience measures to safeguard school holiday periods.

Figure 17. Key Ground Delay Program (GDP) metrics.

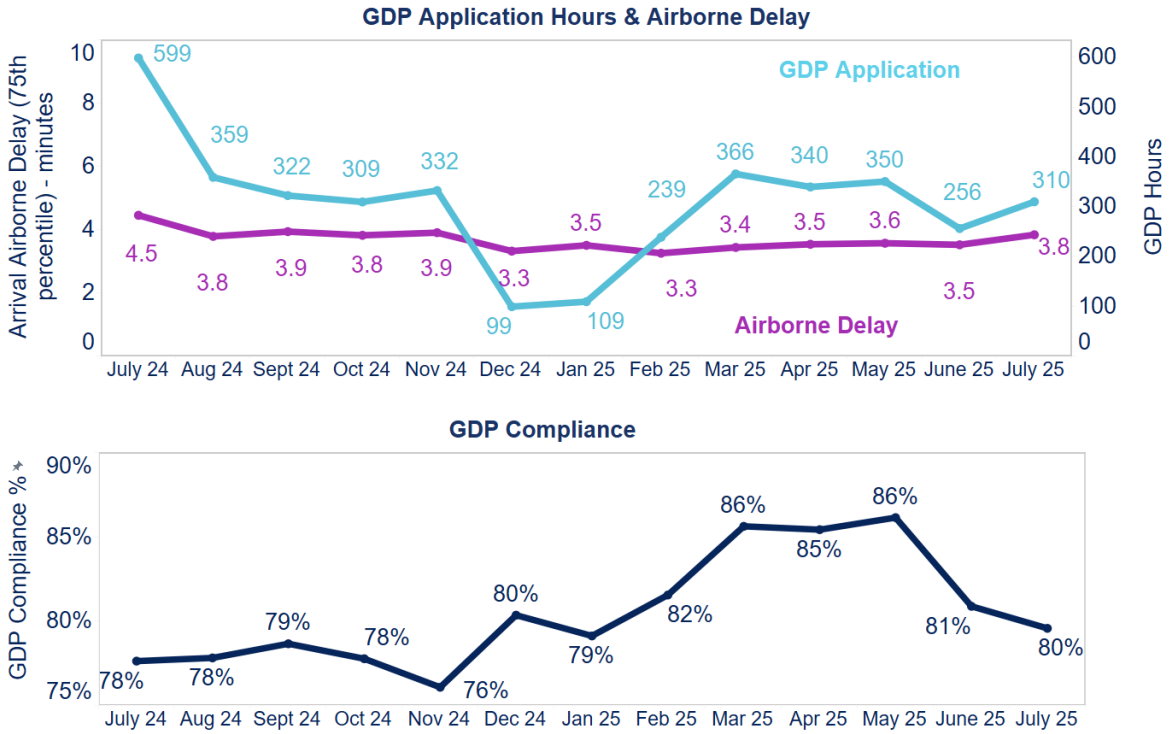
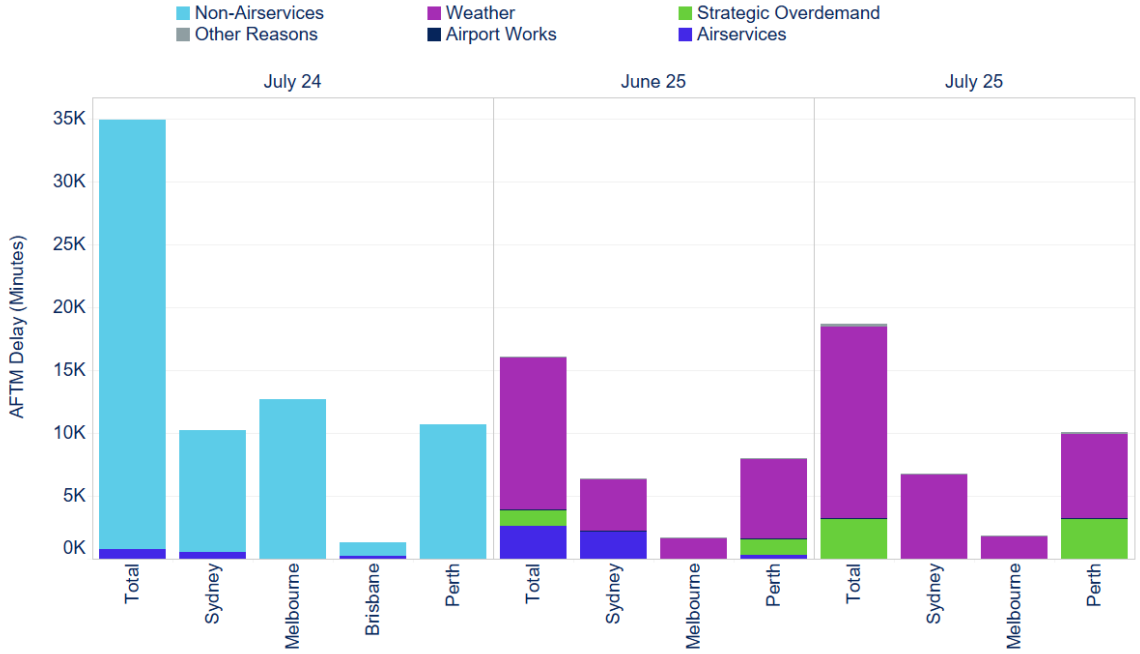


Figure 18. ATFM (GDP) delay by attribution at airports.
Note that categories were expanded in FY2025.



Source: Airservices ODAS.

GDP compliance represents the proportion of flights into an airport that departed compliant with their assigned GDP slot.

Airport Collaborative Decision Making (A-CDM)

Airport Collaborative Decision Making (A-CDM) went live at Perth Airport on 18 July, following the successful implementation at Brisbane Airport in May. Adoption and compliance to the new procedures to date has been excellent amongst all operators at these airports. At Perth, early results show an improvement in departure predictability and efficiency, with some days recording significant reductions in both peak delays and the number of flights affected by ground delays. Building on these successes and operational insights, preparatory work is underway for the upcoming rollouts at Sydney Airport (6 September) and Melbourne Airport (18 October).

Figure 19. TOBT compliance – July 2025.

Compliance with A-CDM Procedures: Target Off Block Time (TOBT)

Perth Airport

80%

TOBT compliance since go-live has been 80% to the end of July, at European benchmarks

Brisbane Airport

83%

TOBT compliance at Brisbane remains high at 83% consistent with June

Figure 20. 'Wheels-up' predictability – July 2025.

Take-off time predictability at ready call

Perth Airport

71%

Take-off time predictability indicates how accurate A-CDM predicts wheels-up time when a flight called ready, given departure demand and any congestion at the surface

Brisbane Airport

76%

Take-off time predictability has been high at Brisbane, given typical imbalance between capacity and demand for departures

A-CDM benefits monitoring*

Greater visibility and **predictability** of pushback times

Improved **recovery** post adverse events such as weather disruptions

Improved departure management; more dynamic and equitable use of available **capacity** on the day of operations

Reduced taxi-out **delays**

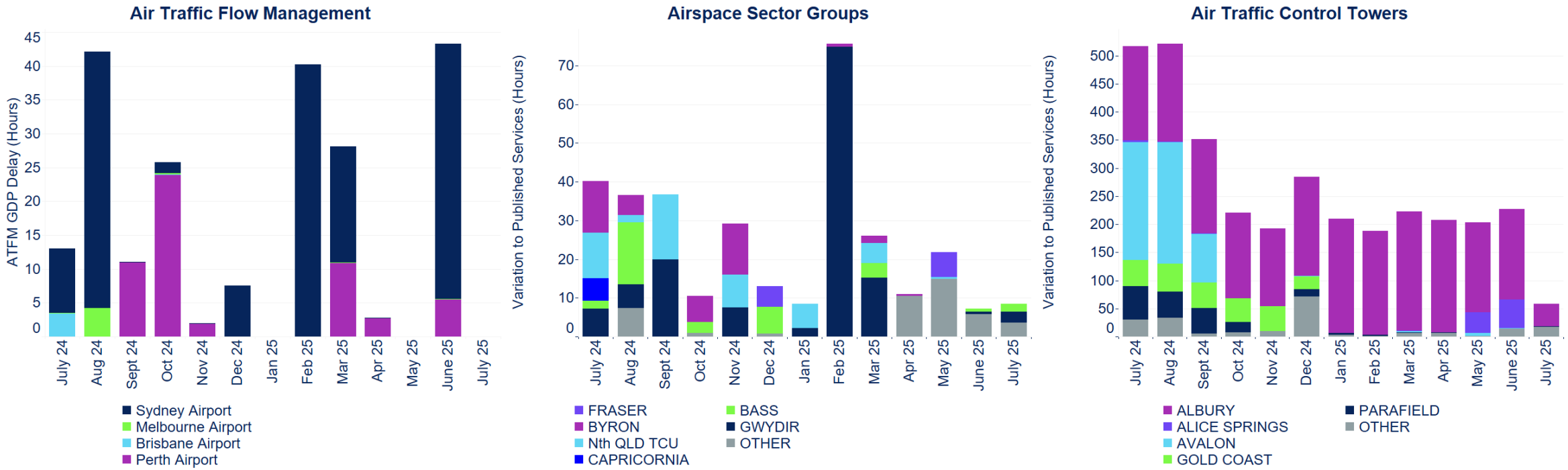
Sustainability; including fuel and emissions savings

* Airservices is working with industry partners to confirm the approach to A-CDM benefits monitoring.

Air traffic service provision

During the July school holiday period, which saw a 1% increase in traffic compared to the same period last year, we maintained a strong focus on service resilience and capacity delivery to meet heightened demand. As a result, there were no Air Traffic Flow Management (ATFM) delays attributable to Airservices across Sydney, Melbourne, Brisbane, or Perth. Variations in airspace services were confined to two sector groups during this time. All air traffic control towers have now resumed their published hours of coverage. Nonetheless, strengthening operational resilience to ensure uninterrupted service delivery remains a key priority.

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.

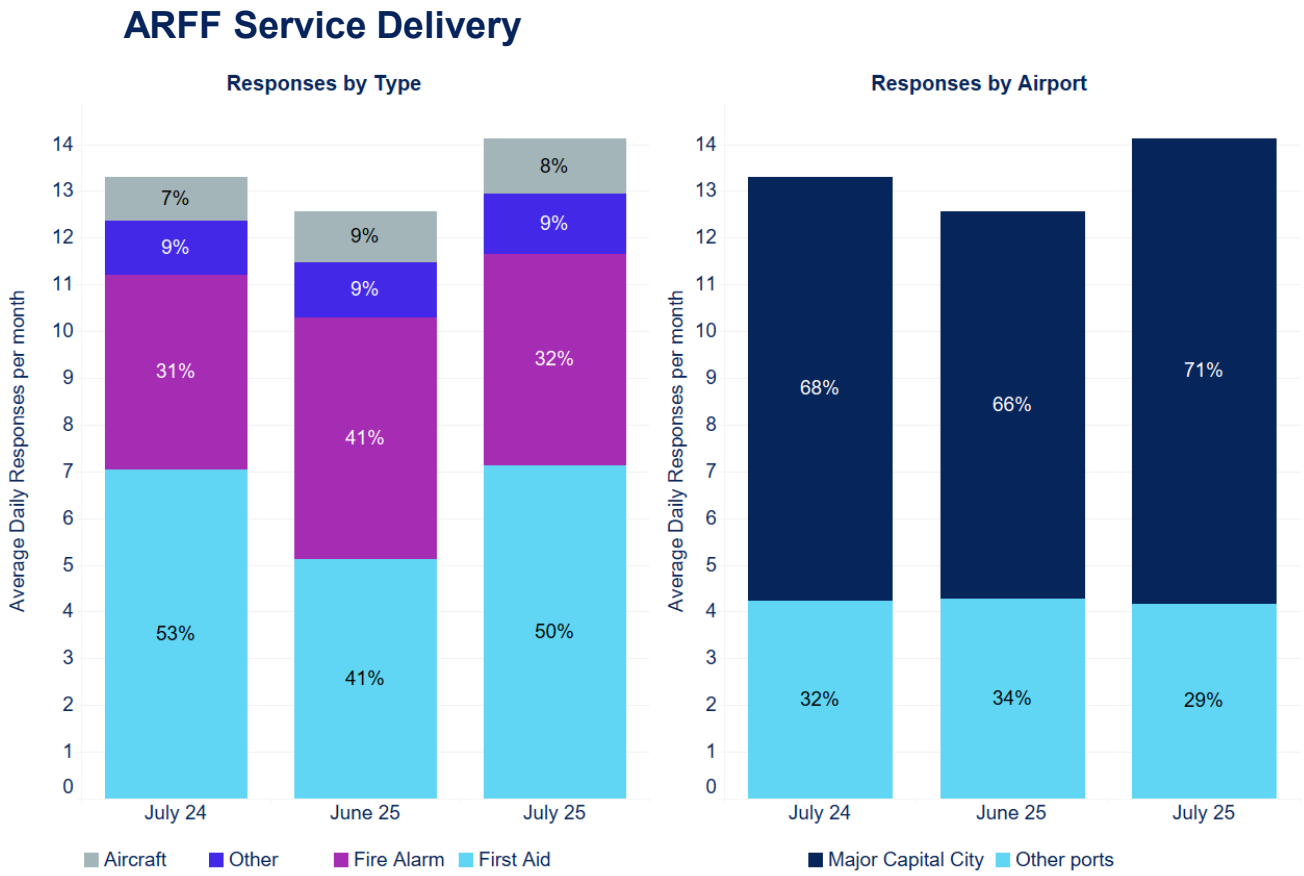
Aviation Rescue Fire Fighting Service (ARFFS)

In July, Aviation Rescue Fire Fighting Services (ARFFS) service availability was 99.96% across 27 airports. Across all locations, we continue to maintain 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 airport category (right) for three reference periods.

Service Delivery

Location	July 2024	June 2025	July 2025
Adelaide	99.87	99.98	100.00
Alice Springs	100.00	100.00	100.00
Avalon	100.00	100.00	100.00
Ayers Rock	100.00	100.00	100.00
Ballina	99.35	100.00	100.00
Brisbane	100.00	100.00	100.00
Broome	93.66	99.43	99.46
Cairns	100.00	100.00	100.00
Canberra	100.00	100.00	100.00
Coffs Harbour	100.00	100.00	100.00
Darwin	100.00	100.00	100.00
Gladstone	99.41	89.80	96.38
Gold Coast	99.97	100.00	100.00
Hamilton Island	99.68	96.28	99.40
Hobart	96.06	100.00	100.00
Karratha	95.90	100.00	98.25
Launceston	100.00	100.00	100.00
Mackay	100.00	100.00	99.77
Melbourne	100.00	100.00	100.00
Newman	100.00	99.18	100.00
Perth	100.00	100.00	100.00
Port Hedland	100.00	100.00	100.00
Proserpine	96.73	99.37	96.01
Rockhampton	100.00	100.00	100.00
Sunshine Coast	97.66	100.00	100.00
Sydney	100.00	100.00	100.00
Townsville	100.00	100.00	100.00
All Airports	99.84	99.95	99.96



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