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Australian Aviation Network
Overview

August 2025

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Executive Summary

In August 2025, the Australian aviation network returned to seasonal levels following the July school holiday peak with passenger demand and load factors remaining strong. In contrast, flight volumes have seen a declining trend in 2025, reflecting a shift toward optimising existing fleet capacity amid aircraft supply constraints.

The growth in network carriers contrasts with reduced operations from regional airlines facing aging fleet and structural market challenges. General aviation, particularly flight training schools, continued its steady recovery which is critical for aviation workforce development and regional connectivity.

On-time performance stayed ahead of 2024 benchmarks but has been impacted by severe winter weather conditions such as fog and strong winds. Industry workshops in August focused on refining scenario planning, disruption response, collaborative decision-making and communication ahead of the upcoming spring holiday and major events season.
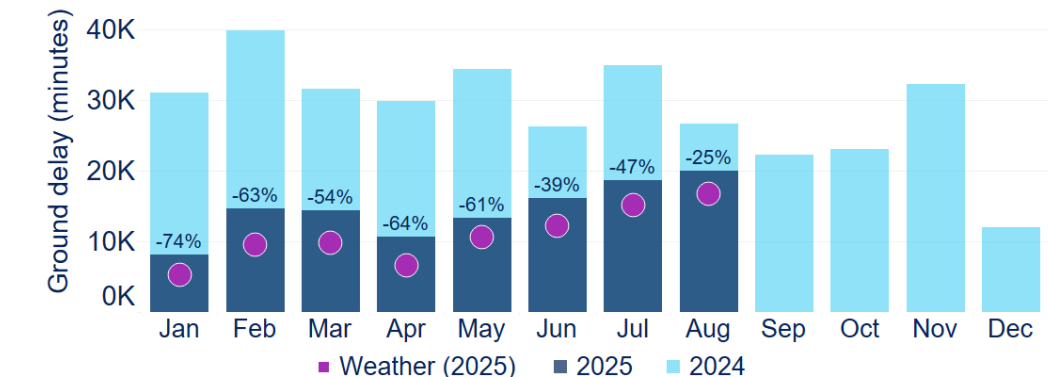
Ground delays fell 25% year-on-year, with the Ground Delay Program (GDP) compliance reaching 85%. Strong industry adherence to Airport Collaborative Decision Making (A-CDM) procedures at Brisbane and Perth is unlocking efficient departure operations enabled by real-time situational awareness. We are working closely with airports and airlines to harness data related to aircraft turnaround and gate processes to further quantify A-CDM benefits.

Airspace service variations recorded their lowest level since January 2022. However, unplanned staff absences during this winter season have resulted in some service aberrations in Sydney and metropolitan aerodromes. Workforce resilience efforts including active recruitment, training and delivering standby staffing arrangements continue to be progressed to ensure reliable and consistent services across the network.

Embedding a community-by-design approach to balance airport growth with aircraft noise management and public trust remains a priority across the aviation sector. This commitment is evident in the increased use of Simultaneous Opposite Direction Parallel Runway Operations (SODPROPS) at Brisbane Airport this year, when weather and operational conditions have allowed, reducing flights over residential areas particularly during weekend daytime and weekday evening periods.

Network performance snapshot (year-on-year comparisons)

Total ATFM Delay

Ground delay (minutes)

- Jan: -74%
- Feb: -63%
- Mar: -54%
- Apr: -64%
- May: -61%
- Jun: -39%
- Jul: -47%
- Aug: -25%

Legend: Weather (2025), 2025, 2024

Departure Punctuality (First flight out)

- Jan: +3pp*
- Feb: +3pp
- Mar: +2pp
- Apr: +1pp
- May: +4pp
- Jun: +1pp
- Jul: +3pp
- Aug: +2pp

Legend: 2024, 2025
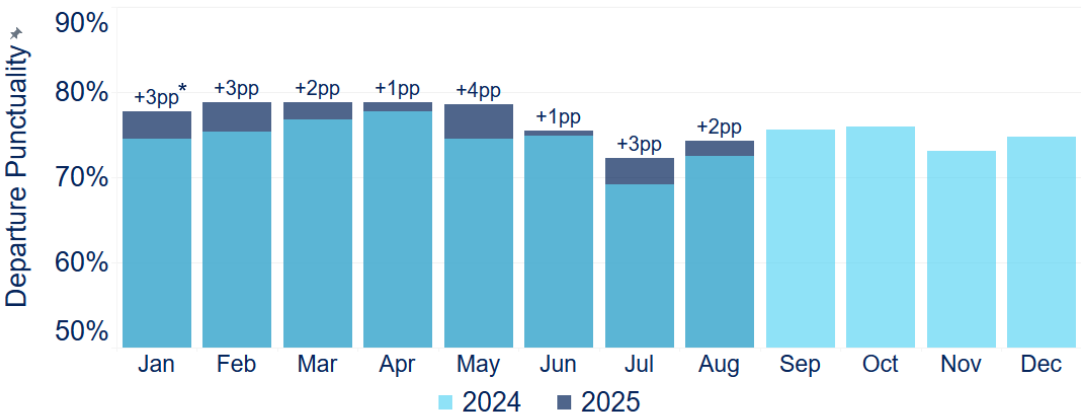
Service Variations (Airspace & Tower)

Variation to Published Services (Hours)

- Jan: -50%
- Feb: -39%
- Mar: -57%
- Apr: -65%
- May: -65%
- Jun: -57%
- Jul: -88%
- Aug: -86%

Legend: 2025, 2024

ARFF Service Availability

Service Availability

- Jan: +14bp*
- Feb: +15bp
- Mar: +19bp
- Apr: +56bp
- May: +4bp
- Jun: +7bp
- Jul: +12bp
- Aug: +12bp

Legend: 2024, 2025
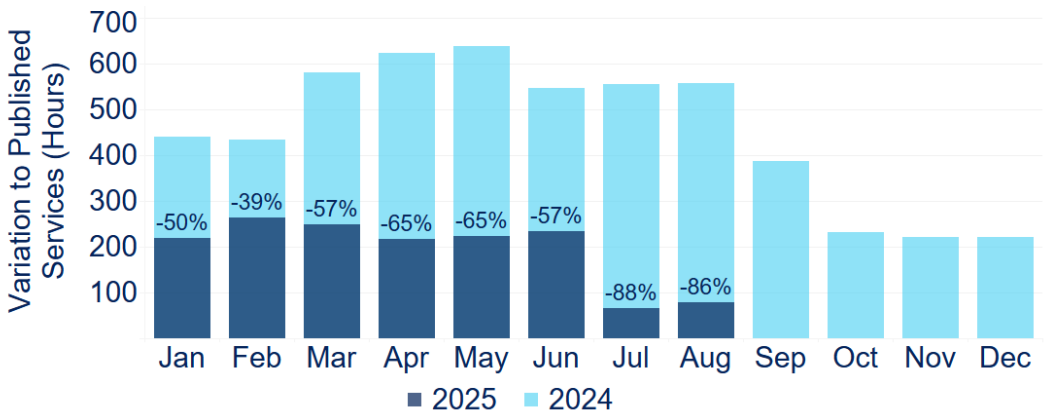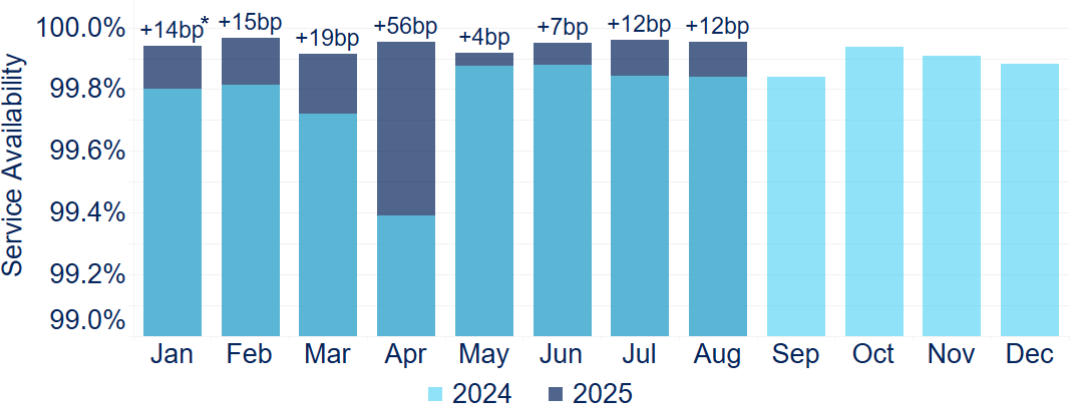
*PP refers to a percentage point change, whereas BP refers to a basis point change – the latter is used to measure smaller percentage changes. For example, a change from 99.82% to 99.94% = 0.12 PP = 12 BP.
ARFF service availability is based on aircraft movements that received applicable category of ARFFS coverage.

Economic and social trends

Economic factors

Australia's aviation network is benefiting from improving economic conditions, including a three-year high in consumer sentiment, a lower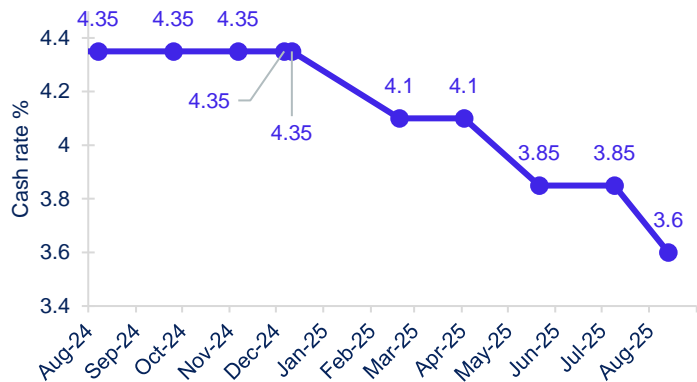 cash rate, and stronger-than-expected GDP growth. These indicators point to a favourable outlook for both leisure and business travel, a view echoed in recent financial market updates from major airlines and travel agencies. However, some risks remain such as global trade uncertainty and productivity challenges.

Figure 1. RBA cash rate.

Source: RBA (website) – latest data as at 8/9/2025

Figure 2. Consumer Price Index (CPI) Indicator.
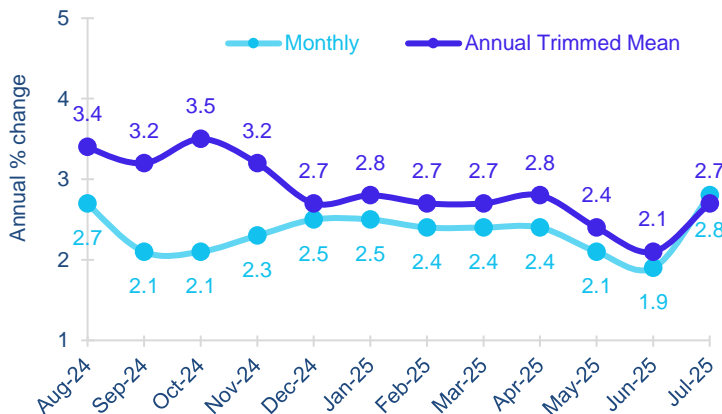
Source: ABS (website) – latest data to July 2025 as at 27/8/2025

Figure 3. Westpac Melbourne Institute Consumer Confidence.
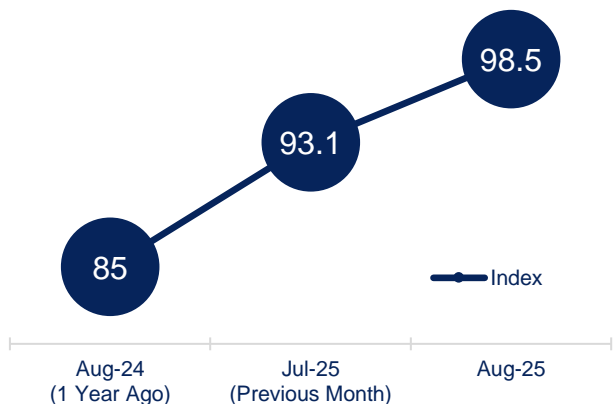
Source: Westpac Economics (website) – latest data as at 19/8/2025

Figure 4. Decomposition of annual productivity growth.
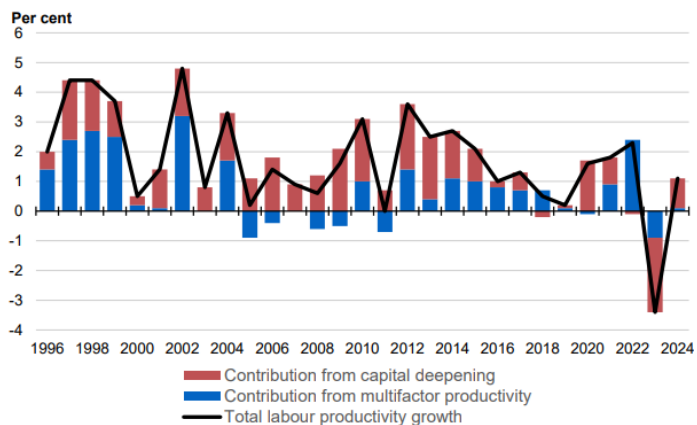
Source: Treasury (website) – latest as at August 2025

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

Source: Bloomberg – latest data as at 3/9/2025

Figure 6. Domestic airfares (real best discount).

Source: BITRE (website) – latest data as at 8/9/2025

Social factors

Aircraft noise complainants decreased 50% year-on-year in August, despite significant community engagement activity for flight path change proposals at Ballina, Brisbane, and Western Sydney. While some individuals remain highly engaged, overall trends affirm the value of a community-by-design approach to balance airport development with aircraft noise outcomes and public trust. In Brisbane, the increased use of Simultaneous Opposite Direction Parallel Runway Operations (SODPROPS) this year, when weather and operational conditions have allowed, has helped reduce flights over residential areas particularly during weekend daytime and weekday evening periods.

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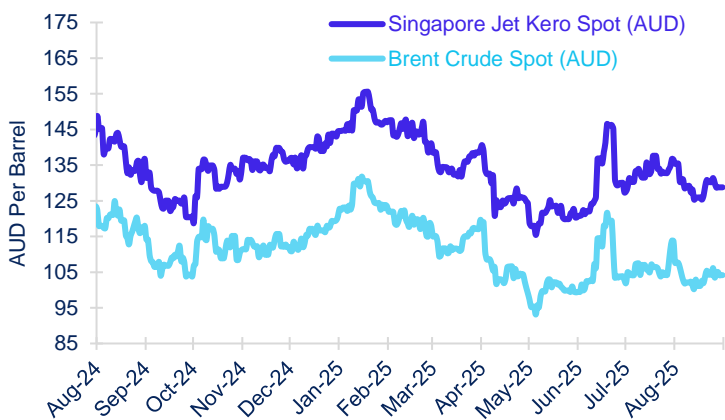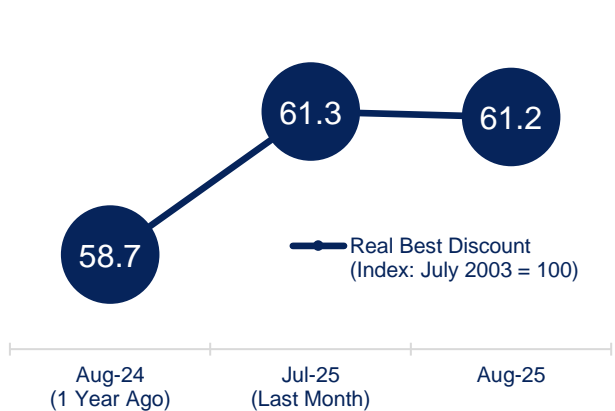

Noise Complaints

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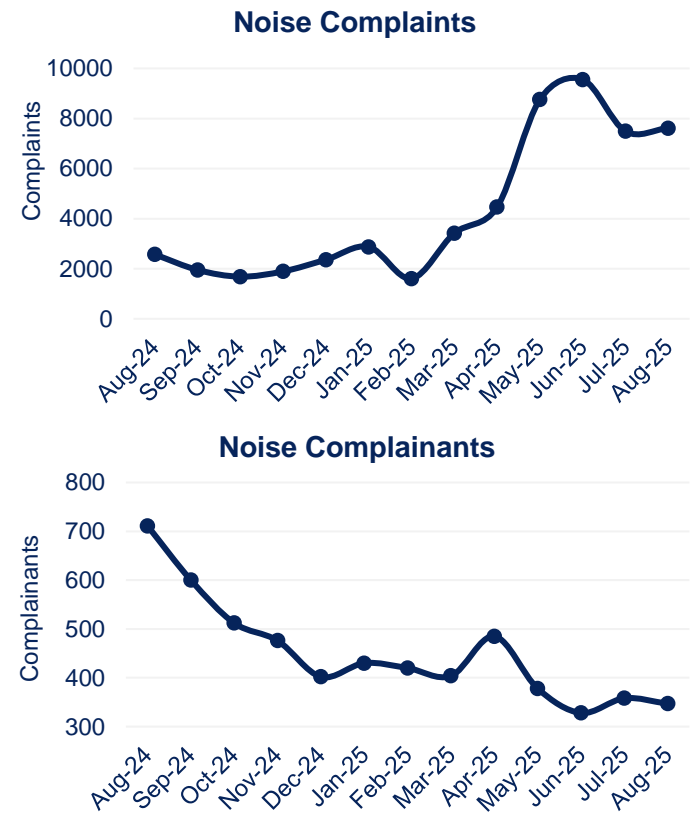
Figure 8. Aircraft noise complainants total and trend by location (August 2025 and August 2024, and change).

Noise Complainants by Airport

Noise Complainants Trend by Airport

Legend:
- All Other
- Brisbane
- Melbourne
- Perth
- Ballina
- Sydney
- Hobart
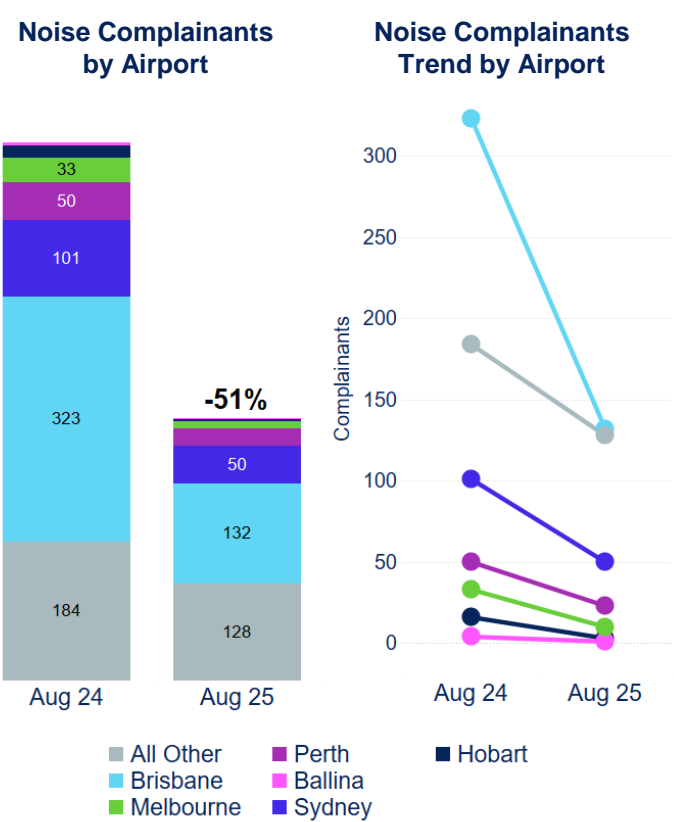
Figure 9. SODPROPs usage at Brisbane by monthly movements, and cumulative movements for year to date at Sydney.

Brisbane Airport

Sydney Airport
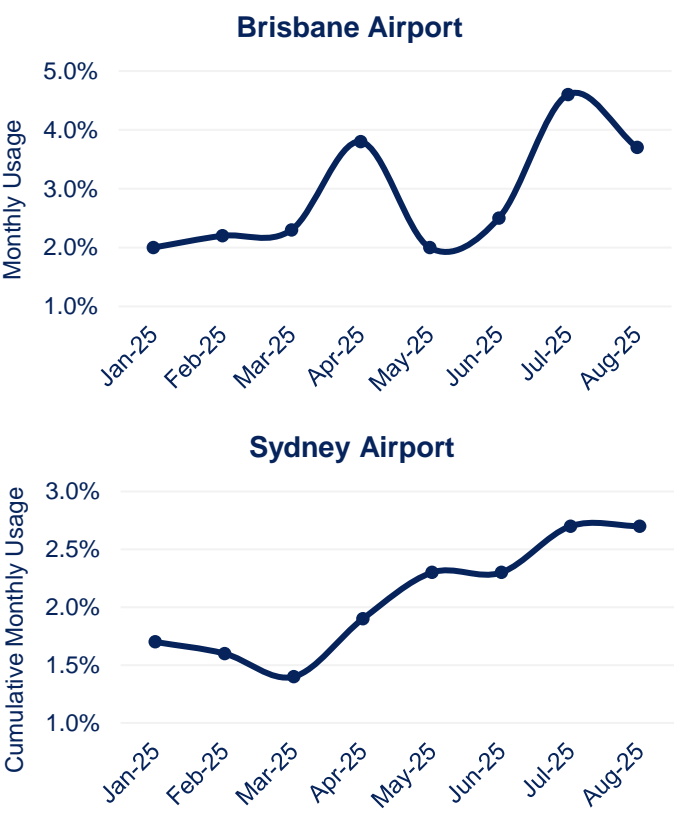
Source: Airservices' Noise Complaints and Information Service (NCIS) and Airservices' Aircraft in Your Neighbourhood tool (website).

Australian aviation and regional context

State of Australian aviation growth

In August 2025, the year-on-year growth from major domestic and international network carriers was offset by a marked decline in regional airline activity driven by fleet consolidation and indicative of structural changes within the domestic passenger transport sector. General aviation, including flight training, continued its steady growth demonstrating the sector's resilience and critical role in aviation workforce development, regional connectivity and providing essential services.

Figure 10. Year-on-year growth in average daily flights by for the passenger flight network in August 2025 (left) and monthly for all market segments (right).

Airline Passenger Flights

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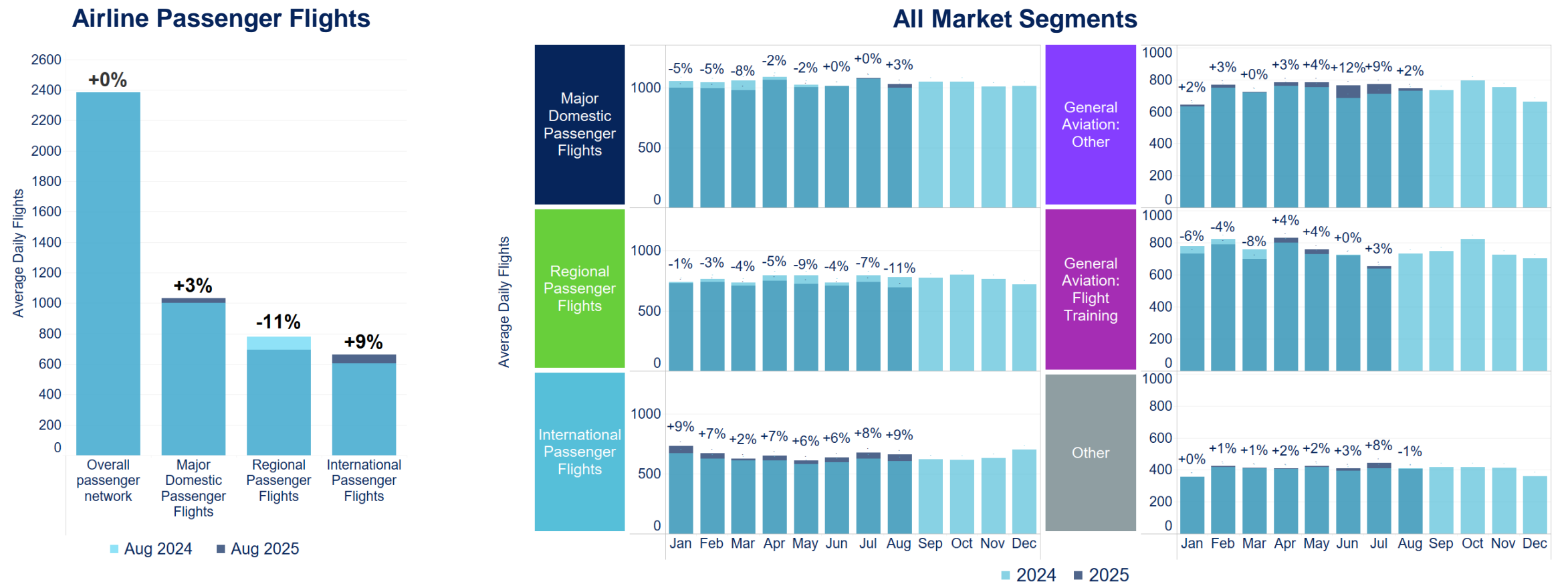
Source: Airservices ODAS (excludes helicopters). *General Aviation: Flight Training* is one month in arrears.

Top aircraft operators

After the July school holidays, most operators have returned to seasonal activity levels. Year-on-year growth is driven by major domestic and international network carriers, especially those operating across Southeast Asia and major hubs in the Asia-Pacific and Middle East. These carriers are leveraging geographical hub positioning, bilateral air service agreements, and fleet capacity advantages to capture demand across key growth corridors.

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

Aug 2025

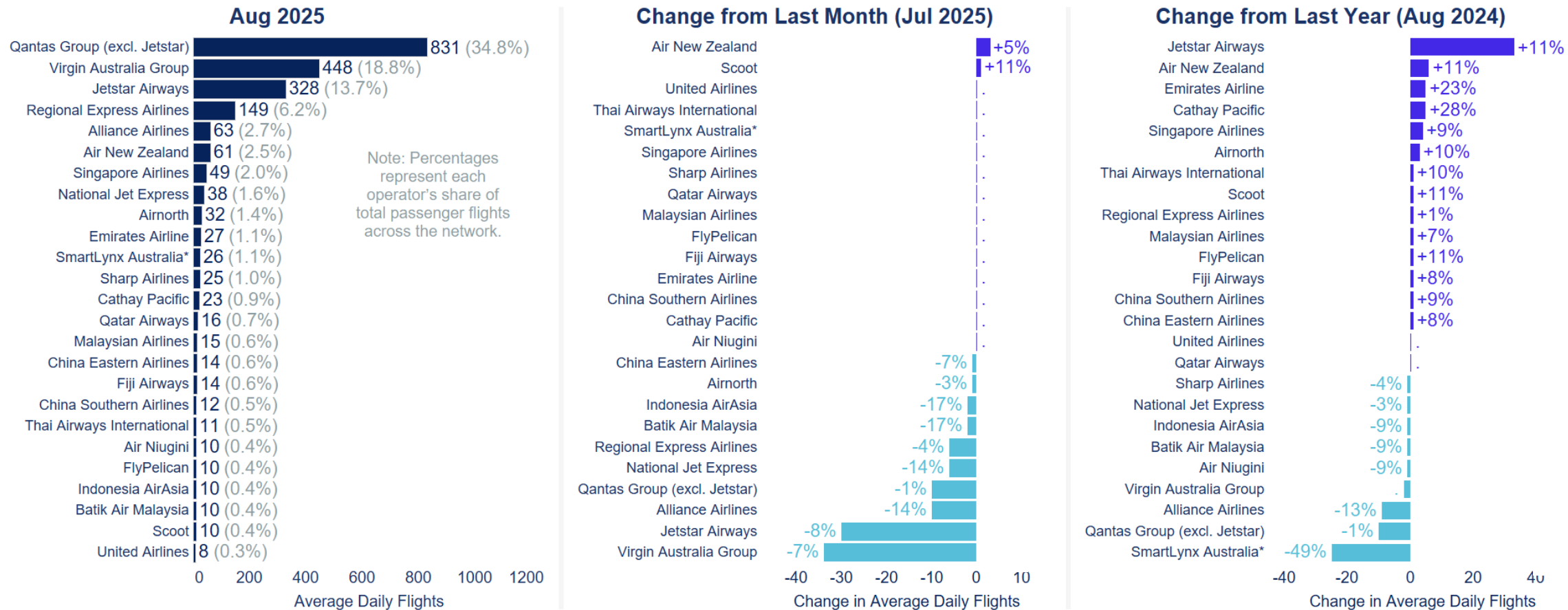| Operator	Average Daily Flights
Qantas Group (excl. Jetstar)	831 (34.8%)
Virgin Australia Group	448 (18.8%)
Jetstar Airways	328 (13.7%)
Regional Express Airlines	149 (6.2%)
Alliance Airlines	63 (2.7%)
Air New Zealand	61 (2.5%)
Singapore Airlines	49 (2.0%)
National Jet Express	38 (1.6%)
Airnorth	32 (1.4%)
Emirates Airline	27 (1.1%)
SmartLynx Australia*	26 (1.1%)
Sharp Airlines	25 (1.0%)
Cathay Pacific	23 (0.9%)
Qatar Airways	16 (0.7%)
Malaysian Airlines	15 (0.6%)
China Eastern Airlines	14 (0.6%)
Fiji Airways	14 (0.6%)
China Southern Airlines	12 (0.5%)
Thai Airways International	11 (0.5%)
Air Niugini	10 (0.4%)
FlyPelican	10 (0.4%)
Indonesia AirAsia	10 (0.4%)
Batik Air Malaysia	10 (0.4%)
Scoot	10 (0.4%)
United Airlines	8 (0.3%)

Note: Percentages represent each operator's share of total passenger flights across the network.

Change from Last Month (Jul 2025)

Operator	Change
Air New Zealand	+5%
Scoot	+11%
United Airlines	.
Thai Airways International	.
SmartLynx Australia*	.
Singapore Airlines	.
Sharp Airlines	.
Qatar Airways	.
Malaysian Airlines	.
FlyPelican	.
Fiji Airways	.
Emirates Airline	.
China Southern Airlines	.
Cathay Pacific	.
Air Niugini	.
China Eastern Airlines	-7%
Airnorth	-3%
Indonesia AirAsia	-17%
Batik Air Malaysia	-17%
Regional Express Airlines	-4%
National Jet Express	-14%
Qantas Group (excl. Jetstar)	-1%
Alliance Airlines	-14%
Jetstar Airways	-8%
Virgin Australia Group	-7%

Change from Last Year (Aug 2024)

| Operator	Change
Jetstar Airways	+11%
Air New Zealand	+11%
Emirates Airline	+23%
Cathay Pacific	+28%
Singapore Airlines	+9%
Airnorth	+10%
Thai Airways International	+10%
Scoot	+11%
Regional Express Airlines	+1%
Malaysian Airlines	+7%
FlyPelican	+11%
Fiji Airways	+8%
China Southern Airlines	+9%
China Eastern Airlines	+8%
United Airlines	.
Qatar Airways	.
Sharp Airlines	-4%
National Jet Express	-3%
Indonesia AirAsia	-9%
Batik Air Malaysia	-9%
Air Niugini	-9%
Virgin Australia Group	.
Alliance Airlines	-13%
Qantas Group (excl. Jetstar)	-1%
SmartLynx Australia*	-49%

Source: Airservices ODAS (includes airline flights only). Only top 25 airlines by flights are shown. *Formerly Skytrans.
Flights operated on wet-lease arrangements are counted towards the operators with the assigned callsigns.

Domestic network

In contrast to rising passenger demand, flight volume growth in 2025 has been constrained by persistent fleet supply challenges. Airlines are responding by optimising existing fleet capacity, extending aircraft lifespans, and deploying larger aircraft on high demand routes.

Figure 12. Comparison of passenger vs flight activity using 12 month rolling averages (left) and year-on-year growth (middle), and load factors (right).
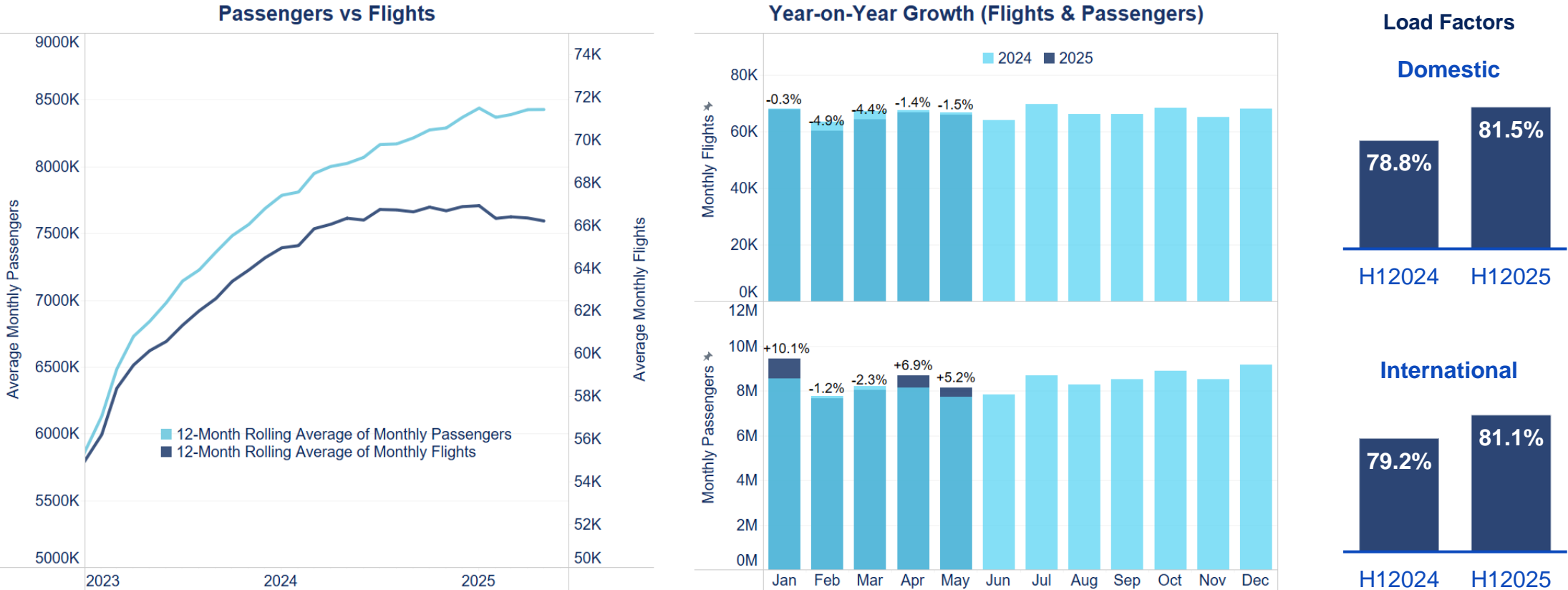

Source: BITRE data (latest up to May 2025) includes only airline flights and passengers at Australia's top 20 airports.
Domestic load factors includes only airline flights on Australia's top routes.

International markets

International traffic in August signals a change in Australian travel preferences shaped by cost-of-living pressures, exchange rates, global sentiment, and increasing sustainability awareness. As travel to the USA softens, rising demand for nearby destinations like Japan, China, and Vietnam shows a trend towards regional proximity and affordability. August also saw a strong recovery in trans-Tasman traffic following Air New Zealand's recent aircraft deliveries.

Figure 13. International market measures for August 2025 and comparison to August 2024, including international markets growth (left) and number of routes flown (right).
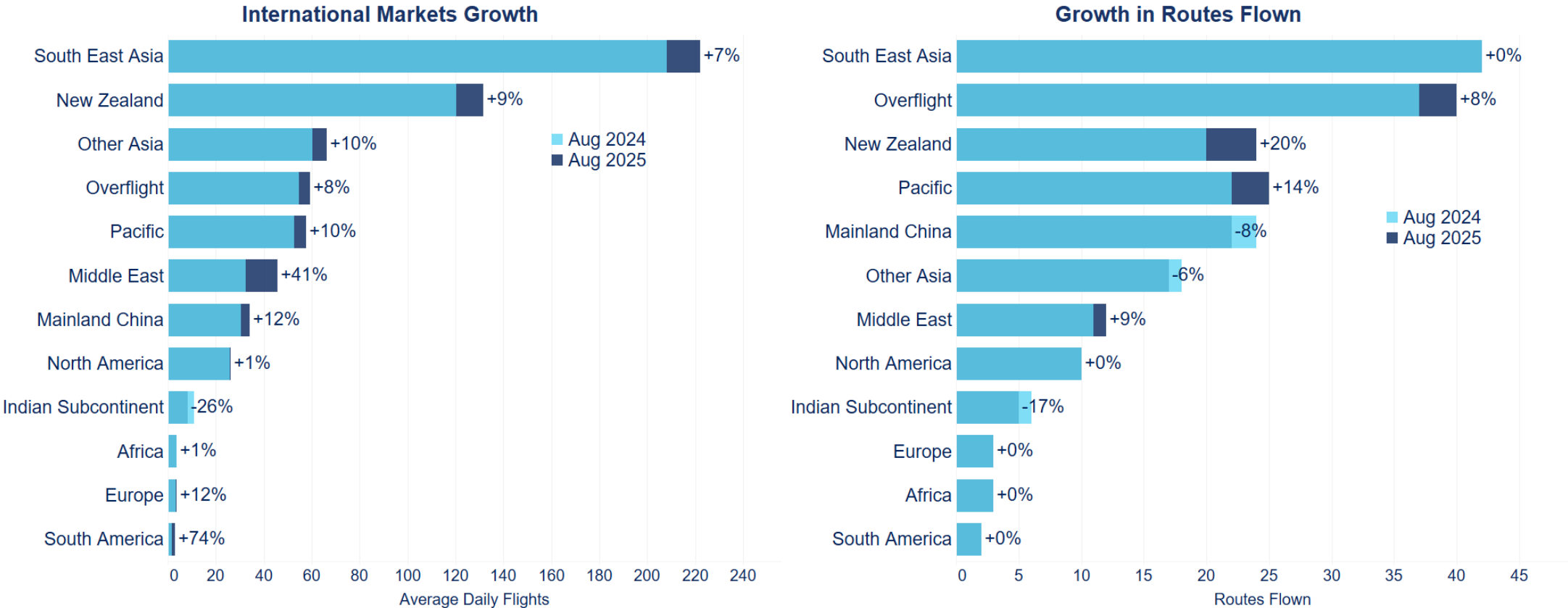

Source: Airservices ODAS (includes airline flights only). Overflights are those transiting the airspace without landing.
For multi-leg flights, legs that start and end outside Australian airspace are not included.

Domestic fleet

In August, Qantas Group took delivery of a second Airbus A321XLR and retired its last De Havilland Dash 8 (Q300), and Virgin Australia added its 12th Boeing 737-8 MAX. These new aircraft are enabling higher seat capacity, quieter and more fuel-efficient operations, and potential for new routes. While next-generation jets like the E190-E2 are expected to enter the Western Australia market, smaller regional airlines remain constrained by aging aircraft, highlighting the divergence in fleet capability across the domestic network.

Figure 14. Australian fleet for domestic airlines, including fleet in service and projected deliveries.
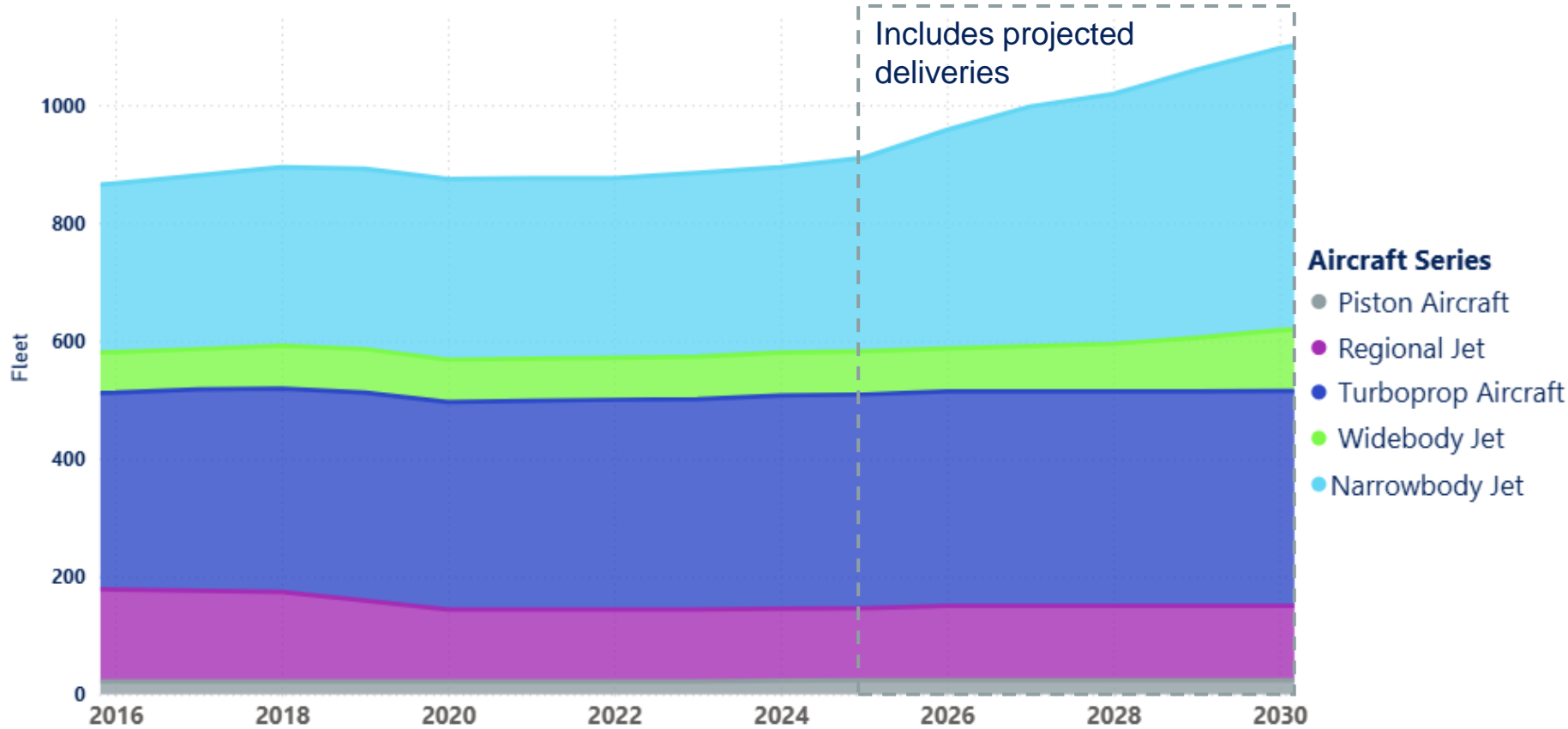
Source: Centre for Aviation Fleet (CAPA) data, as of 3 September 2025. Projected dates do not include aircraft retirements.
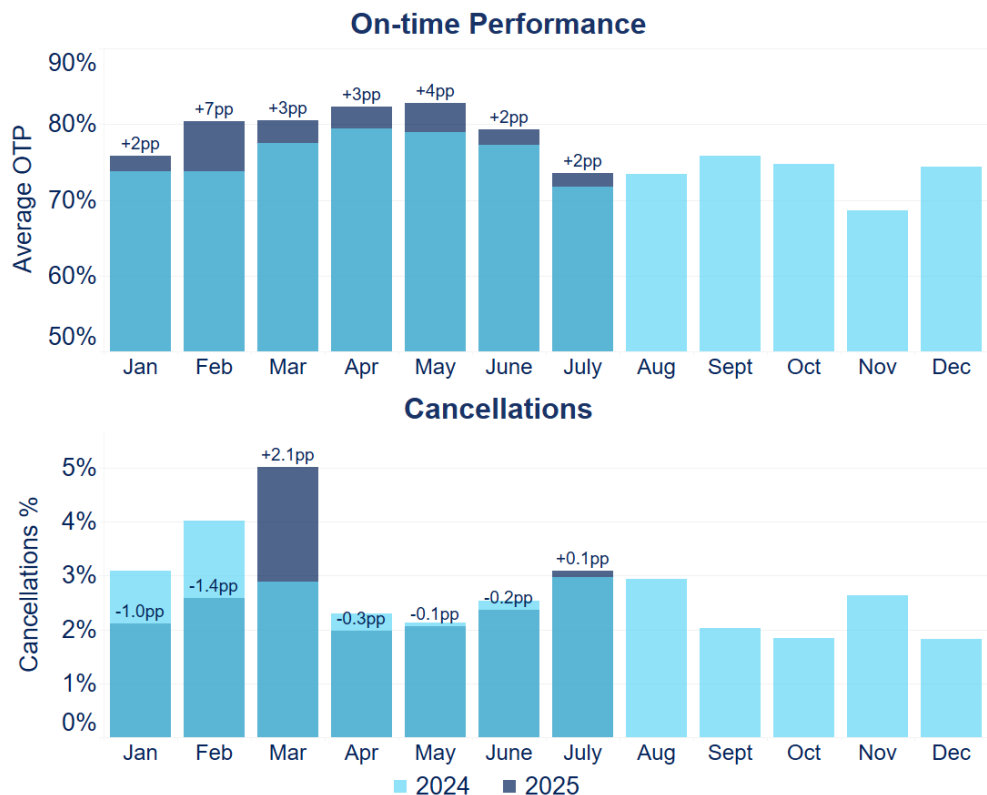
Australian aviation network performance

Industry performance

Industry on-time performance remains above last year's levels, though seasonal weather disruptions such as strong winds and low visibility affected recent performance. To collectively build network-wide resilience, industry workshops were progressed in August to refine scenario planning, disruption responses, collaborative pre-tactical and tactical decision-making and communication. These process improvements are being embedded into operational planning for the upcoming spring holiday and major events season.

Figure 15. Total industry OTP* and cancellations, up to July 2025.

On-time Performance

Cancellations

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

Departure Punctuality (First flight out)

Arrival Punctuality (First flight in)

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.
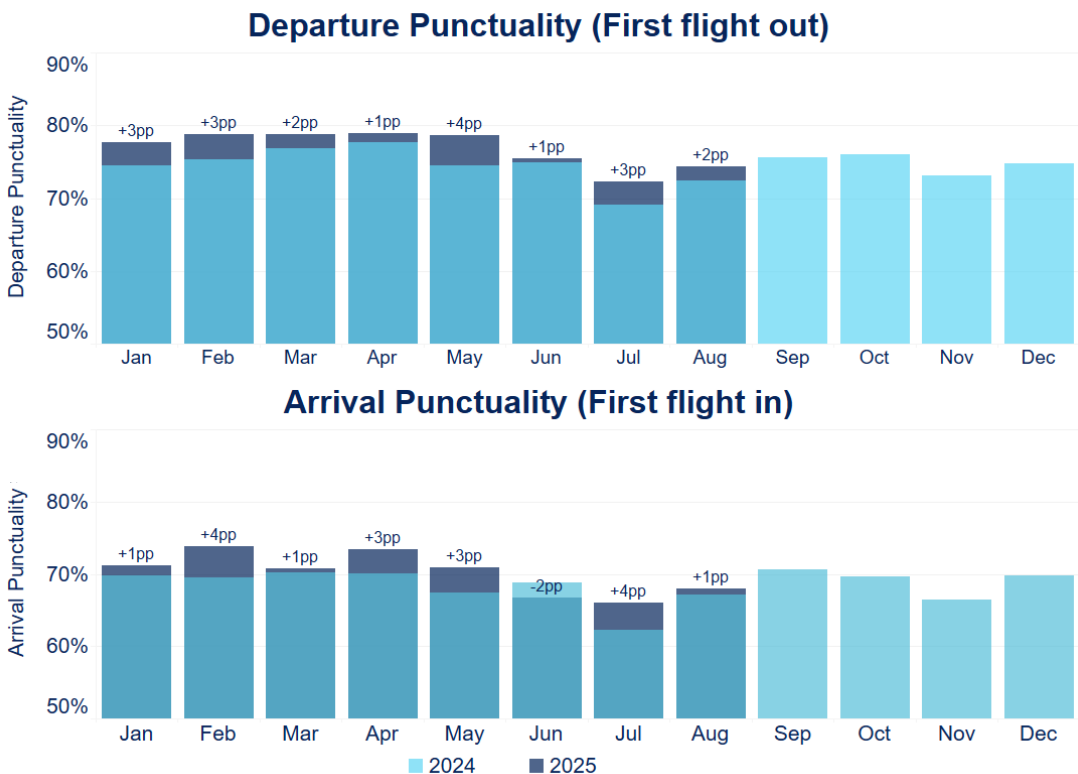
Source: Airservices ODAS. The data presented is an estimate based on domestic flight data available to Airservices, where departure and arrival punctuality and delays are based on take-off and landing times against initial times of the ATFM process. Note that arrival punctuality at Perth is determined on a small number of flights, as few flights have their first rotation inbound to Perth.

Network management process

Airservices collaborates 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. Airport Collaborative Decision Making (A-CDM) has been launched in Brisbane and Perth unlocking efficient departure operations enabled by real-time situation awareness.

Flight Schedules	Capacity	Balancing	Operations
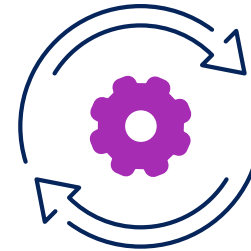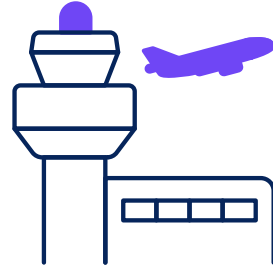
Flight Schedules

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. A-CDM is delivering on the ground efficiencies.

Air Traffic Flow Management (ATFM)

Ground delays in August remained below 2% of total delay and were 25% lower year-on-year, despite weather disruptions. GDP compliance stayed above 80%, with Perth showing steady improvement since March, demonstrating the value of close collaboration with local operators. Strong industry compliance to A-CDM procedures at Brisbane and Perth is unlocking early benefits. We are working with airports and airlines to harness data related to aircraft turnaround and gate processes to further quantify A-CDM operational benefits to compare against a pre-A-CDM baseline.

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

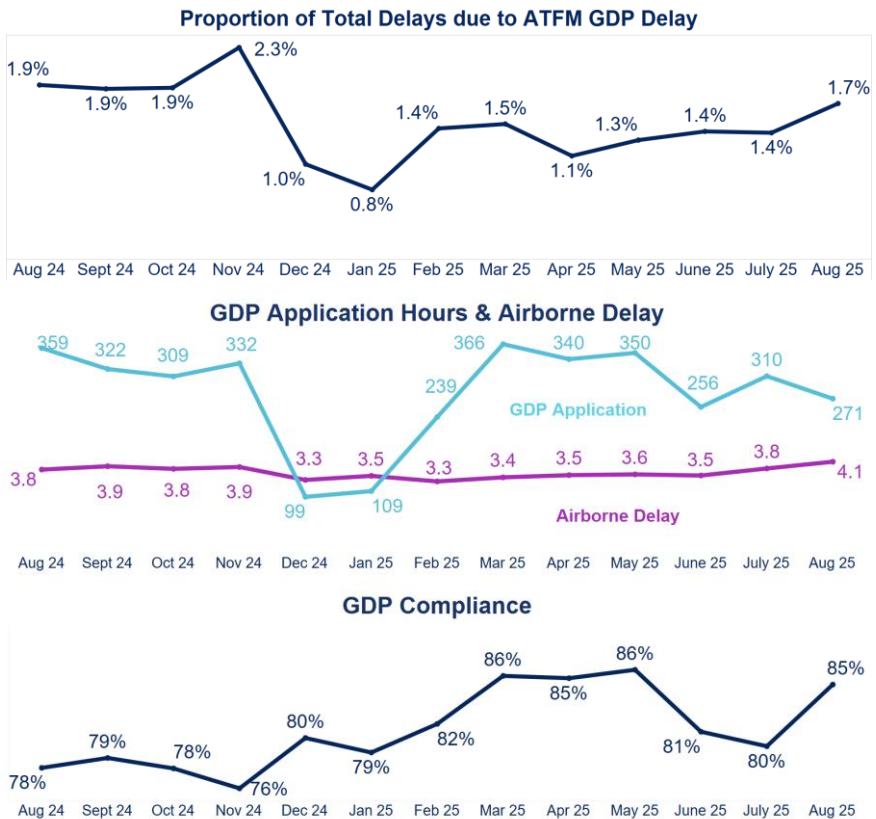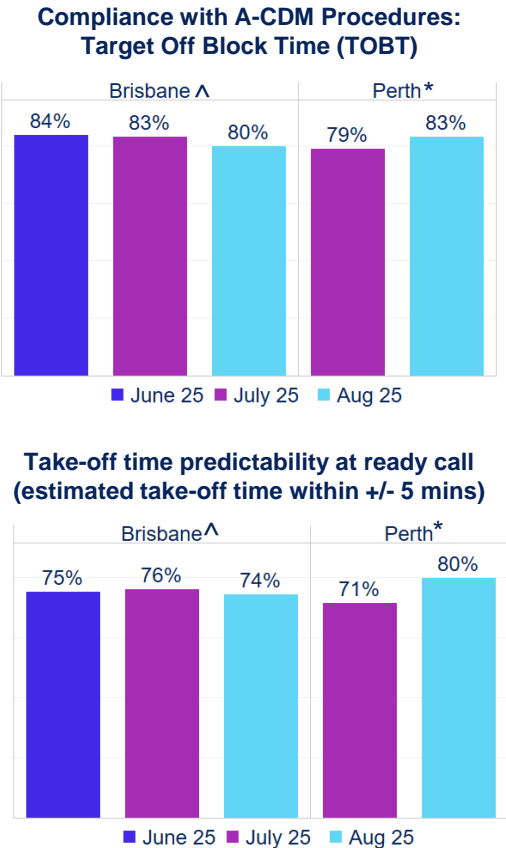Figure 18. ATFM (GDP) delay by attribution overall (top) and by airport (bottom). Note that categories were expanded in FY2025.


Figure 19. A-CDM metrics.

Source: Airservices ODAS and A-CDM. GDP compliance represents the proportion of flights into an airport that departed compliant with their assigned GDP slot.

^Brisbane A-CDM was implemented 10 May 2025. *Perth A-CDM was implemented 18 July 2025.

Air traffic service

Airspace service variations recorded their lowest level since January 2022. However, isolated impacts occurred at Sydney and metropolitan Class D aerodromes due to unplanned absences during the winter season. We are strengthening roster resilience to ensure service consistency. Apart from active recruitment and training, resilience measures such as staff standby arrangements are being progressed to mitigate seasonal resourcing pressures and support diverse operator needs across the network.

Figure 20. Airservices attributable hours of ATFM GDP delay (left) and variation from published levels across Airspace Groups (centre) and ATC Towers (right).
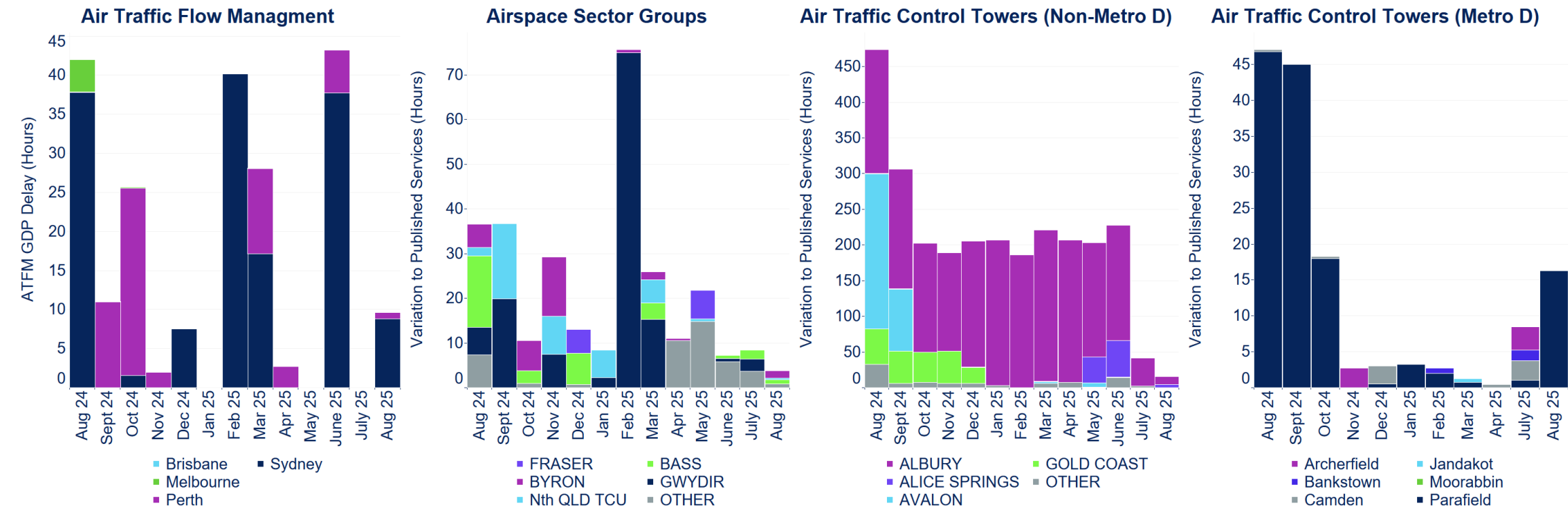
Variations to published services comprise of Temporary Restricted Areas and tower closure periods. During the periods of variations to published services at regional aerodromes, services in adjacent Class G airspace are generally unaffected (e.g. provision of flight, traffic information and safety alerting). 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)

ARFF service availability remains consistently high, with increased activity levels at major airports. This increased demand reflects ARFF's critical contribution to emergency preparedness, operational continuity, and the broader resilience of the airport ecosystem.

Figure 21. ARFFS service delivery metrics – monthly service availability (left) and number of emergency responses by type (right).

Monthly Service Availability (%)

Location	August 2024	July 2025	August 2025
Adelaide	99.79	100.00	99.99
Alice Springs	100.00	100.00	100.00
Avalon	100.00	100.00	100.00
Ayers Rock	100.00	100.00	100.00
Ballina	95.75	100.00	100.00
Brisbane	100.00	100.00	100.00
Broome	95.45	99.46	94.02
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	99.71	96.38	99.04
Gold Coast	99.97	100.00	100.00
Hamilton Island	93.38	99.40	98.71
Hobart	98.01	100.00	99.93
Karratha	92.93	98.25	100.00
Launceston	100.00	100.00	100.00
Mackay	100.00	99.77	100.00
Melbourne	100.00	100.00	100.00
Newman	96.94	100.00	100.00
Perth	100.00	100.00	100.00
Port Hedland	100.00	100.00	100.00
Proserpine	97.32	96.01	100.00
Rockhampton	100.00	100.00	100.00
Sunshine Coast	100.00	100.00	100.00
Sydney	100.00	100.00	100.00
Townsville	100.00	100.00	99.69
All Airports	99.84	99.96	99.96

Emergency Responses

Source: Airservices ODAS and ARFFS TRAX. Service availability is based on aircraft movements that received applicable category of ARFFS coverage. Major capital city airports include Sydney, Melbourne, Brisbane, and Perth. In addition to aircraft-related incidents, fire alarms, and first aid, ARFF units also respond to a wide range of events - including hazardous materials, medical emergencies, security threats, non-aircraft fires, and mutual aid requests.

For more information
stakeholder@airservicesaustralia.com