Australian Aviation Network Overview

September 2025

airservices australia

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

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Executive Summary

The Australian aviation network achieved major milestones this month. The 18th of September (Thursday) marked the busiest day for airline passenger transport since 2019 with 2799 flights. Brisbane Airport set an all-time record on 26th of September (Friday) with 617 movements. This highlights the ongoing leisure-led nature of demand driven by holiday travel and major events like the Australian Football League (AFL) Grand Final.

Airlines added capacity and deployed larger aircraft to meet peak demand. International traffic was buoyed by outbound tourism to nearby destinations such as Bali and Kuala Lumpur, codeshare agreements connecting to global hubs, and inbound demand reflecting Australia's position in high-value, long-haul travel segments.

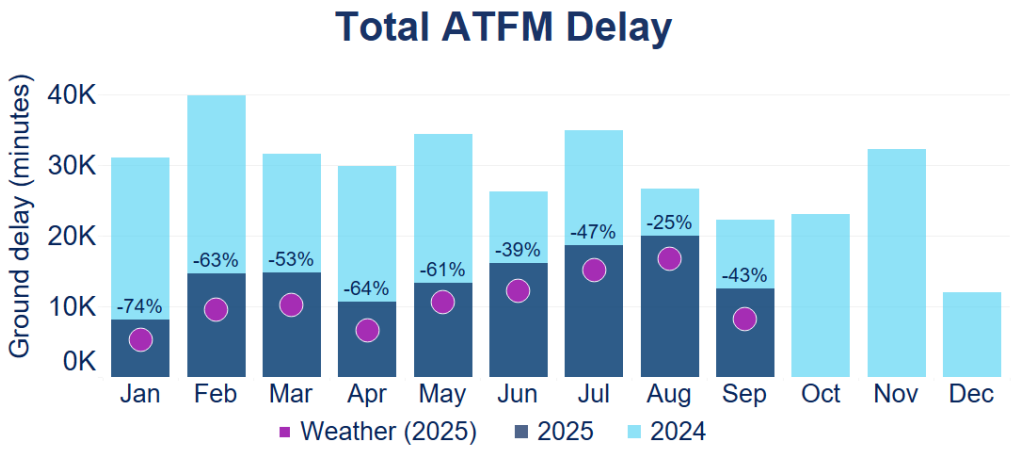
Airports are responding to this growth with multi-billion-dollar investments in terminal expansions, technology and sustainability, as seen in Sydney and Perth's preliminary master plans. Fleet renewal, such as the entry of the Airbus A320XLR into commercial service, is enabling more direct, point-to-point leisure routes within Australia and internationally.

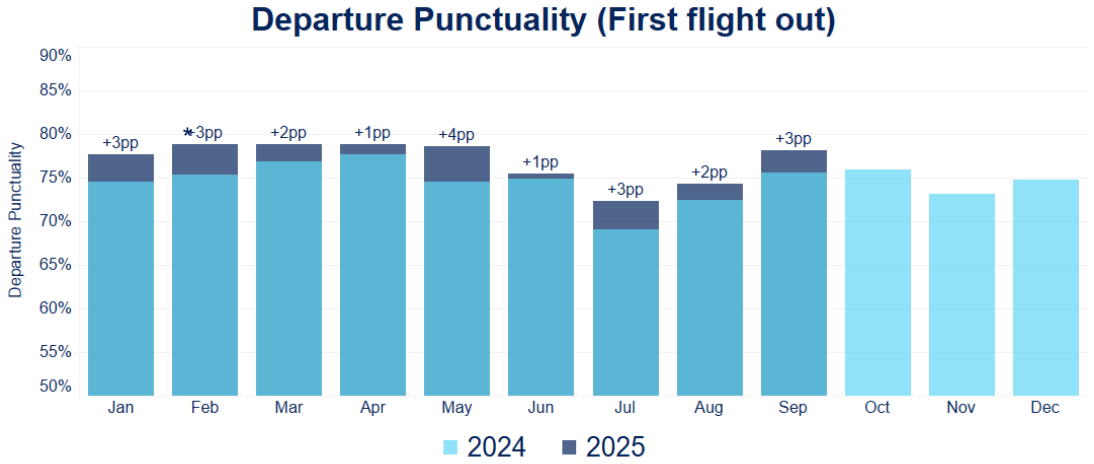
Despite challenging winter conditions, industry performance remained resilient. The Senior Industry Roundtable Forum, which is held during heightened travel periods, played a key role in aligning network planning and performance while collectively focusing on minimising passenger disruptions. Ground Delay Program (GDP) application dropped by 50 hours this September compared to last year, even with over 100 additional daily aircraft movements at the four busiest airports.

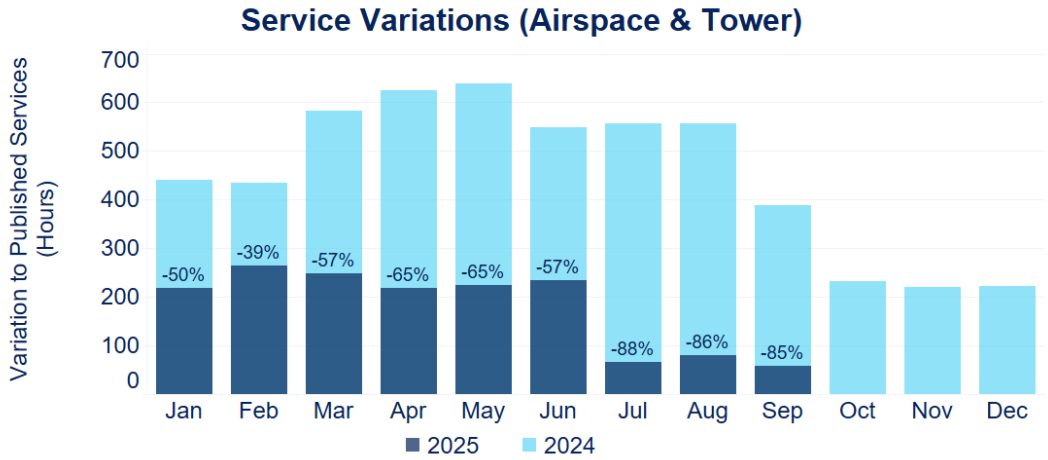
Strong adoption of Airport Collaborative Decision Making (A-CDM) at Brisbane and Perth continue to deliver benefits through optimised departure sequencing and the dynamic, real-time distribution of delays more equitably. Since its implementation, daily total air traffic flow management departure delays at Perth Airport have decreased substantially from around 390 minutes (~4minutes per flight) to just 50 minutes (less than a minute per flight).

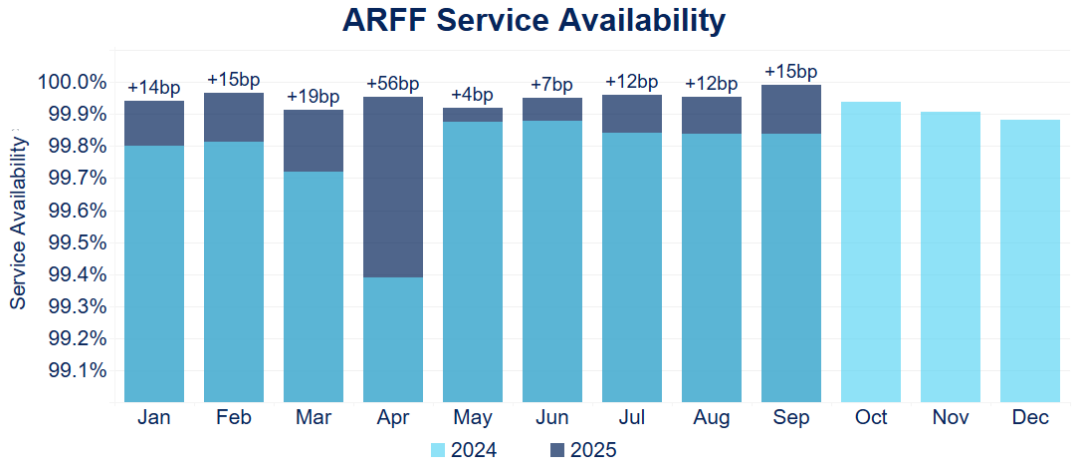
In September 2025, service variations at air traffic control towers fell to their lowest levels since July 2022, with over 90% reduction from the monthly average. Airspace service variation was limited to one area only. However, unplanned staffing unavailability in Sydney Terminal Airspace on 12 and 19 September highlighted that resilience gaps remain. We continue to focus on active recruitment, training and building standby capacity, while improving end-to-end workforce planning processes to prevent and mitigate the impact of such events. ARFF service availability recorded its highest level in two years, reaffirming our commitment to world-class emergency response, critical for aviation safety and growth.

Network performance snapshot (year-on-year comparisons)









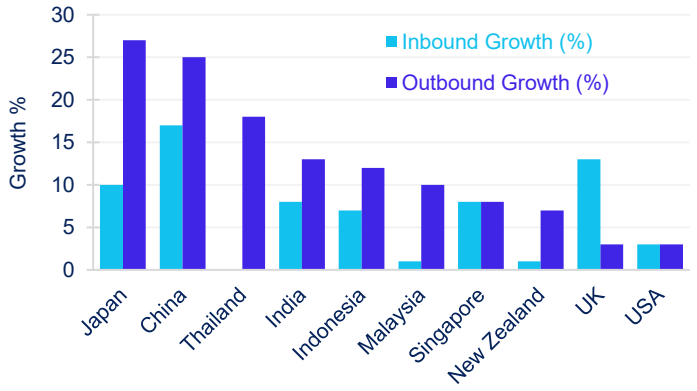
*PP refers to a percentage point change, whereas BP refers to a basis point change – the latter is used to measure smaller percentage changes. For example, a change from 99.82% to 99.94% = 0.12 PP = 12 BP.
ARFF service availability is based on aircraft movements that received applicable category of ARFFS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

Economic and social trends

Economic factors

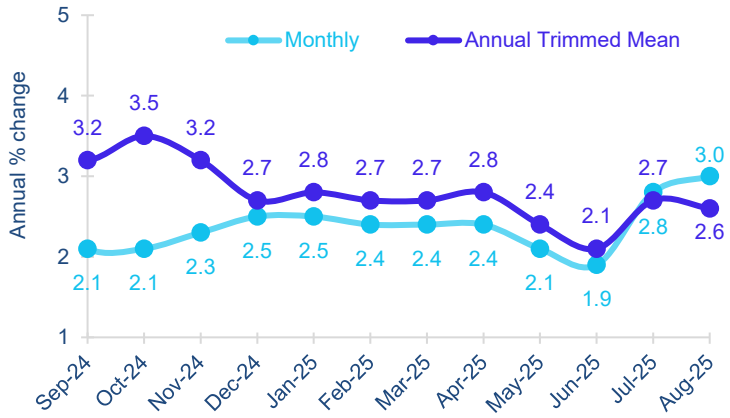
Steady inflation, resilient domestic economic activity and stable fuel prices support a cautiously positive outlook for the Australian aviation sector. Exchange rate movements and global geopolitical sentiment are influencing inbound and outbound travel patterns. Meanwhile, robust passenger demand outpacing capacity is placing upward pressure on airfares.

Figure 1. Outbound resident and inbound visitor year-on-year growth for key markets.



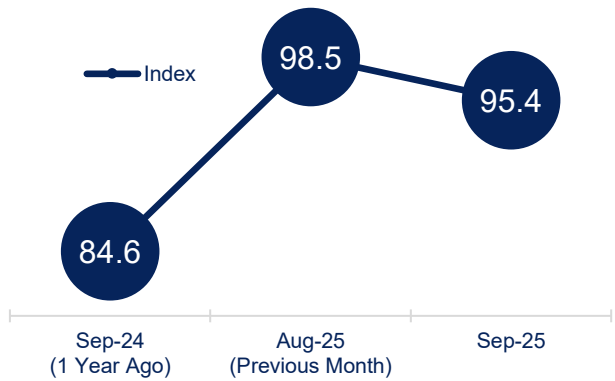
Source: ABS (website) – latest data to July 2025 as at 7/10/2025

Figure 2. Consumer Price Index (CPI) Indicator.



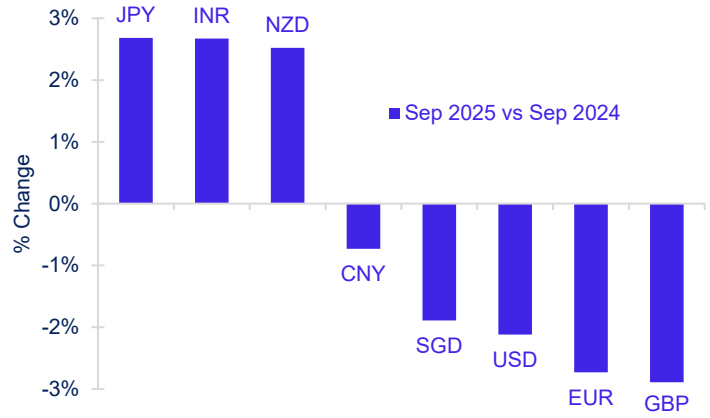
Source: ABS (website) – latest data to August 2025 as at 24/9/2025

Figure 3. Westpac Melbourne Institute Consumer Confidence.



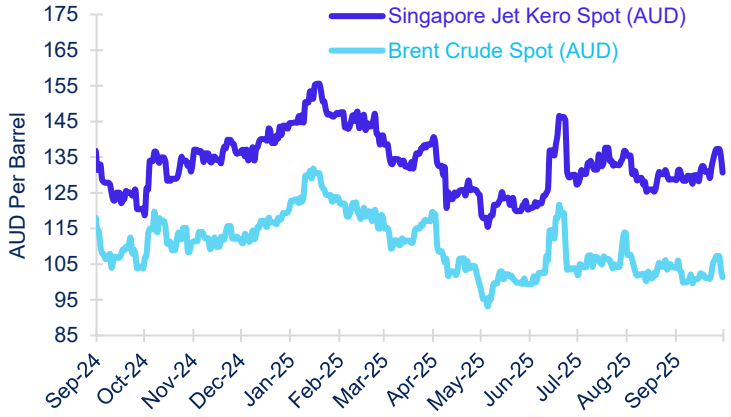
Source: Westpac Economics (website) – latest data as at 19/8/2025

Figure 4. AUD exchange rates.



Source: Exchange Rates (website) – latest as at 25/9/2025

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

The increasing trend in the monthly use of Simultaneous Opposite Direction Parallel Runway Operations (SODPROPS) at Brisbane Airport, when weather and operational conditions permit, reflects our ongoing commitment to minimising the impact of aircraft operations on local communities. Nationally, we continue to work closely with airlines and airport partners to proactively engage with communities, balancing aircraft noise outcomes with the industry's need for sustainable growth.

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

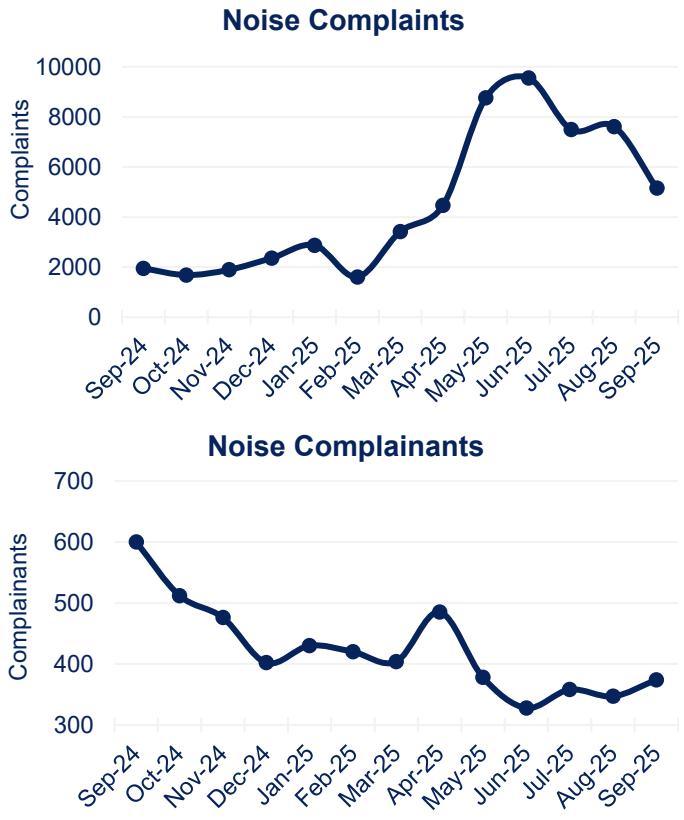


Figure 8. Aircraft noise complainants total and trend by location (September 2025 and September 2024, and change).

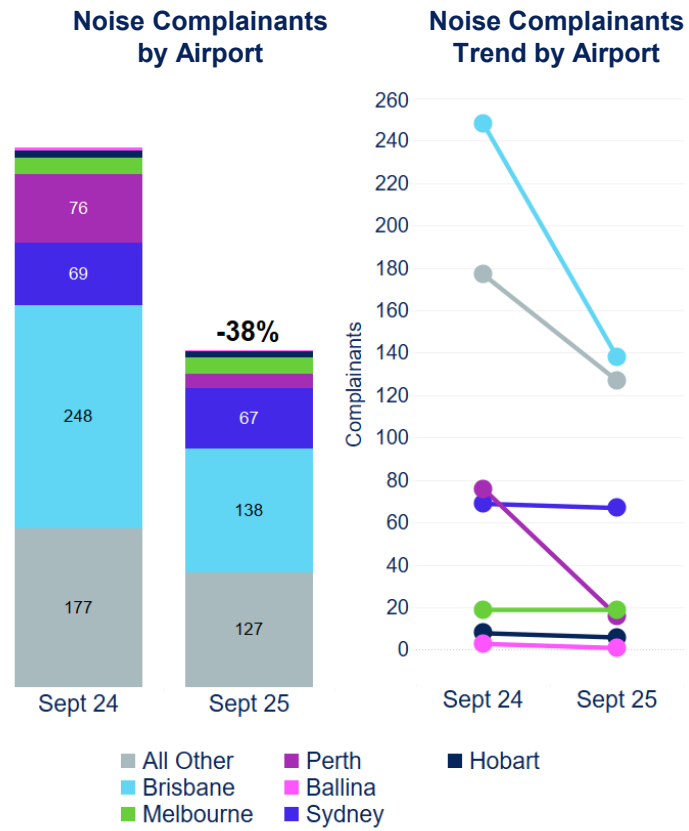
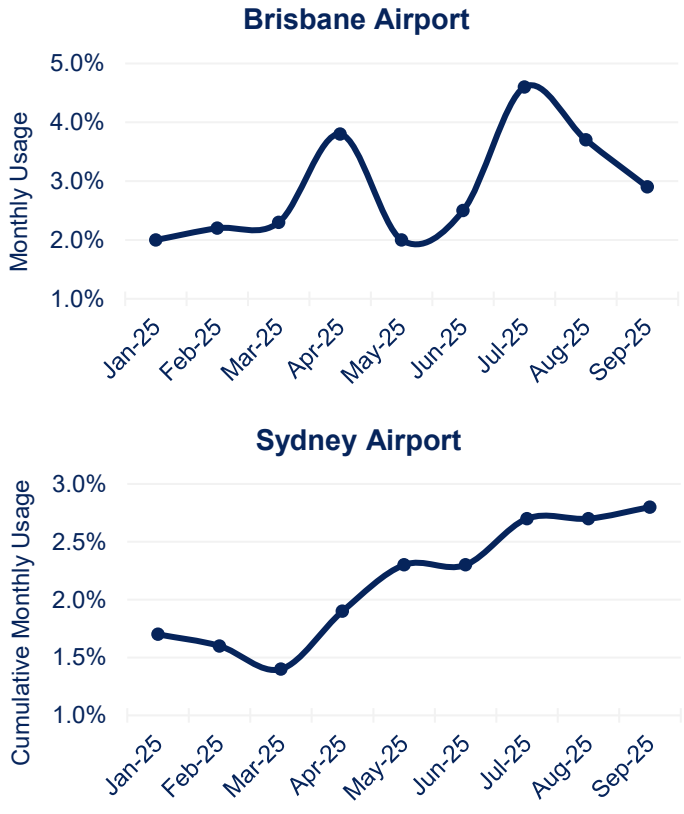


Figure 9. SODPROPs usage at Brisbane by monthly movements, and cumulative movements for year to date at Sydney.

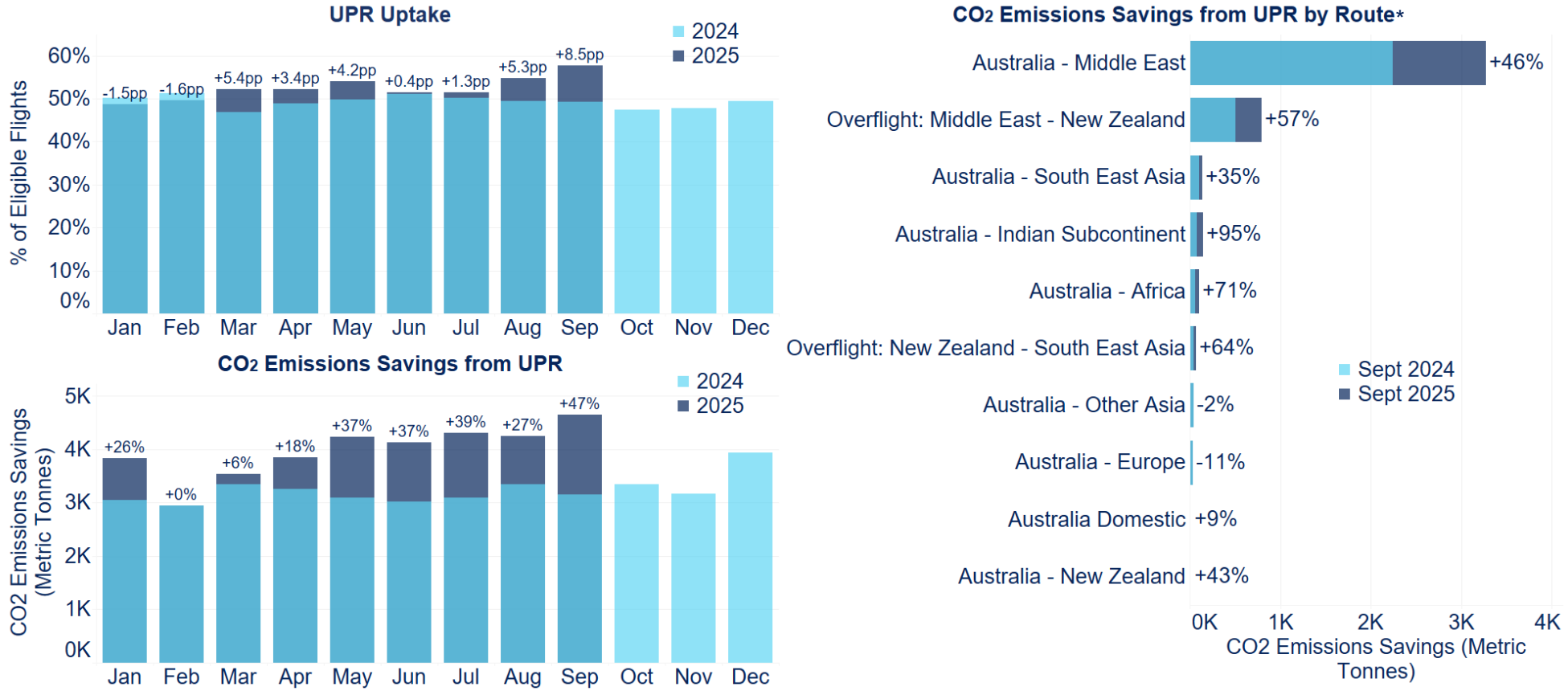


Source: Airservices' Noise Complaints and Information Service (NCIS) and Airservices' Aircraft in Your Neighbourhood tool (website).

Social factors: aircraft emissions

Since the expansion of the User Preferred Routes (UPR) trial in July 2025, several long-haul and transcontinental flights have achieved more than a 50% year-on-year reduction in CO_2 emissions across their entire flight segment within Australian airspace. These results demonstrate how flexible routing, enabled through cross-border collaboration, is delivering tangible progress toward aviation's 2050 net-zero target.

Figure 10. User Preferred Routes (UPR) measures: total percentage of eligible flights using UPRs (top left), total CO_2 emissions savings (bottom left), and route-level CO_2 savings comparing September 2025 to September 2024 (right).



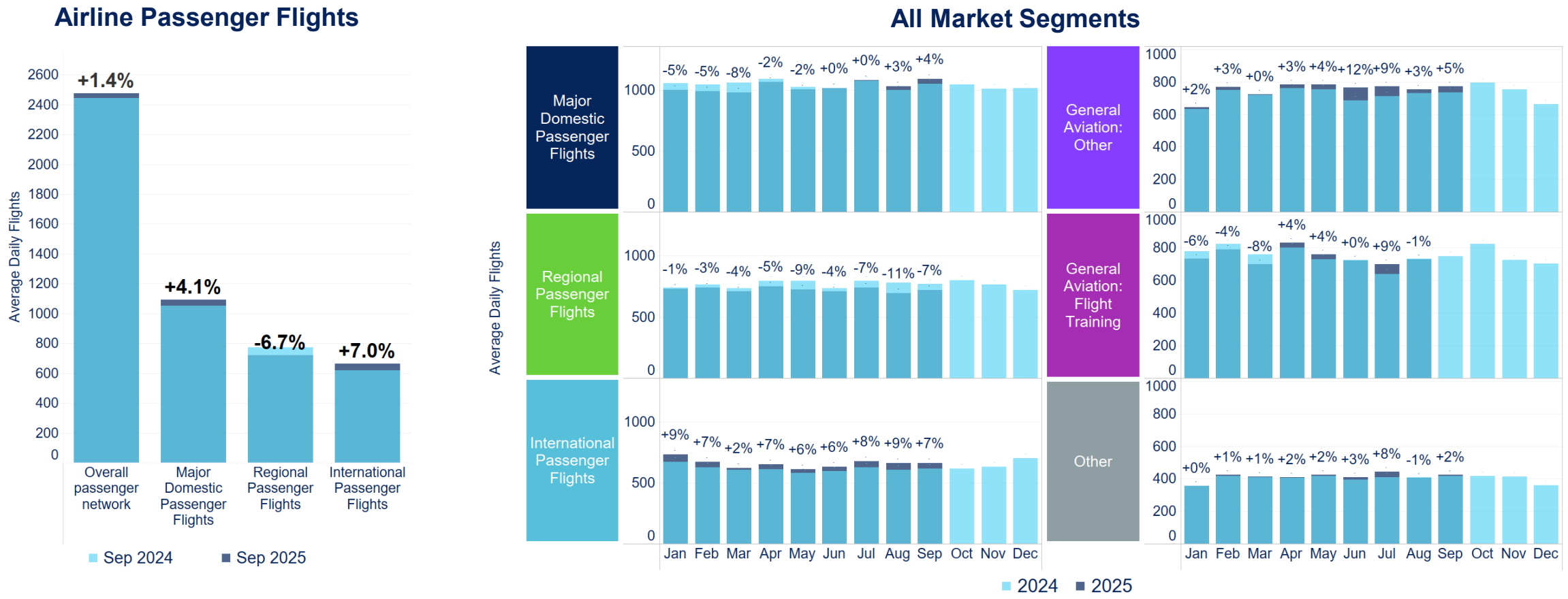
Source: Eligible flights include all jet operations over oceanic and cross-continental airspace. Eligibility is independent of technology, training, or other operational constraints.
* Only top 10 routes by total CO_2 emissions savings are shown.

Australian aviation and regional context

State of Australian aviation growth

Thursday 18 September 2025 marked the busiest day for Australia's airline passenger transport since 2019 with 2799 flights. Brisbane Airport set an all-time record on Friday 26 September with 617 movements. These milestones reinforce the leisure-led nature of post-pandemic demand, highlighting how holiday travel and events continue to shape aviation growth.

Figure 11. Year-on-year growth in average daily flights by for the passenger flight network in September 2025 (left) and monthly for all market segments (right).

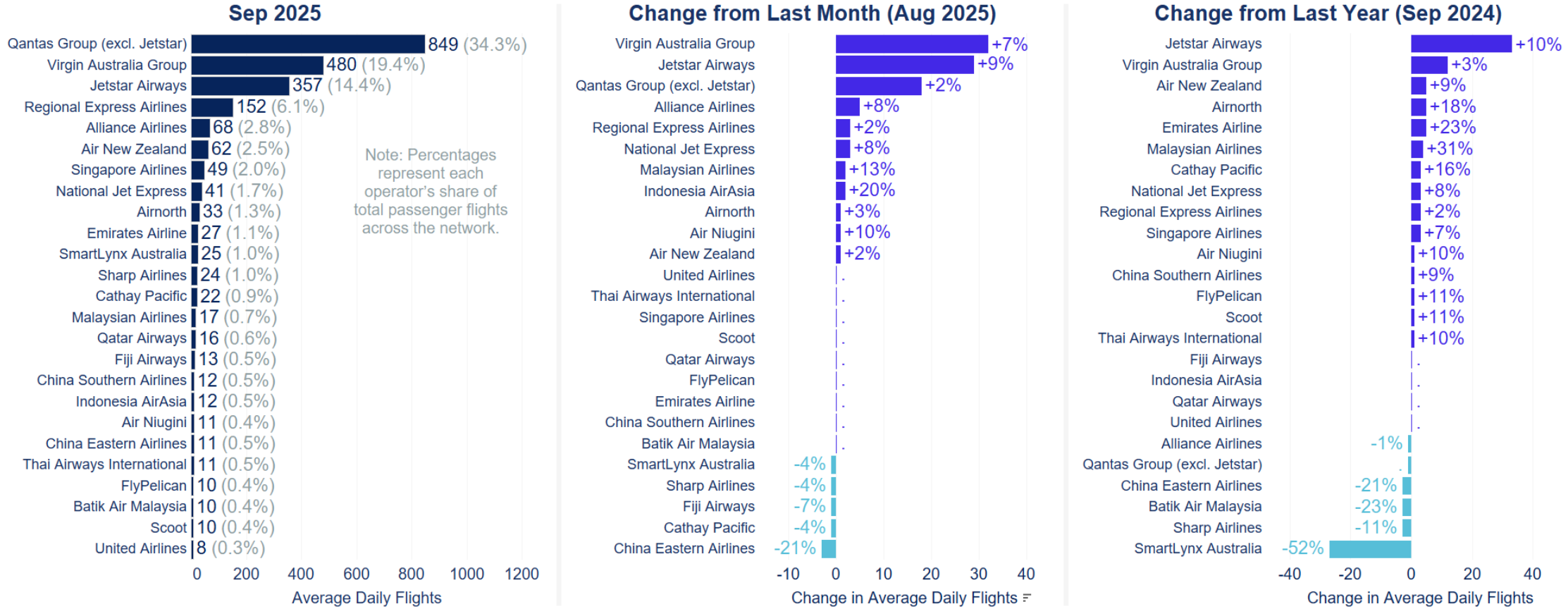


Source: Airservices ODAS (excludes helicopters).*General Aviation: Flight Training* is one month in arrears.

Top aircraft operators

This month's activity growth was led by major domestic airlines which increased services and deployed larger aircraft to meet surging demand. Southeast Asian carriers also showed strong gains, reflecting outbound travel to popular regional destinations during school holidays. In contrast, Chinese airlines are consolidating frequencies, focusing on fleet and route optimisation, and shifting toward niche city pairs with strong trade and tourism links.

Figure 12. Average daily flights by top operators (September 2025) and comparisons across two reference periods.

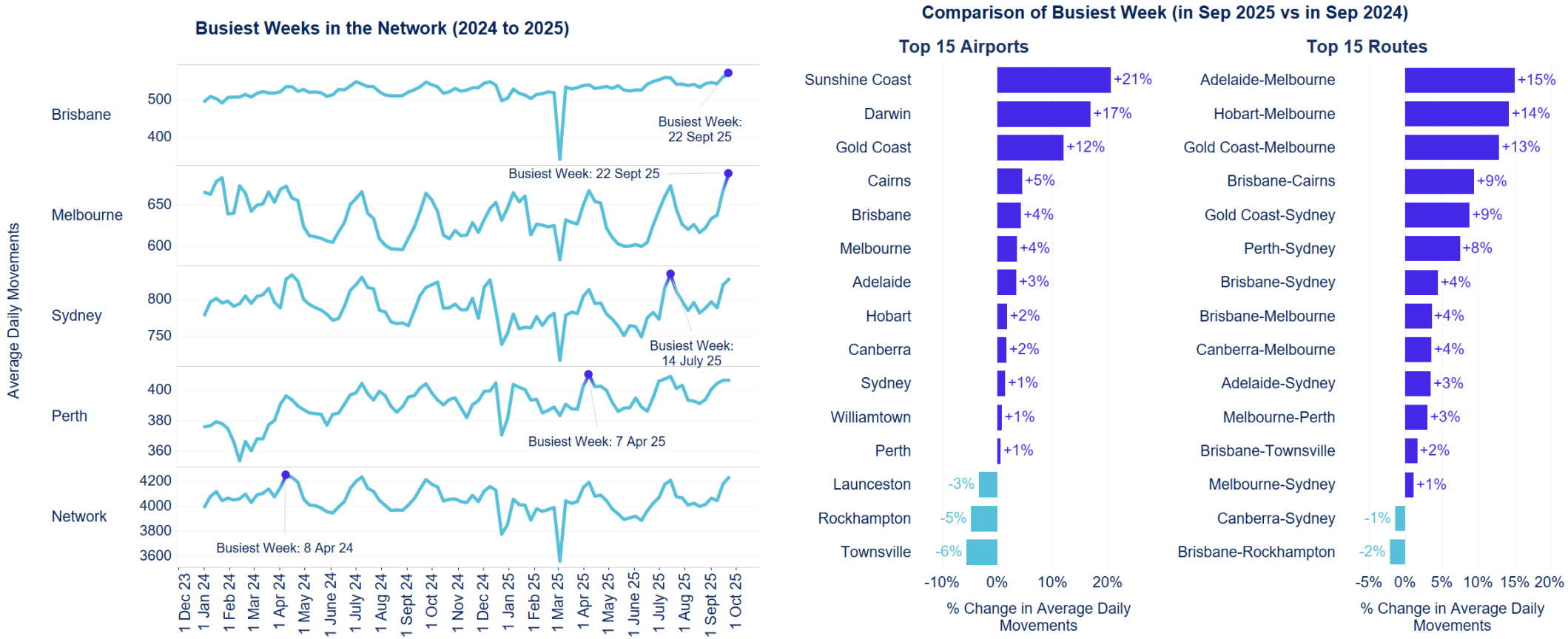


Source: Airservices ODAS (includes airline flights only). Only top 25 airlines by flights are shown.
Flights operated on wet-lease arrangements are counted towards the operators with the assigned callsigns.

Domestic network

Domestic network growth continues to be driven by strong leisure demand to coastal holiday destinations, alongside major events such as the AFL Grand Final which create concentrated travel peaks. Airports are responding to seasonal peaks and investing heavily in capacity, resilience and passenger experience. Sydney and Perth Airports' preliminary master plans underscore a multi-billion-dollar investment across the airport sector, focused on terminal expansions, technology, operational efficiency and sustainability.

Figure 13. Busiest weeks in the network based on average daily movements since 2024 (left) and comparison of busiest weeks by average daily movements in September 2025 vs September 2024, across the top 15 airports and top 15 routes (right).

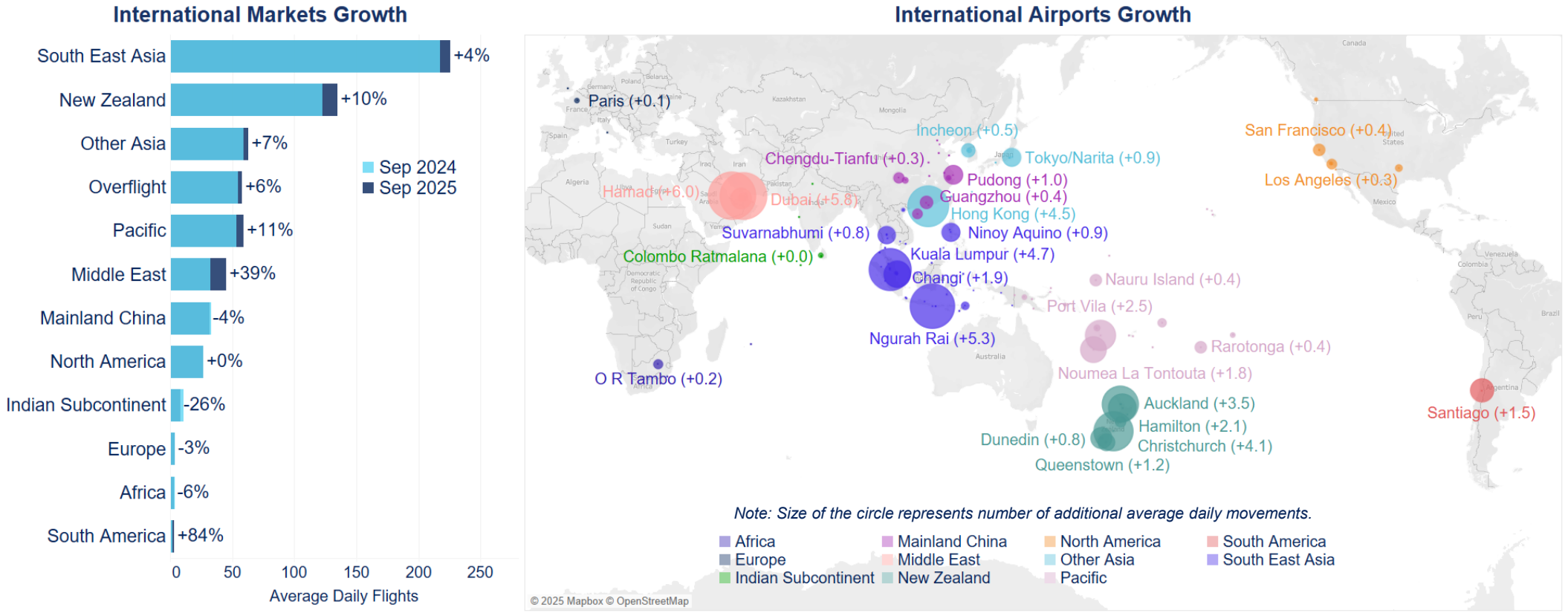


Source: Airservices ODAS (includes airline movements only). Each movement is counted as one departure or one arrival at a domestic airport - for example, a Sydney to Melbourne flight counts as one movement at Sydney and one at Melbourne.

International markets

International traffic growth is driven by strong outbound tourism to nearby affordable destinations like Bali and Kuala Lumpur, while codeshare agreements are expanding long-haul connectivity through global transfer hubs like Doha. Inbound demand from long-haul markets seeking premium experiences reinforces Australia's attractive position in both leisure and high-value travel segments.

Figure 14. Comparison of international markets growth (left) and international airport growth (right) for September 2025 vs September 2024.

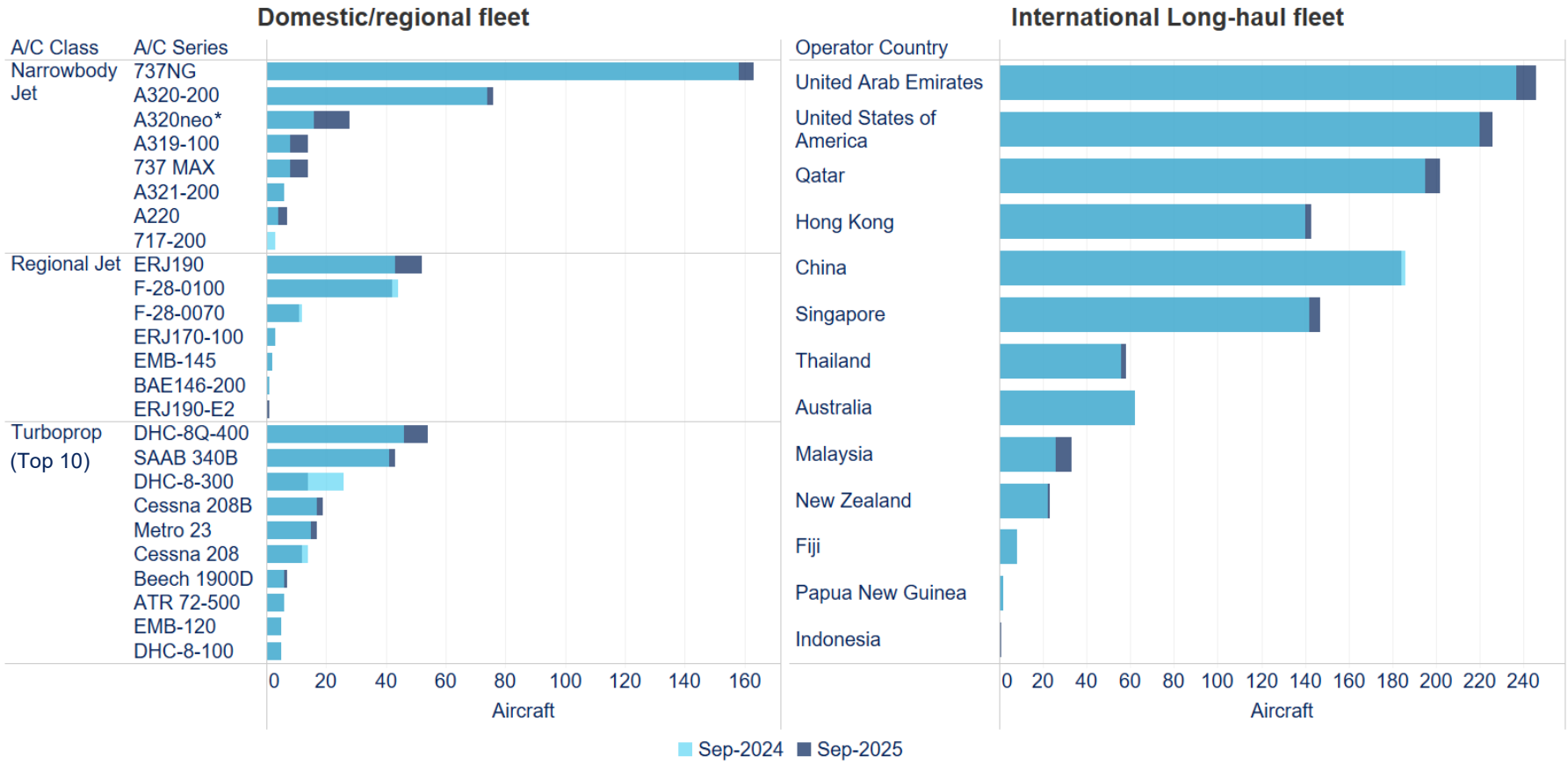


Source: Airservices ODAS (includes airline flights only). Overflights are those transiting the airspace without landing (these are not included in the map).
For multi-leg flights, legs that start and end outside Australian airspace are not included.

Network fleet

September marked another milestone with the new Airbus A320XLR entering into commercial service. As domestic airlines continue fleet renewal and international carriers expand capacity, we are seeing more direct, point-to-point leisure travel. Australia is also becoming increasingly integrated into the global aviation network, including stronger connectivity to major international transfer hubs especially in the Middle East.

Figure 15. Aircraft in service across Australia's domestic/regional fleet (left) and the international long-haul/widebody fleet of the Top 25 airlines (right), comparing September 2025 and September 2024.



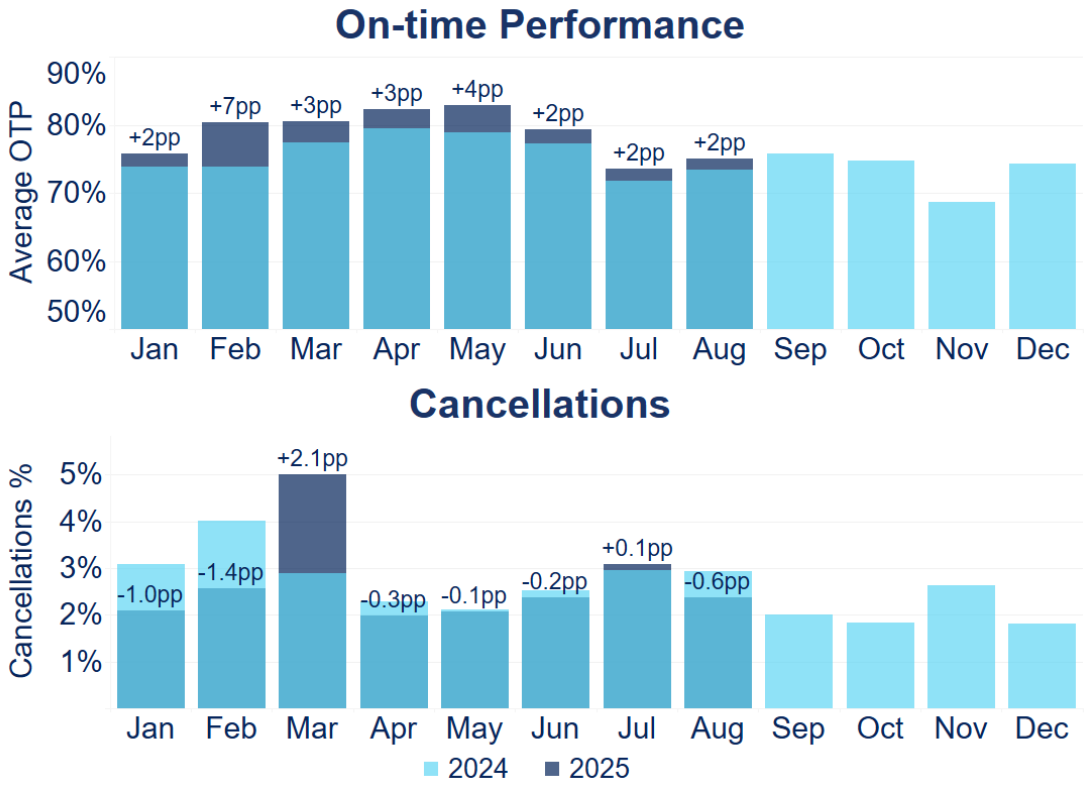
Source: Centre for Aviation Fleet (CAPA) data, as of 7 October 2025. International long-haul fleet includes top 25 airlines (by flights) as shown on page 12.
* Includes the A321XLR.

Australian aviation network performance

Industry performance

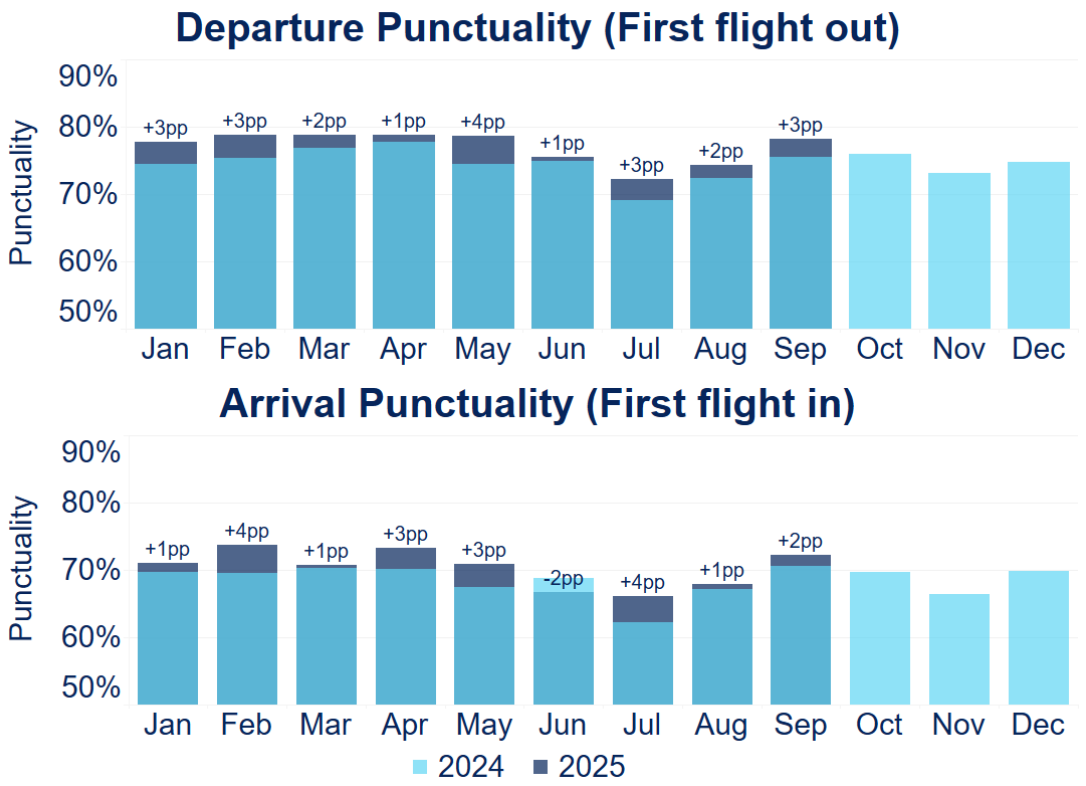
Despite challenging winter conditions, the industry maintained a collective focus on operational performance. This was demonstrated through proactive sharing of demand outlook, joint scenario analysis and a unified approach to optimising network decisions focusing on minimising passenger disruptions.

Figure 16. Total industry OTP* and cancellations, up to August 2025.



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

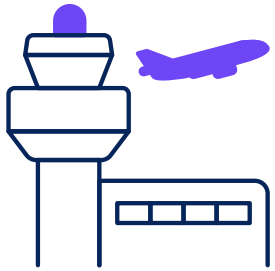
Figure 17. First wave punctuality to September 2025 as a lead indicator for OTP.

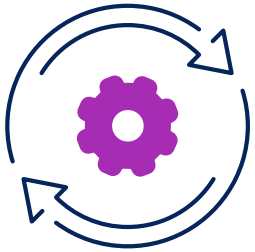


Source: Airservices ODAS. The data presented is an estimate based on domestic flight data available to Airservices, where departure and arrival punctuality and delays are based on take-off and landing times against initial times of the ATFM process.

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

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)

ATFM delays account for 1.2% of total delays at major airports, with weather being the primary cause of delay. The Senior Roundtable Forum, implemented during the September peak travel period, has been instrumental in fostering a shared understanding of weather disruptions, collaborative development of mitigation strategies and consensus on GDP application. Compared to the same period last year, GDP application decreased by 50 hours this September despite over 100 additional daily aircraft movements across the four busiest airports.

Figure 18. Key Ground Delay Program (GDP) metrics.

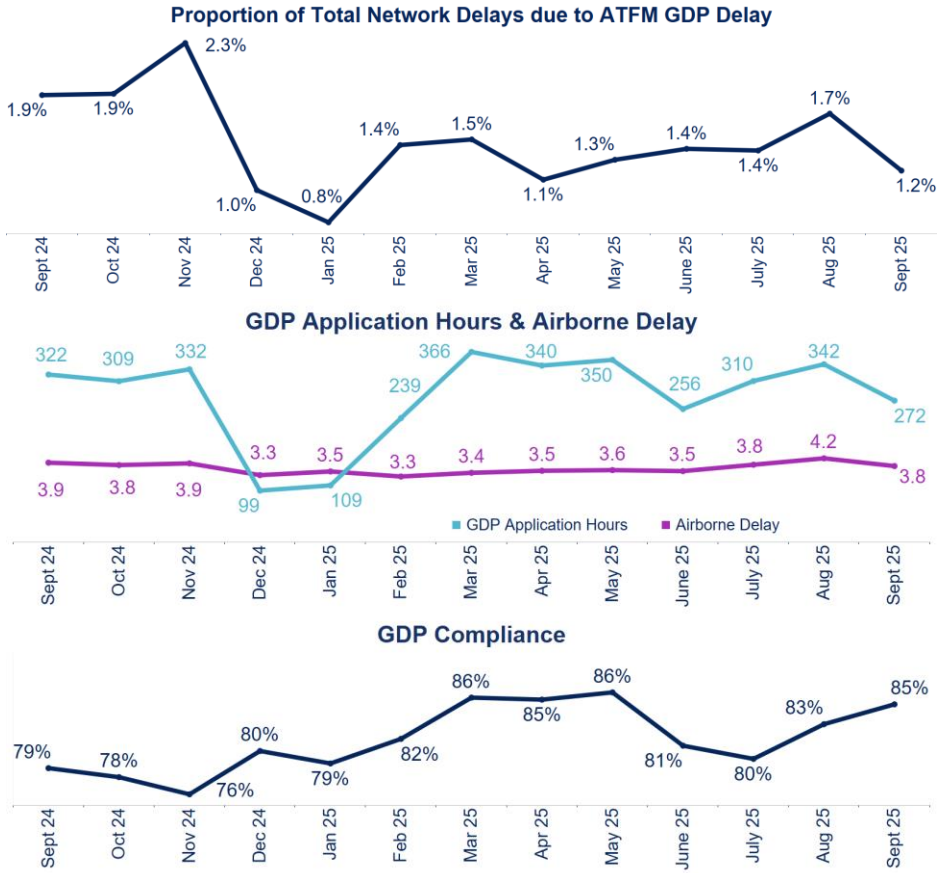
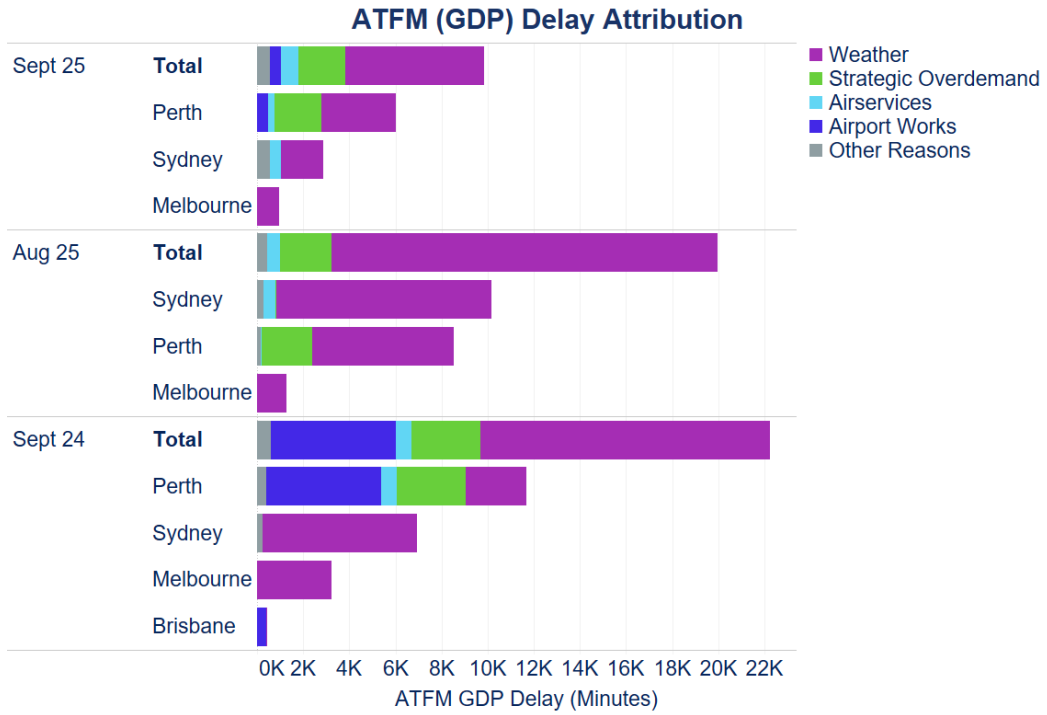


Figure 19. ATFM (GDP) delay by attribution overall and by airport.



Airports with nil ATFM delay are not shown.

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.

Airport Collaborative Decision Making (A-CDM)

Strong adoption of Airport Collaborative Decision Making (A-CDM) at Brisbane and Perth is delivering benefits, including enhanced situational awareness, stakeholder coordination and operational efficiency. At Perth, A-CDM replaced the previous Ground Delay Program for Departures (GDP-D) which was a modified version of the pre-tactical ATFM tool, to manage peak morning demand within the available airport capacity. A-CDM enables dynamic, real-time distribution of delays more equitably and optimises departure sequencing. Since its introduction, daily total ATFM departure delays have fallen from around 390 minutes (~4minutes per flight) to just 50 minutes (less than a minute per flight).

Figure 20. A-CDM metrics.

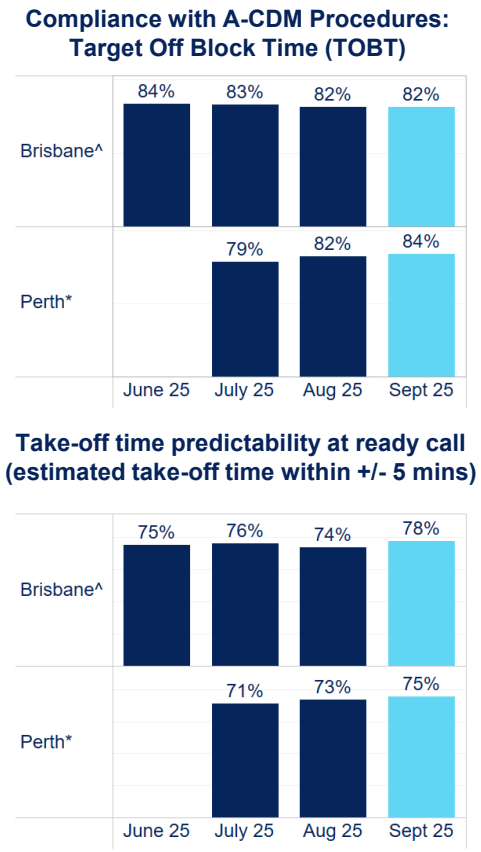
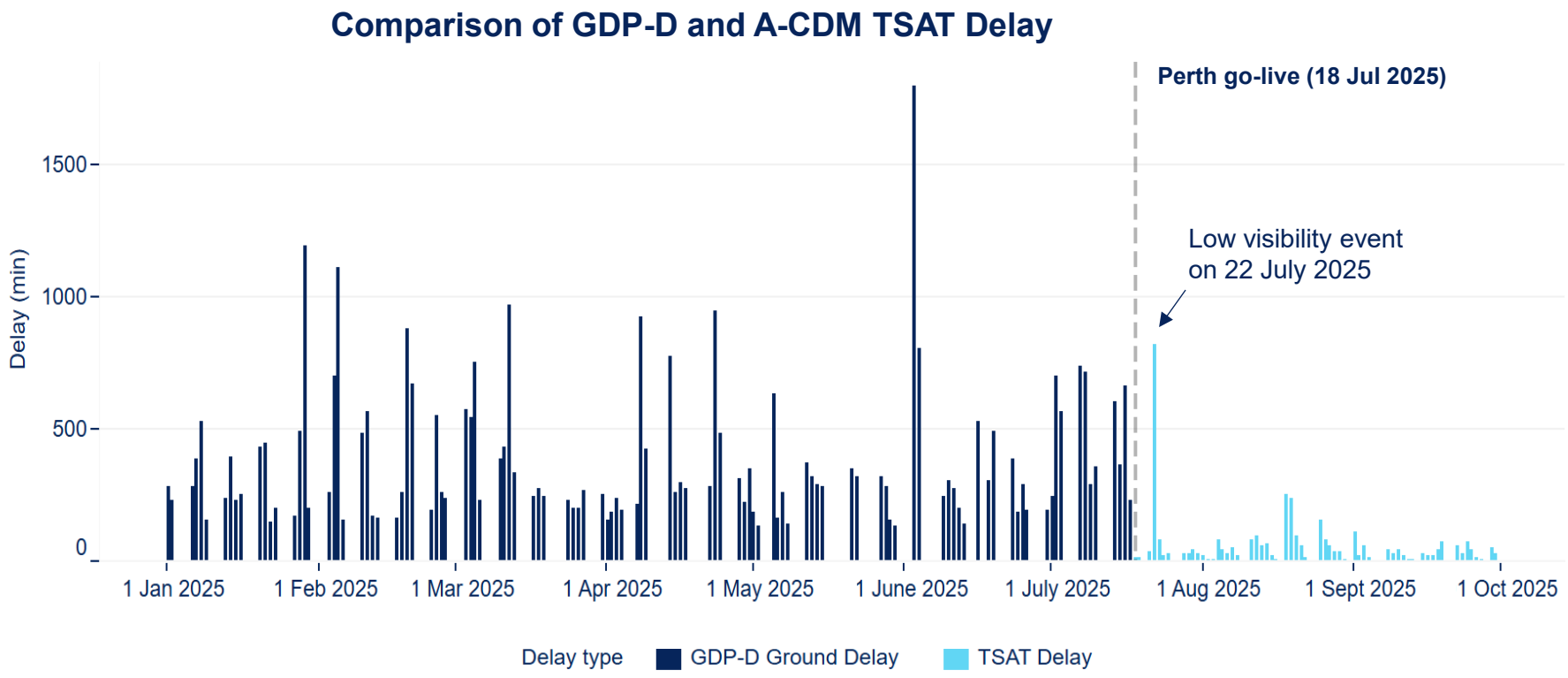


Figure 21. Total daily GDP departure program (GDP-D) delay and A-CDM Target Start-Up Approval Time (TSAT) delay from 1 January 2025 to 30 September 2025. Includes flights departing Perth during weekdays between 05:30am and 08:30am (GDP-D application times). Data before 18 July 2025 is based on the GDP-D, data after 18 July 2025 is based on A-CDM.

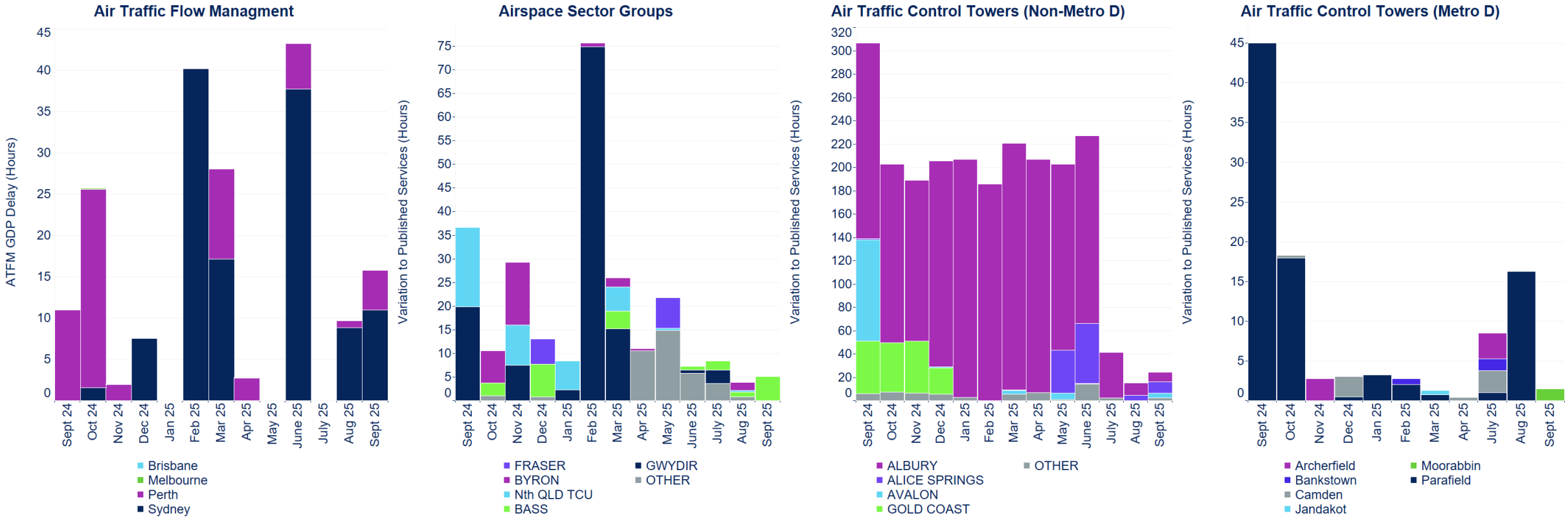


Source: Airservices ODAS and A-CDM. ^Brisbane A-CDM was implemented 10 May 2025. *Perth A-CDM was implemented 18 July 2025.

Air traffic service

In September 2025, service variations at air traffic control towers were at the lowest levels since July 2022, with over 90% reduction from the monthly average. However, unplanned staffing unavailability in Sydney Terminal Airspace on 12 and 19 September highlighted that resilience gaps remain. To strengthen resilience, we continue to progress active training and recruitment to enable robust standby arrangements and mitigate the risk of unforeseen disruptions.

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. 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)

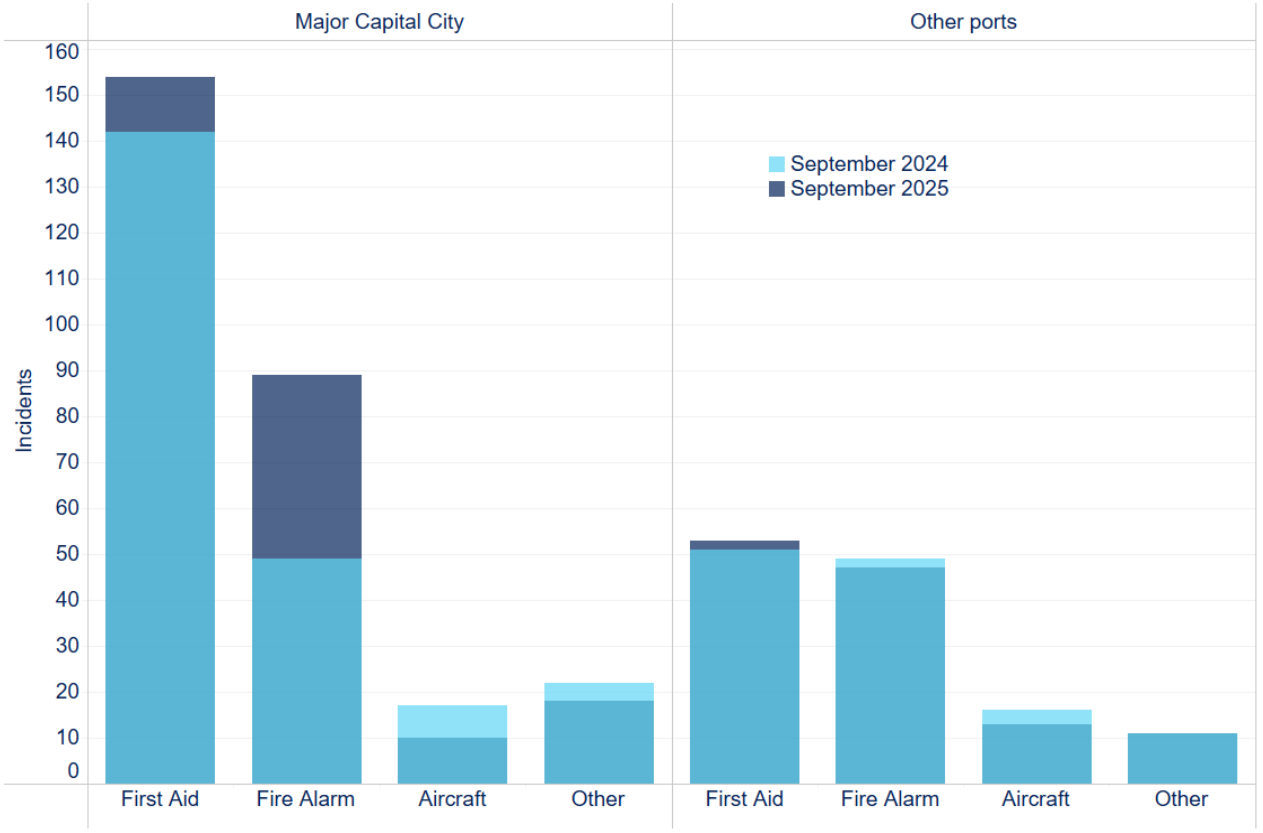
ARFF service availability reached its highest level in two years, reinforcing our ongoing commitment to ensure world-class emergency response capabilities critical to ensuring aviation safety and airport growth.

Figure 23. ARFFS service delivery metrics – monthly service availability (left) and number of emergency responses by type (right).

Monthly Service Availability (%)

Location	September 2024	August 2025	September 2025
Adelaide	100.00	99.99	99.92
Alice Springs	100.00	100.00	100.00
Avalon	99.74	100.00	100.00
Ayers Rock	100.00	100.00	100.00
Ballina	95.22	100.00	100.00
Brisbane	100.00	100.00	100.00
Broome	96.70	94.02	100.00
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	95.62	99.04	100.00
Gold Coast	99.68	100.00	100.00
Hamilton Island	97.48	98.71	100.00
Hobart	95.53	99.93	100.00
Karratha	99.41	100.00	100.00
Launceston	100.00	100.00	100.00
Mackay	100.00	100.00	99.74
Melbourne	100.00	100.00	100.00
Newman	100.00	100.00	100.00
Perth	100.00	100.00	100.00
Port Hedland	94.78	100.00	100.00
Proserpine	100.00	100.00	100.00
Rockhampton	100.00	100.00	100.00
Sunshine Coast	100.00	100.00	99.89
Sydney	100.00	100.00	100.00
Townsville	100.00	99.69	100.00
All Airports	99.84	99.96	99.99

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

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