

Australian Aviation Network Overview

October 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

Australian aviation recorded another strong month in October, supported by major events such as the National Rugby League (NRL) Grand Final and school holidays early in the month. International travel has sustained 9% year-on-year growth, and this momentum is expected to be maintained, supported by regional trade cooperation reinforced at the recent APEC Summit. Fleet renewal is enabling greater capacity on busy domestic routes and first-ever international services from secondary airports, such as the Bali-Newcastle route with A321LR aircraft.

This growth is being balanced with community and sustainability initiatives, including enhanced engagement and transparent reporting of Noise Abatement Procedures across nine metropolitan cities.

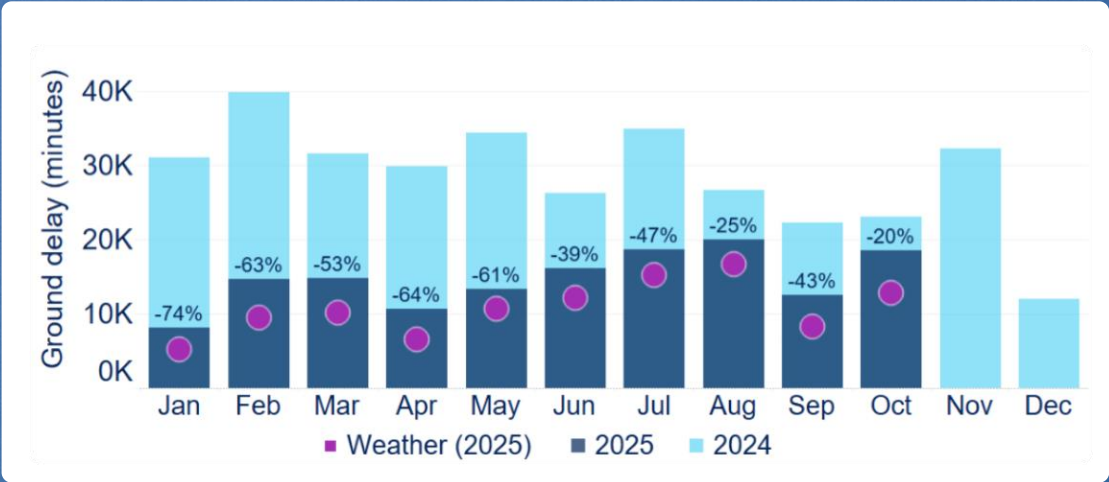
Industry on-time performance remains above 2024 levels, despite weather challenges including strong crosswinds experienced at Sydney on five days. Enhanced collaborative practices from senior-level network coordination representatives in Airservices, airlines, airports and the Bureau of Meteorology are now embedded in daily operations. Passenger-centric application of Ground Delay Programs (GDPs) and proactive scenario-planning during peak demand and capacity constrained periods has resulted in a 20% reduction in ground delays year-on-year in October.

With Airport Collaborative Decision Making (A-CDM) now operational at three of Australia's busiest airports, we are seeing improved network predictability and delay reduction. Since implementation, Perth's daily departure delays have fallen by over 85%, Brisbane's on-time performance improved by nine points, and Sydney saw smoother traffic flows during constrained operations.

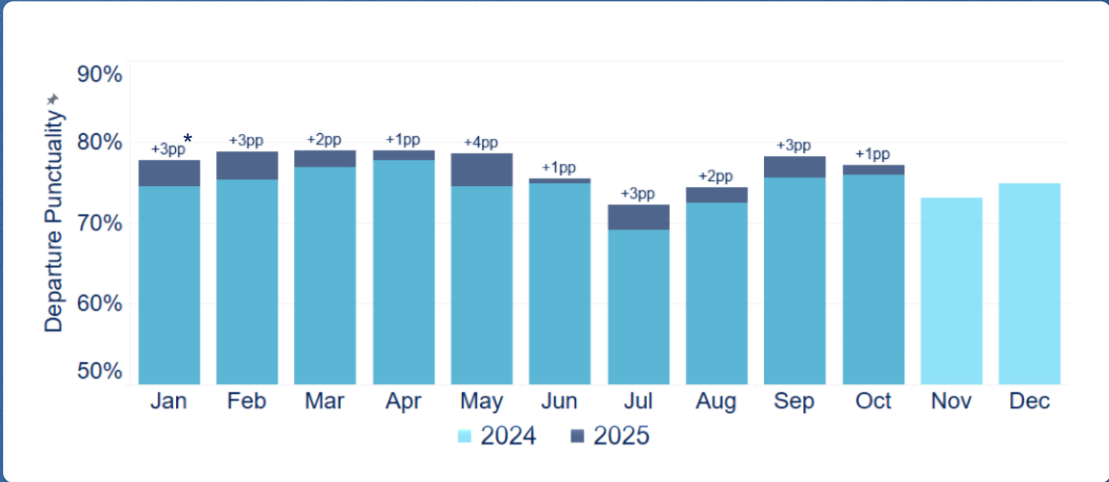
Air traffic service variations have reduced by 95% this month compared to October last year, reflecting sustained investment in recruitment and training. Sydney experienced staffing challenges on four days accounting for 0.3% of total delays at the airport, with Airservices impacts ranging from a fully attributable GDP on 15 October to minor ground delays. To close resilience gaps, accelerated cross-training of air traffic controllers for priority locations such as Sydney remains a key focus. Aviation Rescue Fire Fighting service availability remains high, ensuring rapid and reliable emergency response across the country.

Network performance snapshot (year-on-year comparisons)

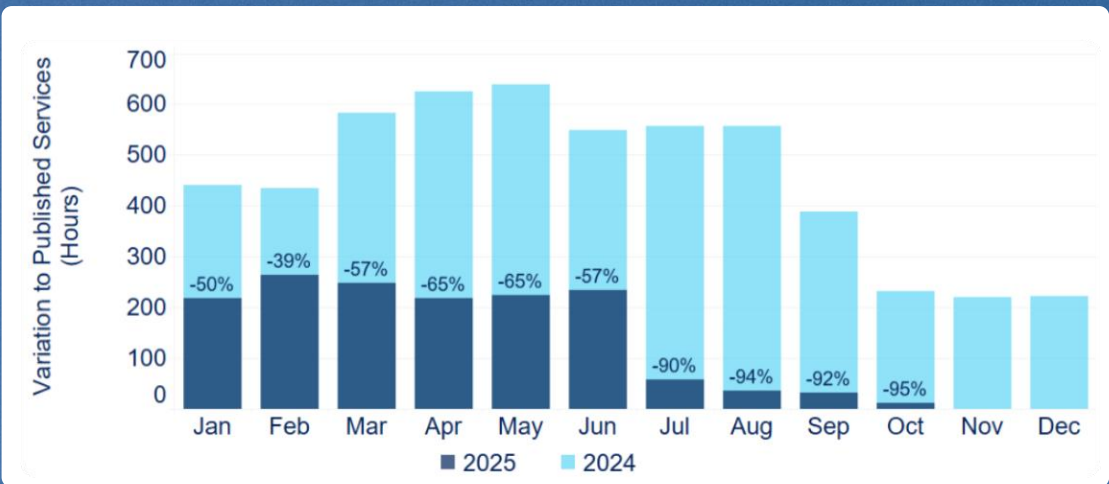
Total Air Traffic Flow Management Delays



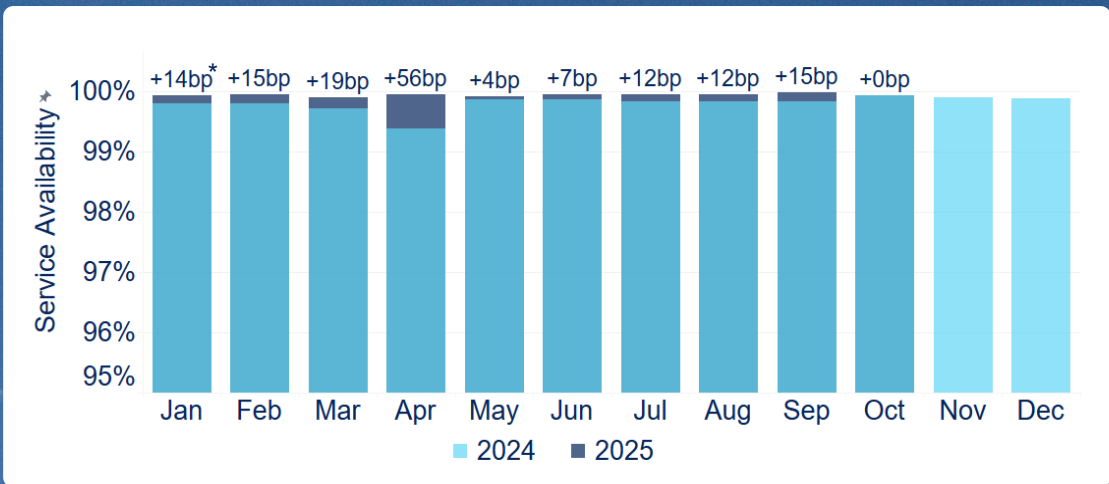
Departure Punctuality (First Flight Out)



Service Variations (Airspace & Tower)



Aviation Rescue and Fire Fighting Service Availability



*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



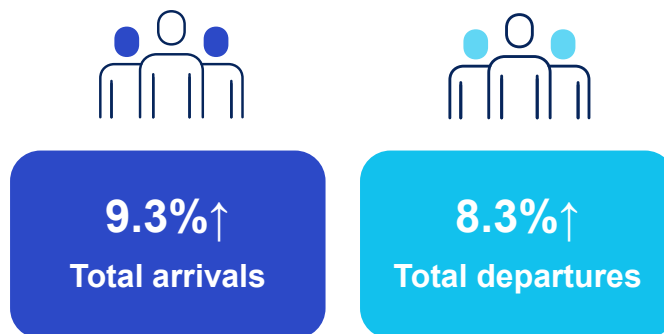
Economic factors

Australia's aviation sector continues to benefit from resilient economic conditions and international travel demand. Although inflation has edged up slightly, stable monetary policy and deepening regional trade ties, reinforced by commitments at the recent APEC Summit, are supporting a positive outlook for the industry.

Figure 1. Trade and investment highlights

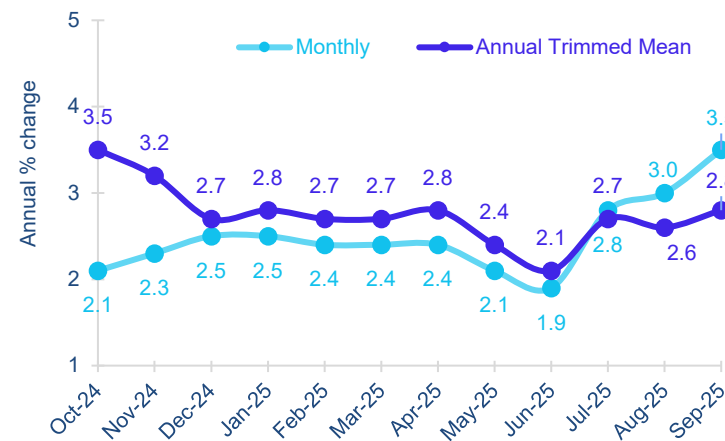


Figure 4. Year-on-year changes in international passenger arrivals and departures



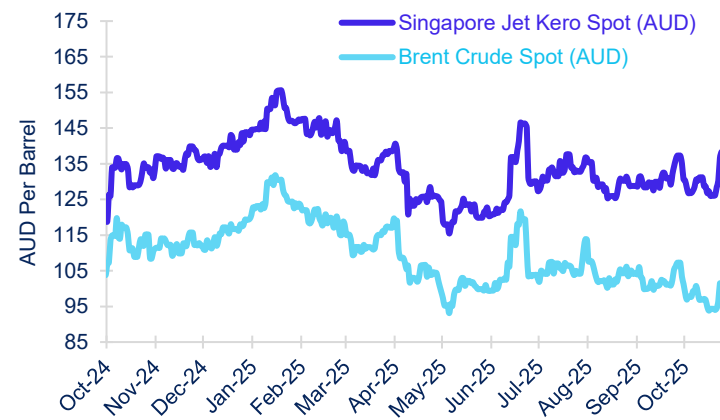
Source: Australian Bureau of Statistics ([website](#)) – latest data released 14/10/2025

Figure 2. Consumer Price Index (CPI) Indicator.



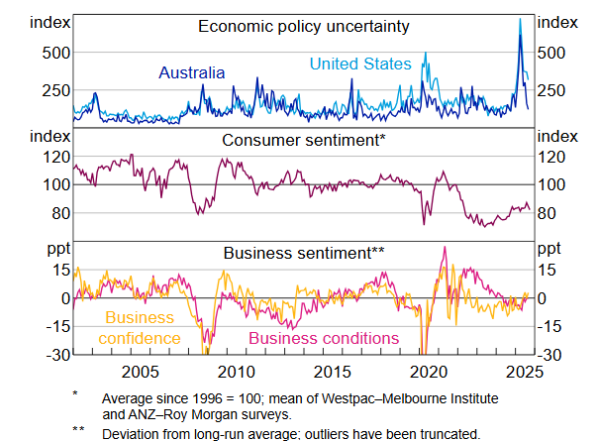
Source: ABS ([website](#)) – latest data to September 2025 as at 29/10/2025

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



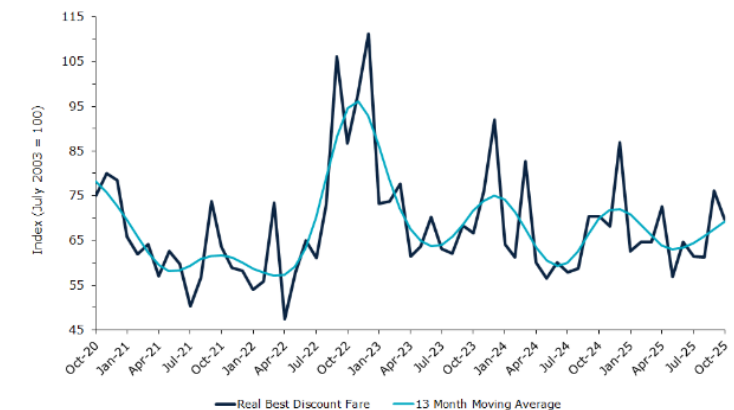
Source: Bloomberg – latest data as at 5/11/2025

Figure 3. Survey Indicators and Uncertainty



Source: Reserve Bank of Australia ([website](#))

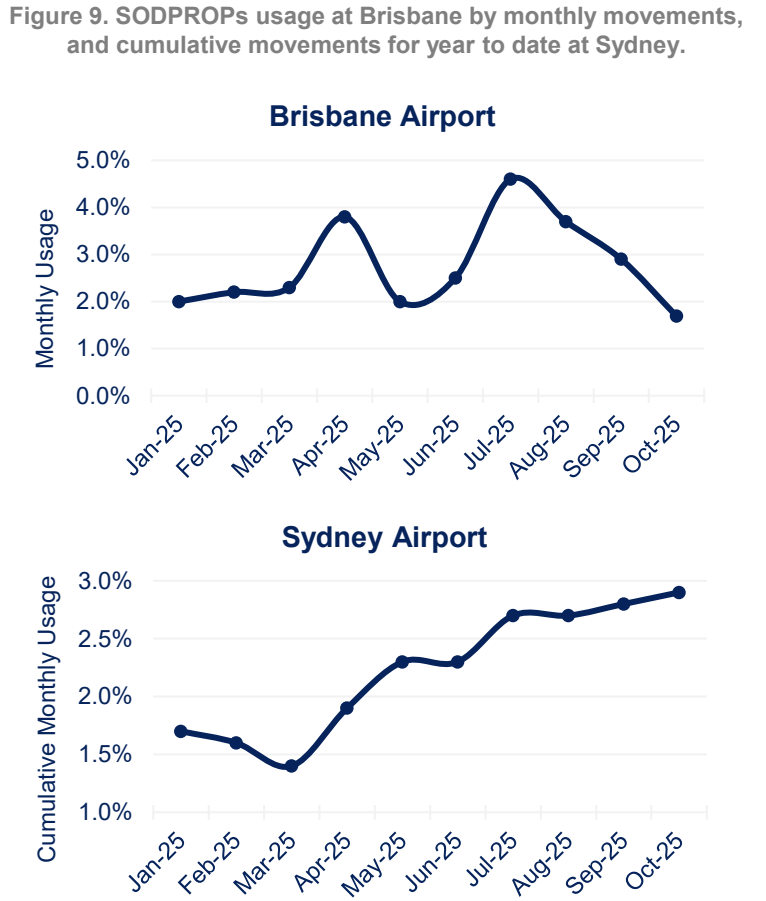
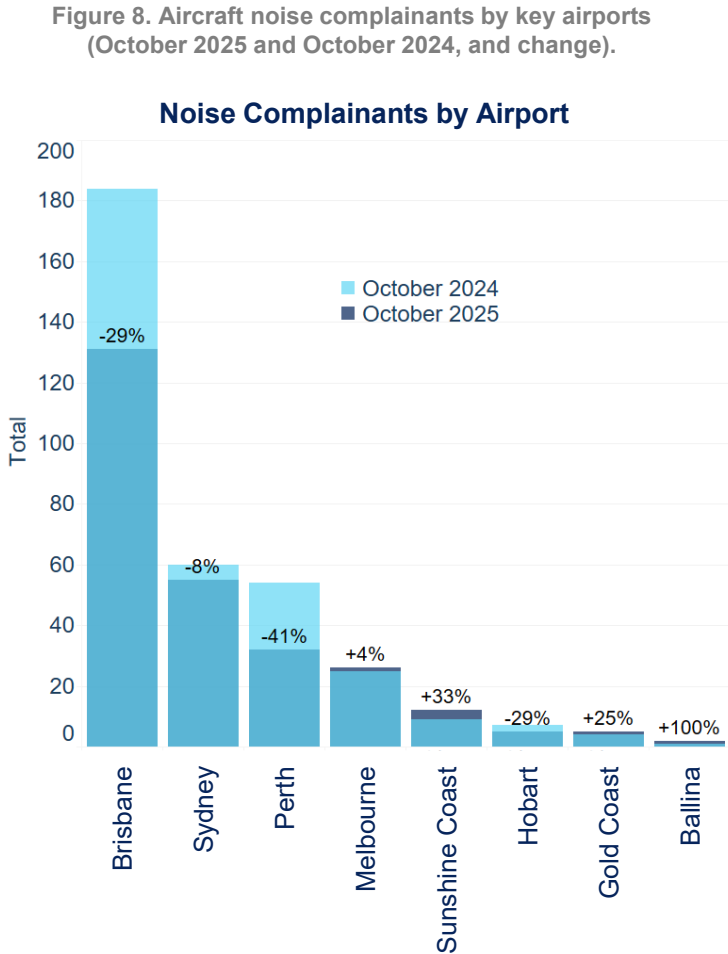
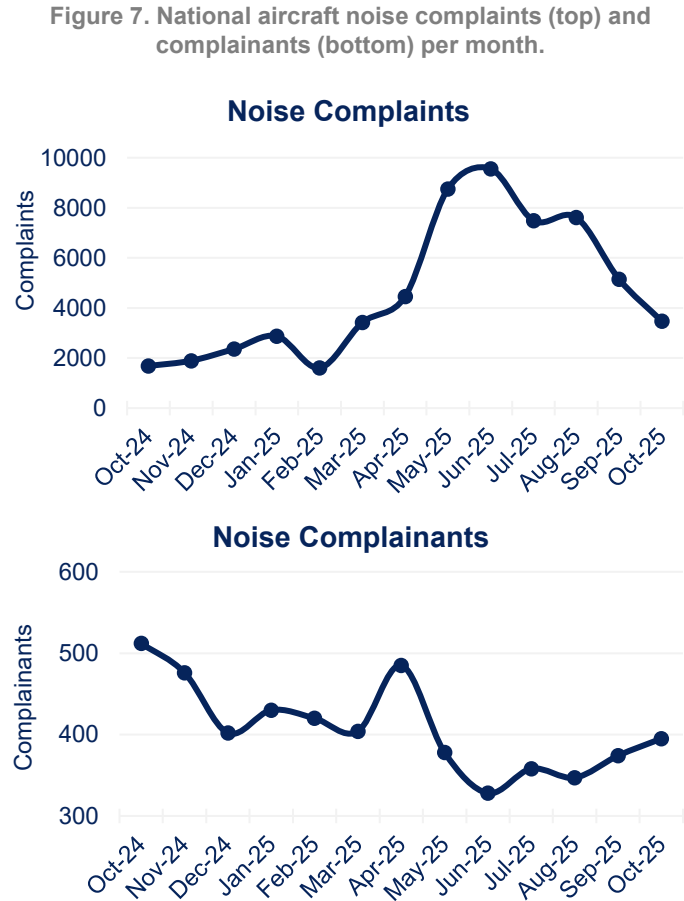
Figure 6. Domestic airfares (real best discount).



Source: BITRE ([website](#)) – latest data as at 30/10/2025

Social factors: aircraft noise

Aircraft noise complaints have recently declined, indicative of improved engagement and proactive reporting such as adherence to Noise Abatement Procedures now in place at nine metropolitan airports. With traffic growth and major airport expansions underway, sustained national efforts are essential to balance industry development with minimising noise impacts on local communities.

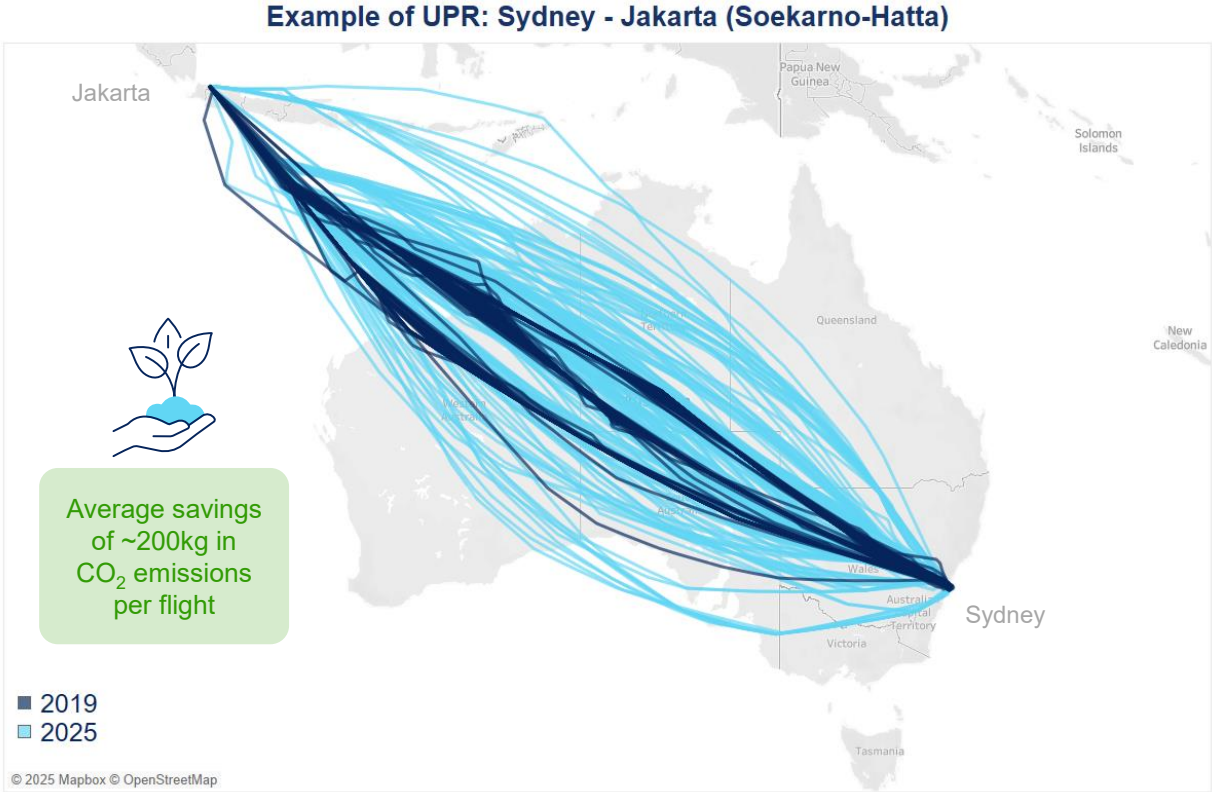
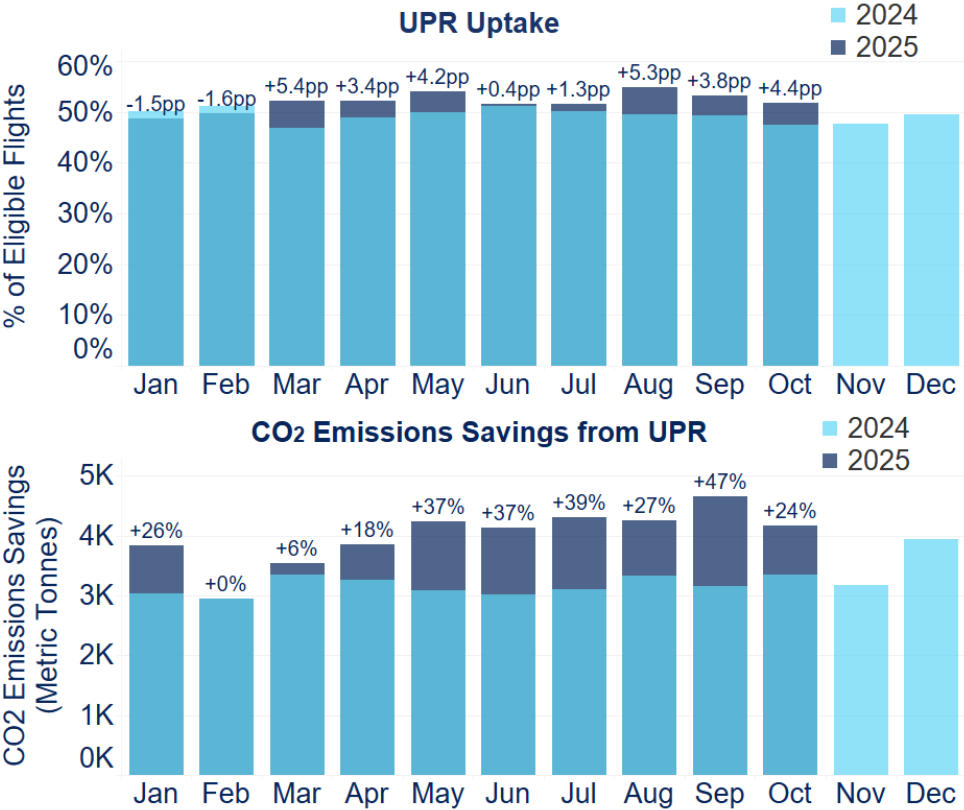


Source: Airservices' Noise Complaints and Information Service (NCIS) and Airservices' Aircraft in Your Neighbourhood tool ([website](#)).

Social factors: aircraft emissions

The expansion of User Preferred Routes (UPRs) from 38 to 70 routes across Asia Pacific is delivering efficiency and environmental benefits by enabling flights to follow optimal paths given prevailing conditions rather than fixed routes. On high-demand international sectors such as Sydney–Jakarta, airlines are saving up to 200 kg of CO₂ per flight. Flights in the trial have contributed 3% of total CO₂ emissions saved by UPR usage this year in Australian airspace in support of greener aviation.

Figure 10. User Preferred Routes (UPR) measures: total percentage of eligible flights using UPRs (top left), total CO₂ emissions savings (bottom left), and average CO₂ savings in 2025 for an example Sydney-Jakarta flight (right).



Source: Eligible flights include all jet operations over oceanic and cross-continental airspace. Eligibility is independent of technology, training, or other operational constraints. CO₂ emissions savings are measured across the entire flight segment within Australian airspace.

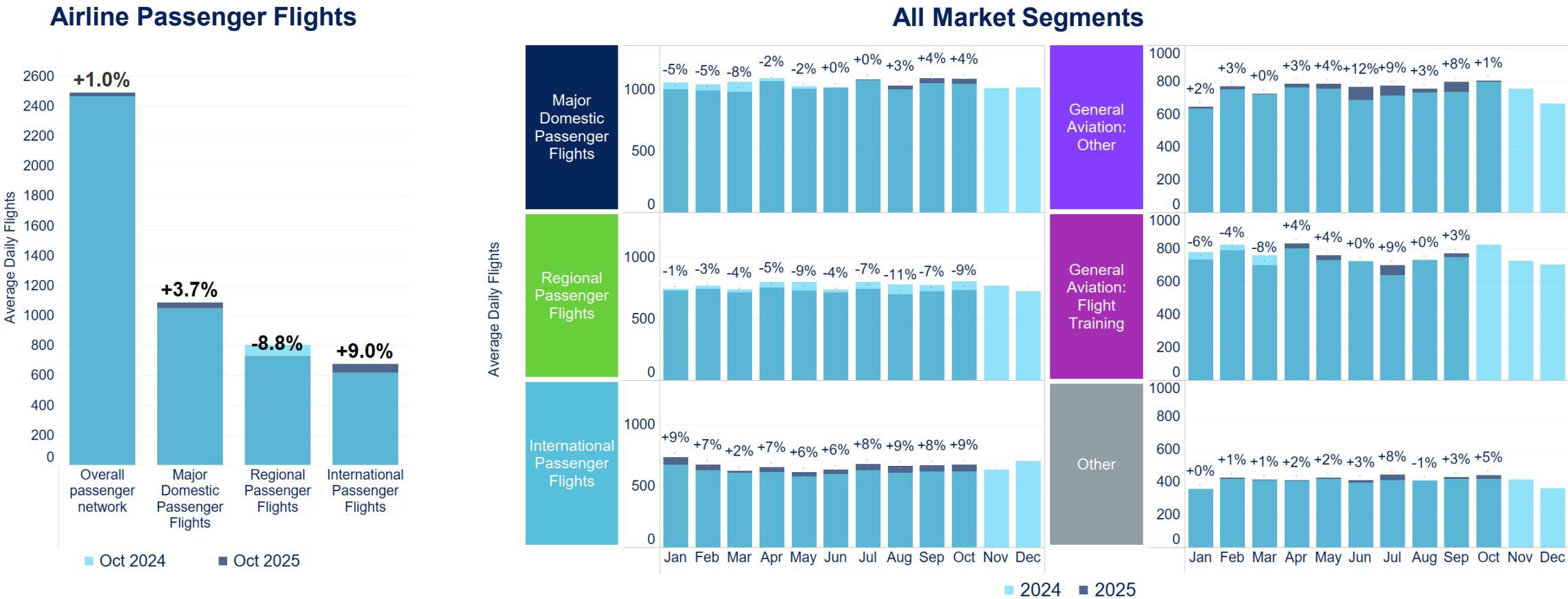
Australian aviation and regional context



State of Australian aviation growth

October started strong, driven by NRL finals and school holidays, reinforcing the leisure-led domestic travel pattern. Activity eased in the second half, with daily average flights down around 4% (90 flights) compared to the first half. International traffic maintained strong growth, averaging nearly 9% year-on-year over the last four months. However, regional activities remain constrained by fleet consolidation, rising operating costs and weaker-than-expected business travel outside the mining sector.

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

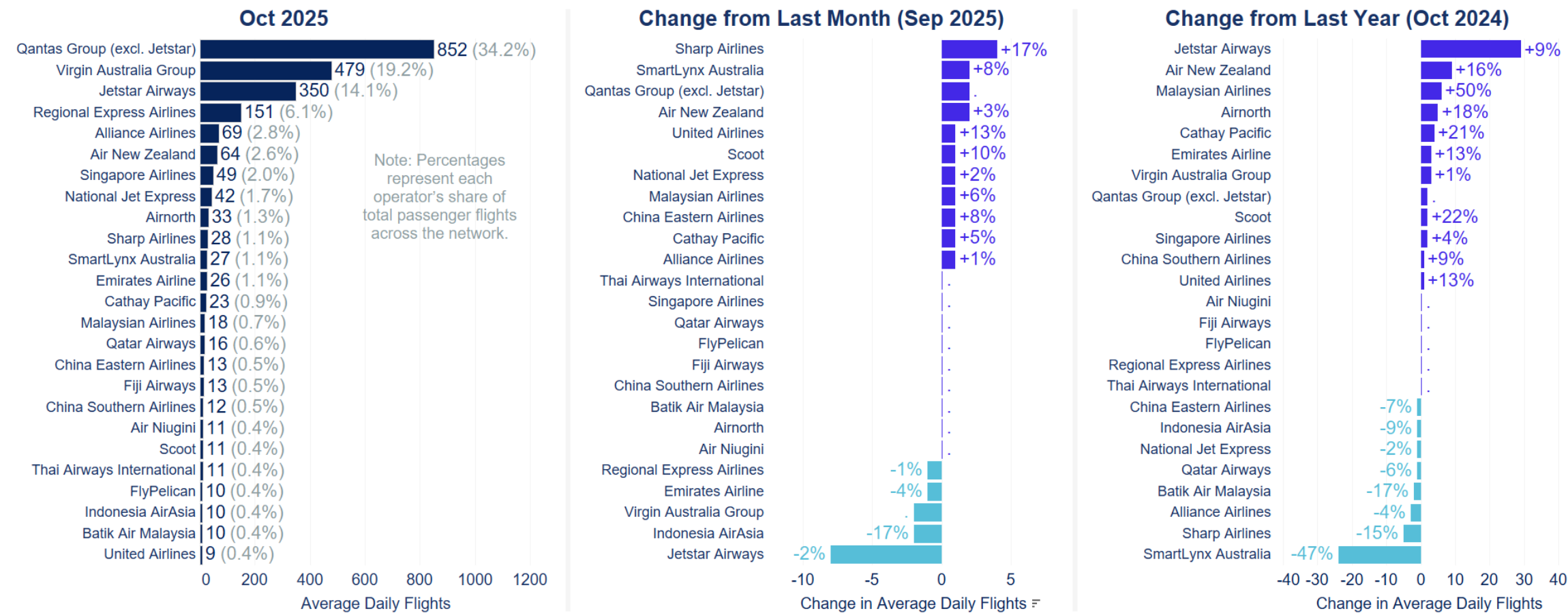


Source: Airservices ODAS (excludes helicopters). General Aviation: Flight Training is one month in arrears.

Top aircraft operators

Airline growth continues to be driven by low-cost leisure travel, expanded short-haul international routes, well-connected hub airports and the resources sector.

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

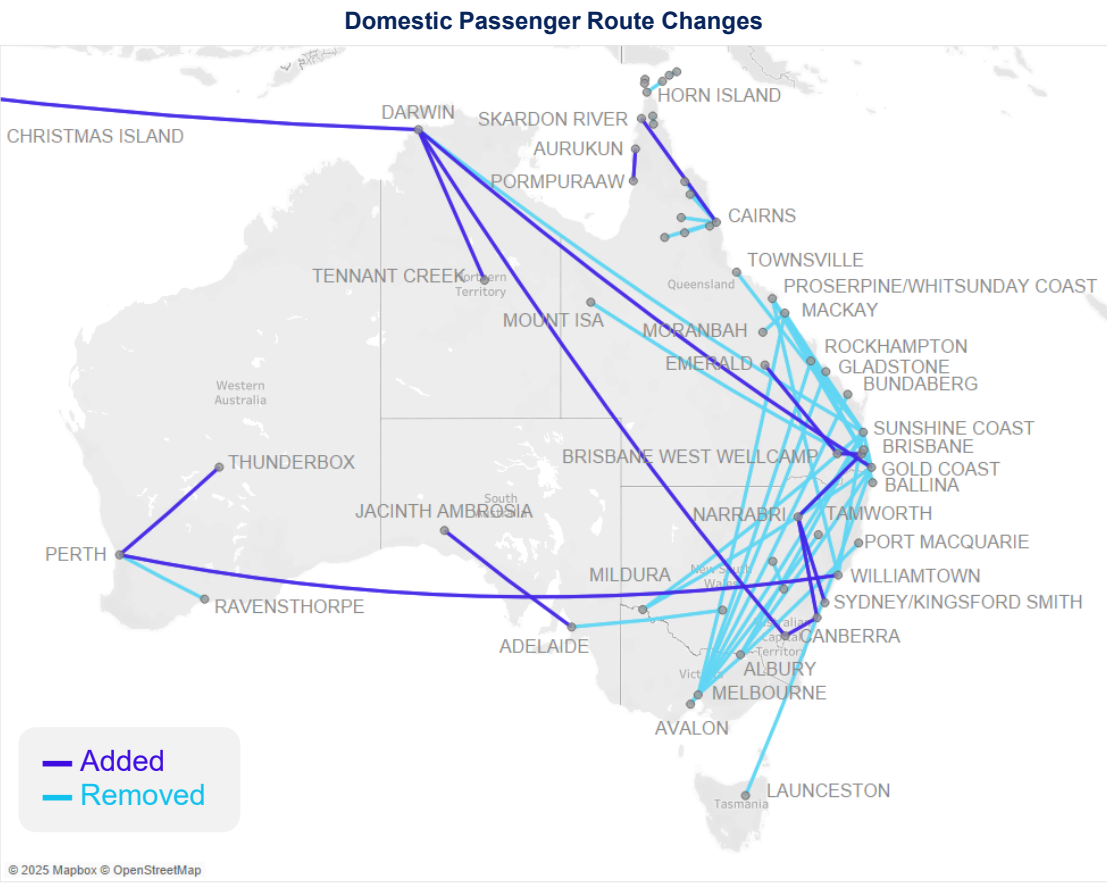


Source: Airservices ODAS (includes airline flights only). Only top 25 airlines by flights are shown. Flights operated on wet-lease arrangements are counted towards the operators with the assigned call signs.

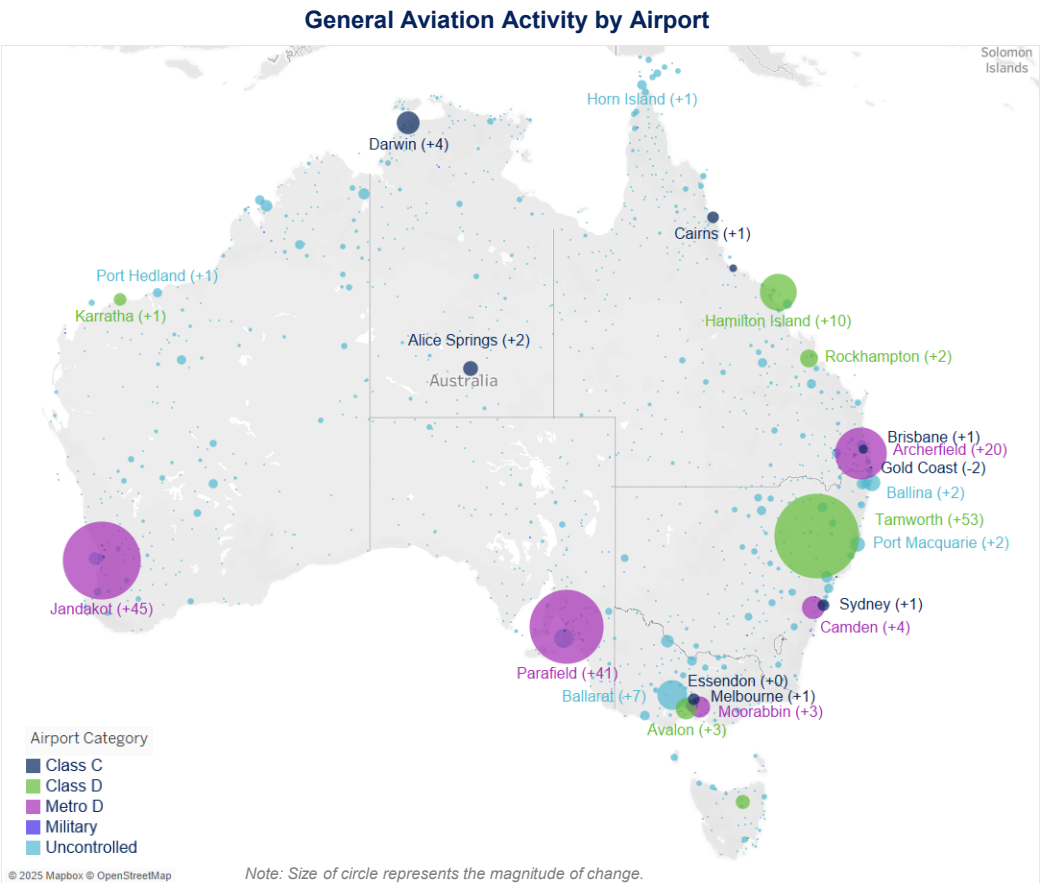
Domestic network

The regional network has shifted notably this year, with most new routes originating from capital cities while direct region-to-region connections have declined. Flight training activity at several Metropolitan D aerodromes is growing strongly, highlighting the critical role general aviation plays in supporting the future of aviation.

Figure 13. Domestic passenger routes added or removed January to October 2025 vs January to October 2024 (left) and general aviation growth in average daily movements at airports, comparing 12 months to September 2025 to 12 months to September 2024 (right).



Source: Airservices ODAS (includes airline movements only). Only routes with at least 1 average weekly flight are included.

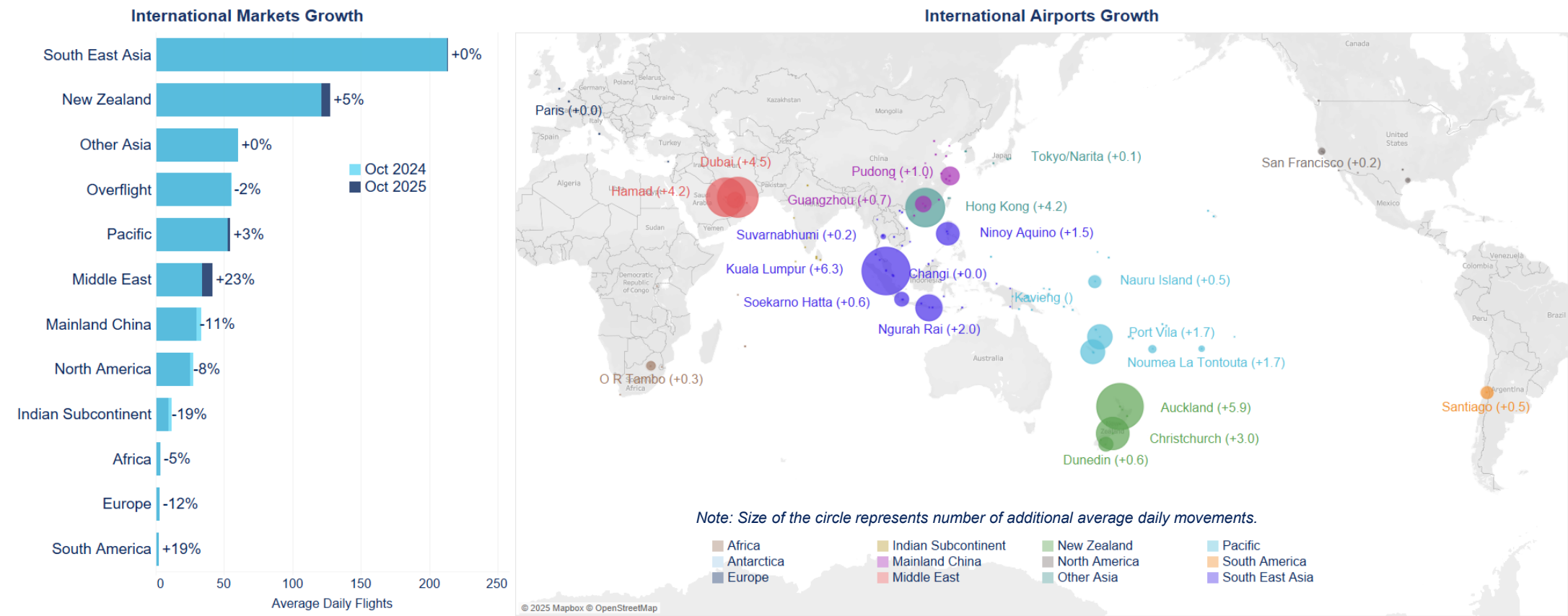


Source: Airservices ODAS (includes general aviation movements, excludes helicopters). Movements include circuits. *General Aviation: Flight Training* is one month in arrears.

International markets

International traffic grew 9% year-on-year this month, with inbound travel led by New Zealand, China and the United States, while outbound demand was strongest for Indonesia, New Zealand and Japan. Strategic developments, such as Australia’s free trade agreement with the United Arab Emirates and the recent 2025 Asia Pacific Summit commitments, are expected to support ongoing international growth.

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

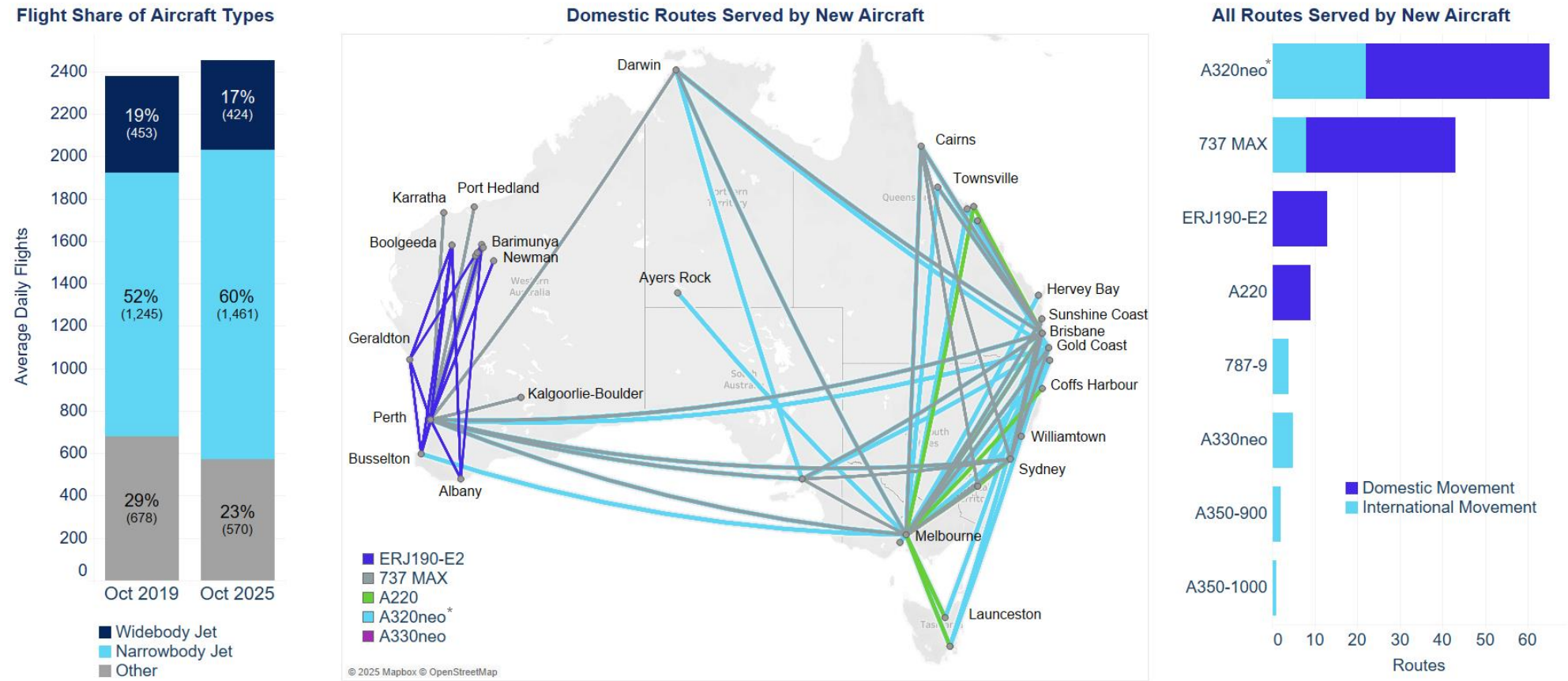


Source: Airservices ODAS (includes airline flights only). Overflights are those transiting the airspace without landing (these are not included in the map). For multi-leg flights, legs that start and end outside Australian airspace are not included.

Network fleet

Australia’s domestic fleet is dominated by narrowbody jets, with flights on these aircraft now well above 2019 levels. Airlines are deploying new aircraft on high-demand routes, particularly for capital-regional and mining connectivity, and introducing new international services from secondary airports such as Newcastle–Bali. Across Asia Pacific, some carriers are accelerating fleet orders despite supply constraints to secure future capacity and improve efficiency.

Figure 15. Comparison of flight share by aircraft type between October 2025 and October 2019 (left) domestic routes served by new aircraft (middle) and all routes served by new aircraft (right) in October 2025.



Source: Airservices ODAS (includes airline flights only) and Centre for Aviation Fleet (CAPA) data, as of 6 November 2025. New aircraft include those less than 0.5 years in age.
* Includes the A321XLR.



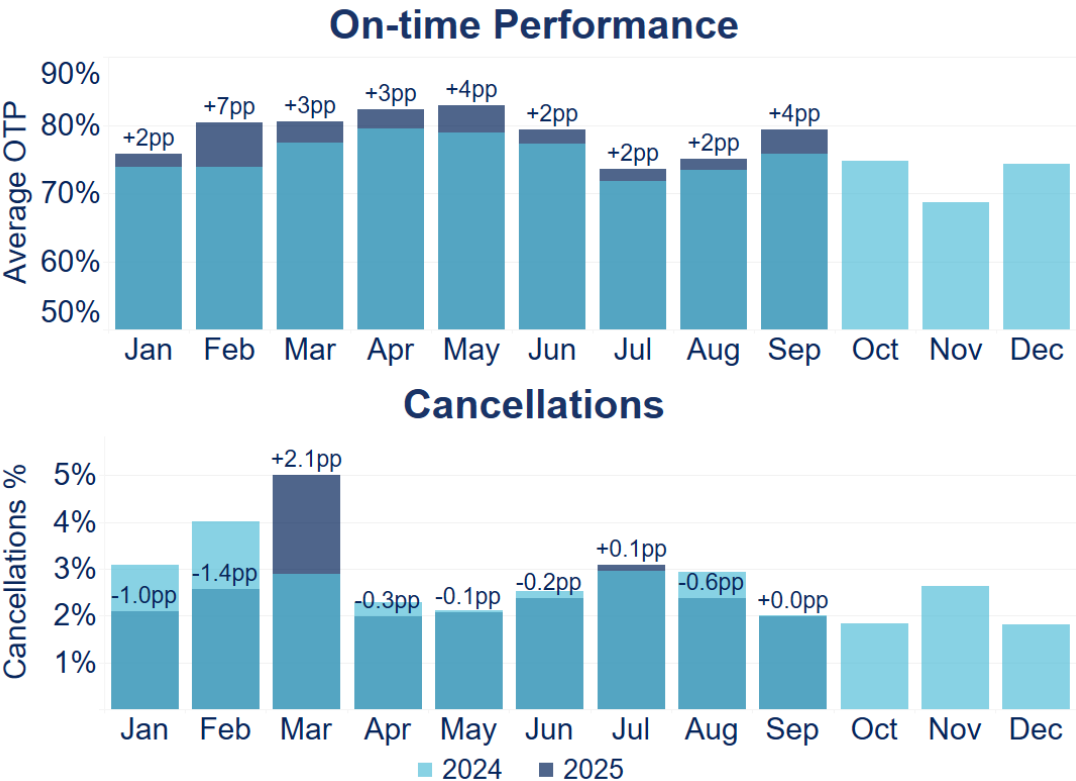
Australian aviation network performance



Industry performance

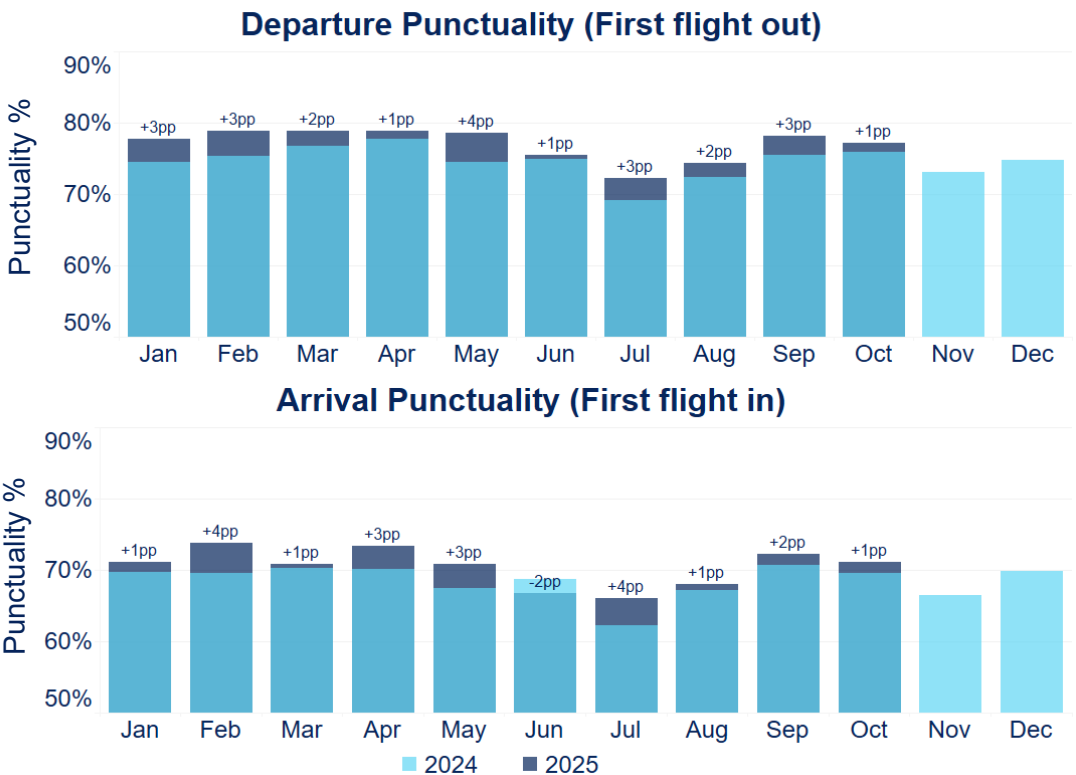
Industry on-time performance remains above 2024 levels. Despite weather challenges such as strong crosswinds at Sydney, senior-level network coordination with industry during this October peak period delivered better outcomes than the same period last year. These collaborative practices are now embedded in daily network management, supporting more resilient and passenger-centric operations.

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



Source: BITRE ([website](#)). Data available up to September 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 October 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 Air Traffic Flow Management process.

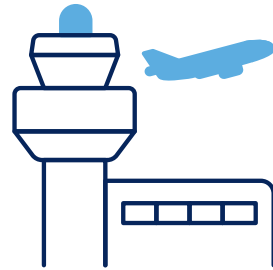
Network management process

Airservices collaborates closely with airlines and airports to balance scheduled demand with available runway capacity. An important 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

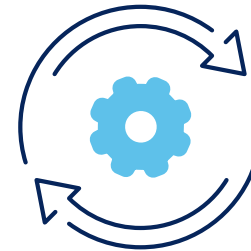
Strategic slot allocation is managed by Airport Coordination Limited (ACL) for Sydney and Capacity Optimisation Group (COG) for Melbourne, Brisbane and Perth – upon which airline **flight schedules** are then based. Airlines send their final flight schedules to Airservices Network Operations Management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

Air Traffic Flow Management (ATFM)

October recorded a 20% year-on-year reduction in ground delays at the four major airports with airborne delays remaining at similar levels to the previous year. Weather remains the dominant factor, contributing to nearly 70% of all ground delays this month.

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

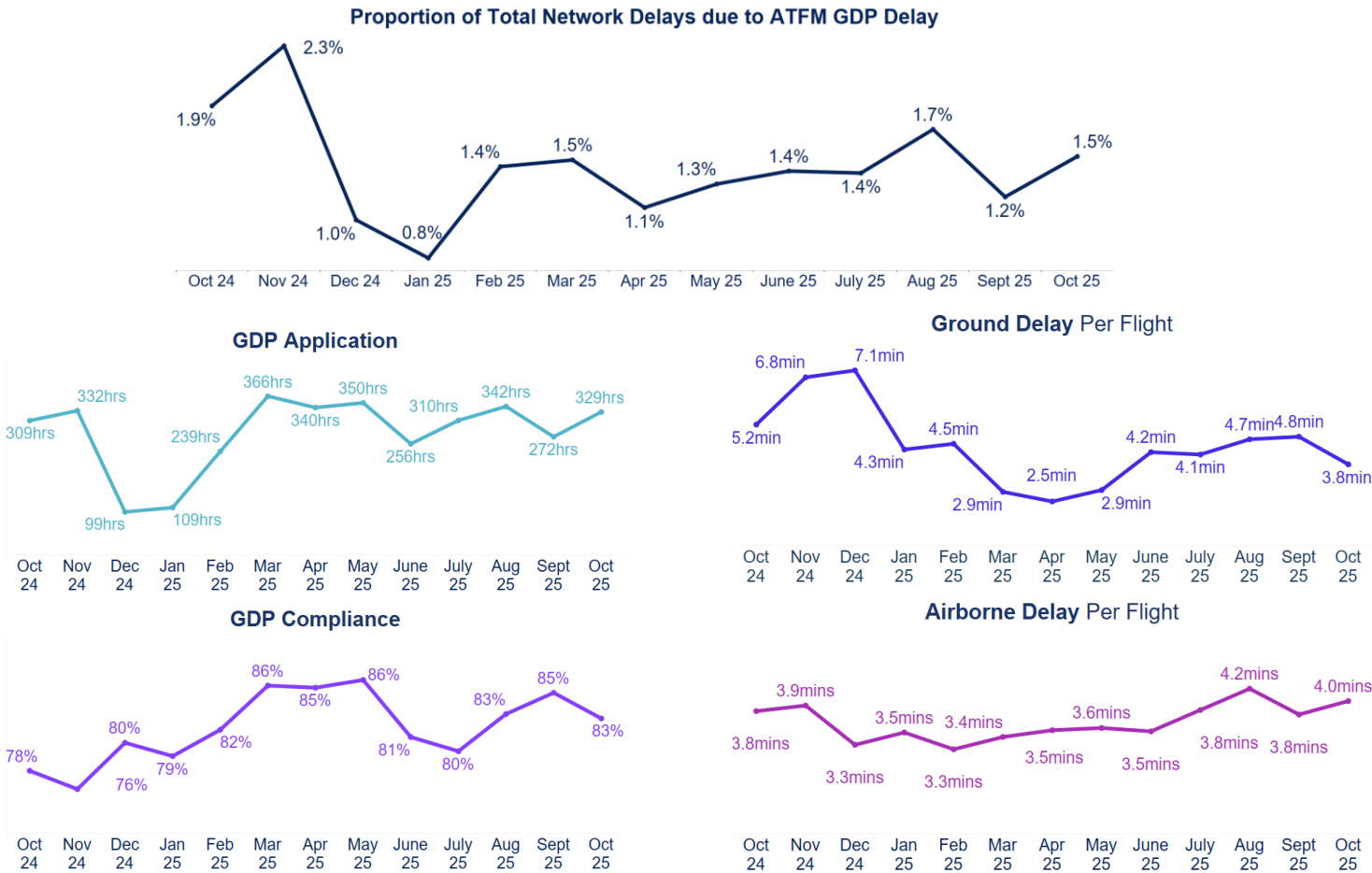
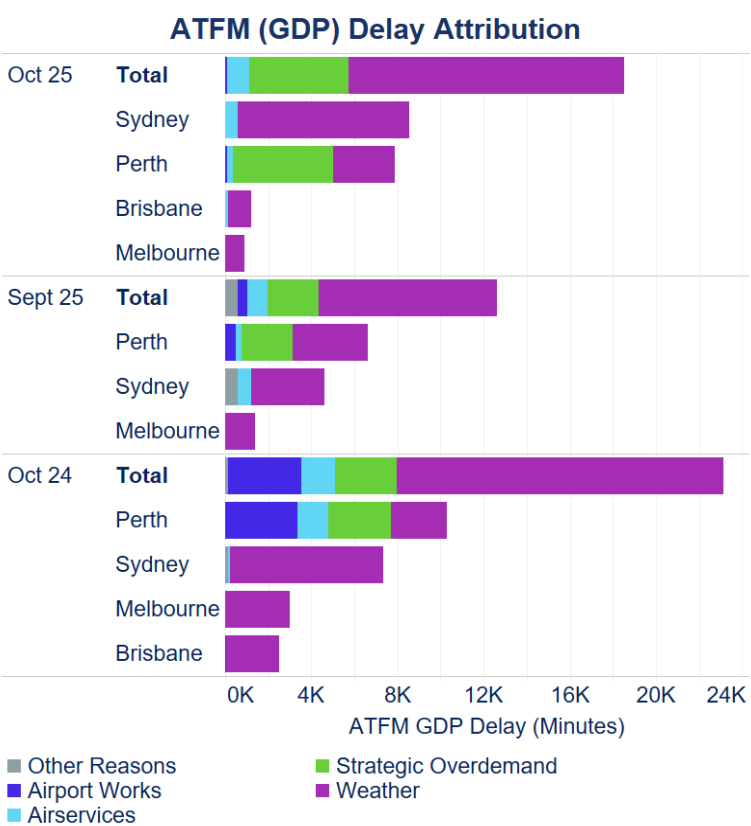


Figure 19. ATFM (GDP) delay by attribution overall and by airport.



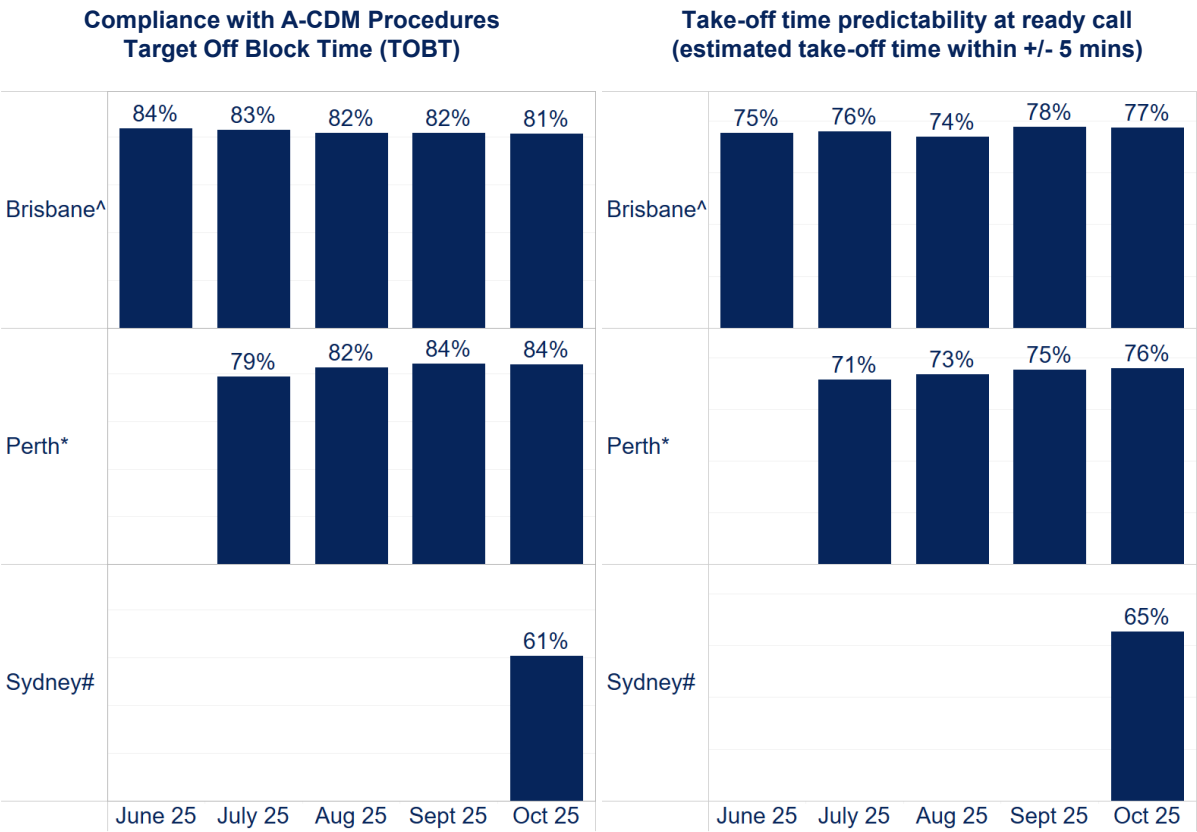
Airports with nil ATFM delay are not shown.

Source: Aircservices ODAS. GDP compliance represents the proportion of flights into an airport that departed compliant with their assigned GDP slot. Airborne delay per flight is measured by the 75th percentile, ground delay per flight is measured by the average.

Airport Collaborative Decision Making (A-CDM)

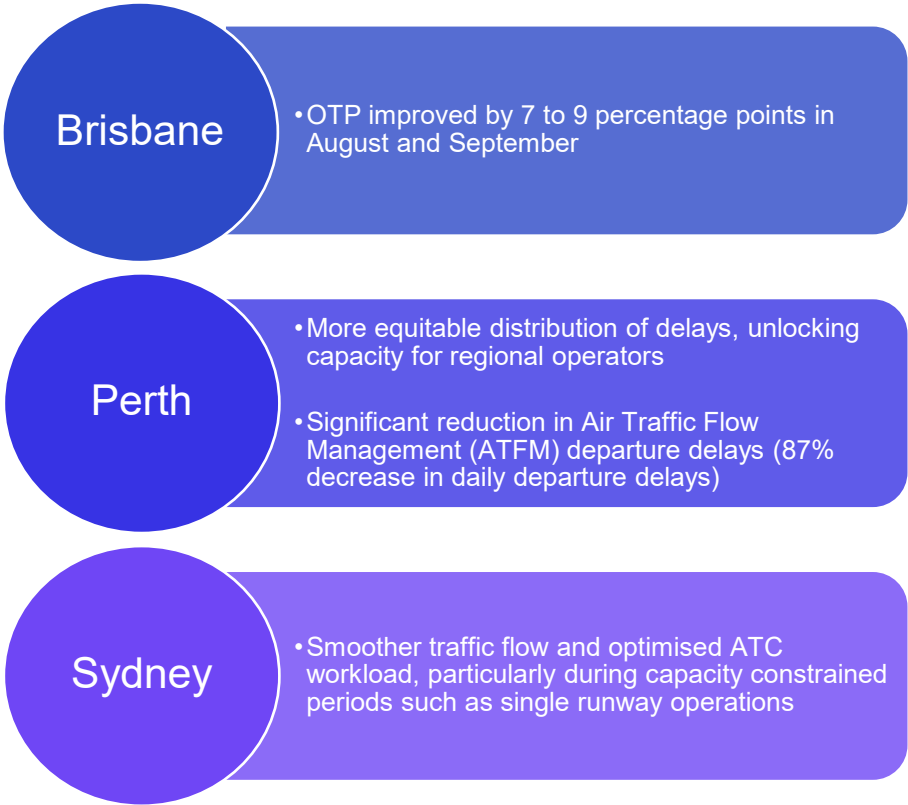
With A-CDM now operational at three of Australia’s busiest airports, improved network predictability and operational efficiency is evident across the network. At Perth, daily ATFM delays have decreased from 390 to just 50 minutes. Brisbane has seen a nine-point improvement in monthly on-time performance since implementation. At Sydney, A-CDM enabled smoother traffic flows and reduced air traffic management workload during constrained periods such as single-runway operations on 22 October.

Figure 20. A-CDM metrics.



Source: Airservices ODAS and A-CDM. ^Brisbane A-CDM was implemented 10 May 2025. *Perth A-CDM was implemented 18 July 2025.
Sydney A-CDM resumed on 11 October, following the initial introduction on 7 September.

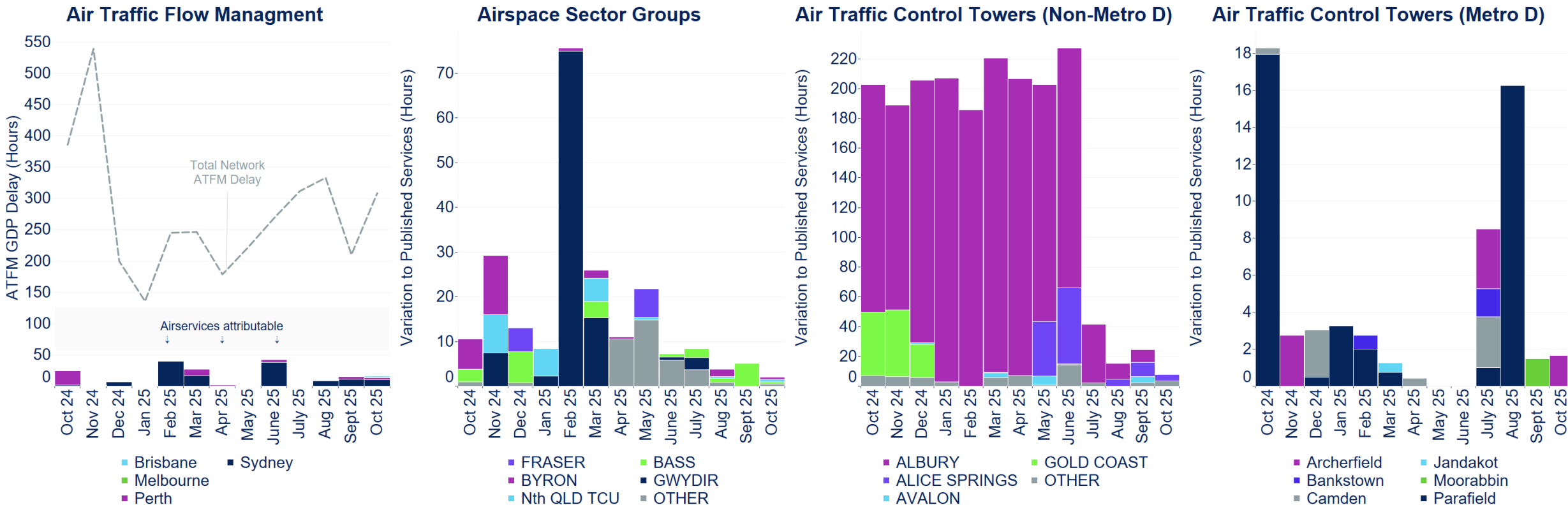
Figure 21. Examples of early A-CDM benefits.



Air traffic service provision

Service variations across airspace and towers have dropped by 95% year-on-year, demonstrating overall improved operational consistency. Sydney experienced staffing challenges on four days accounting for 0.3% of total delays at the airport, with Airservices impacts ranging from a fully attributable GDP on 15 October to minor ground delays. To strengthen resilience, accelerated cross-training of air traffic controllers for priority locations such as Sydney remains a key focus.

Figure 22. Airservices attributable hours of ATFM GDP delay (left) and variation from published levels across Airspace Groups (centre) and ATC Towers (right).

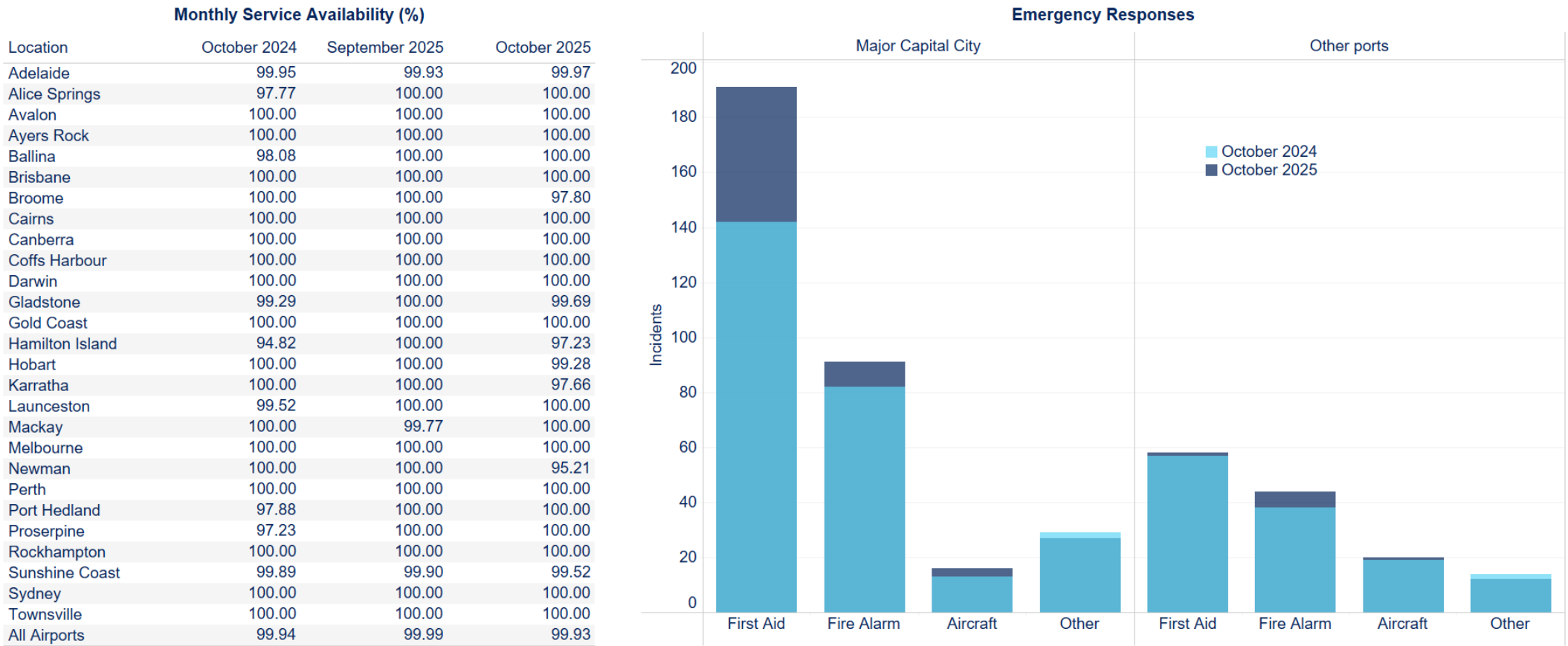


Source: Airservices ODAS. Variations to published services comprise of Temporary Restricted Areas and tower closure periods. During the periods of variations to published services at regional aerodromes, services in adjacent Class G airspace are generally unaffected (e.g. provision of flight, traffic information and safety alerting). Service variations are with respect to published services as per ERSAs 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, ensuring rapid and reliable emergency response across Australia.

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



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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