



# BARA

Board of Airline Representatives of Australia Inc

The **leading** voice of airlines



## **10 years of Australia's international aviation to 30 June 2015**

**BARA Research**

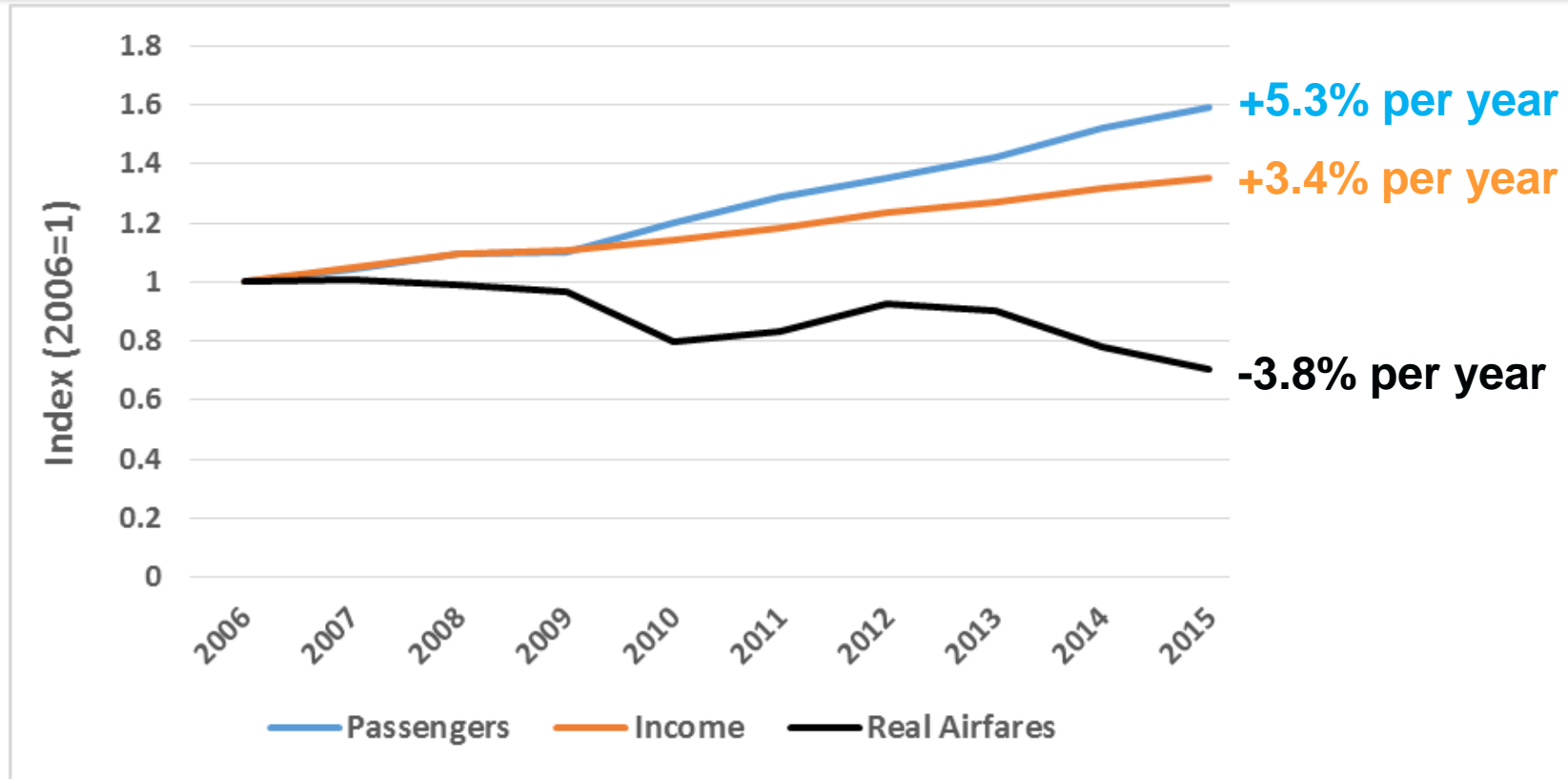
**December 2015**

# Topics

- Passenger numbers
- Growth drivers

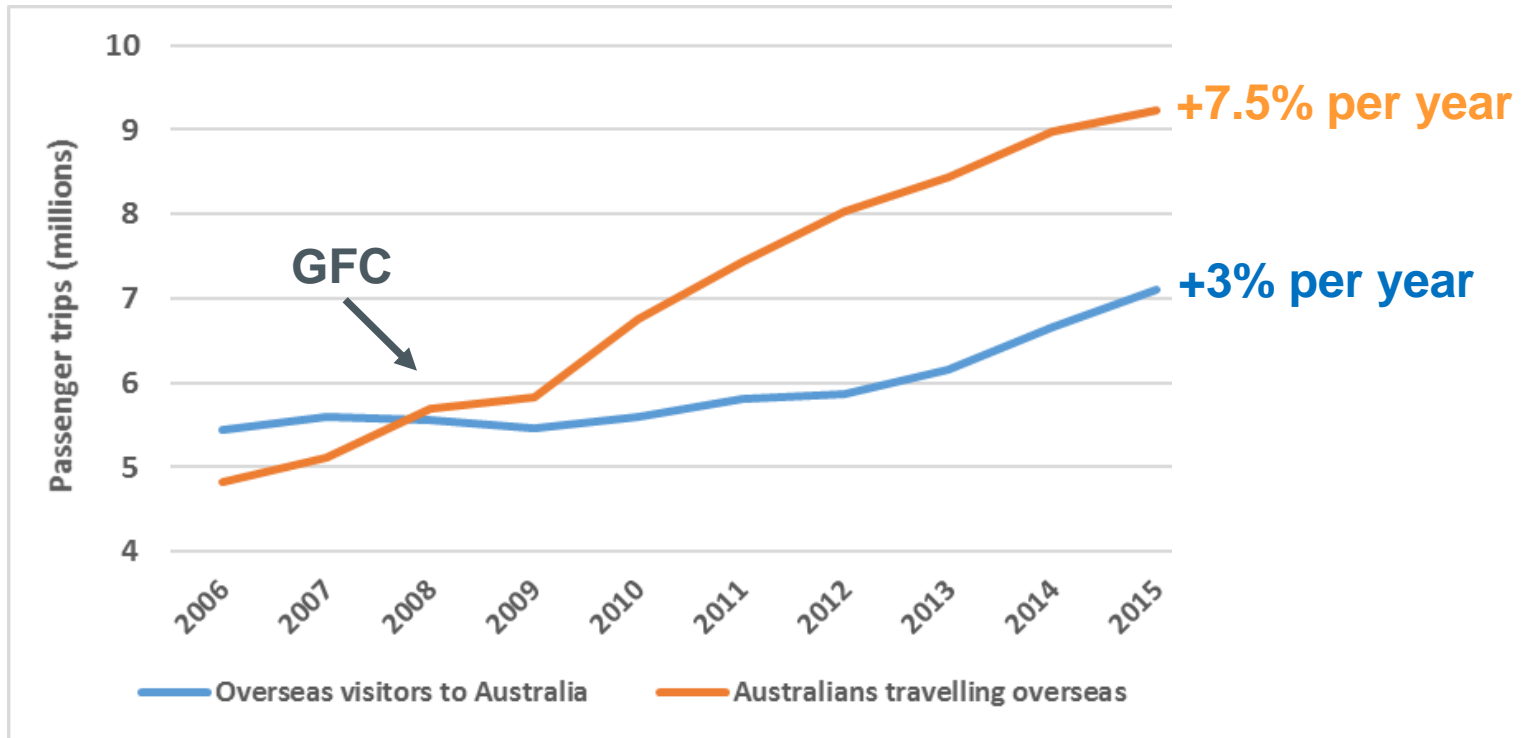


# Summary: Strong growth driven by $\uparrow$ income and $\downarrow$ real airfares



# Overseas visitors and Australians travelling overseas

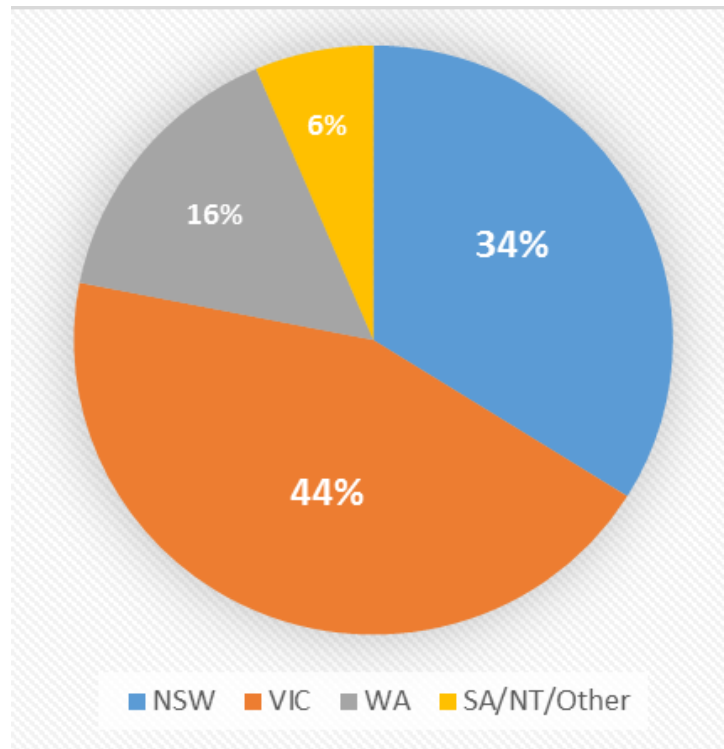
# Australians travelling overseas now dominates



Source: ABS

# Growth shares across Australia – Overseas visitors

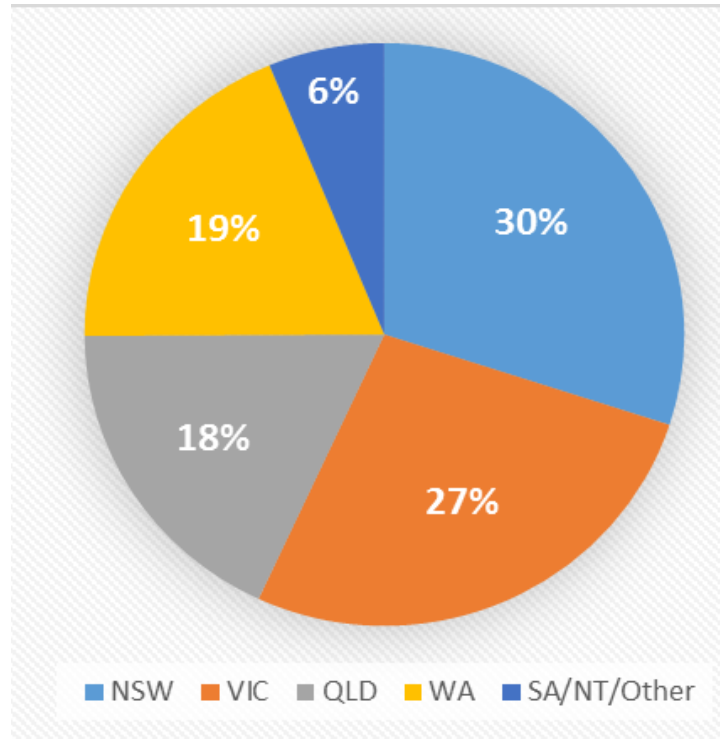
- 1.7 million additional trips
- VIC dominates overall growth
- QLD: -2%  
(↓50% tourists from Japan)



Source: ABS

# Growth shares across Australia – Australians travelling overseas

- 4.4 million additional trips
- More even distribution of growth across states



Source: ABS

# Growth drivers



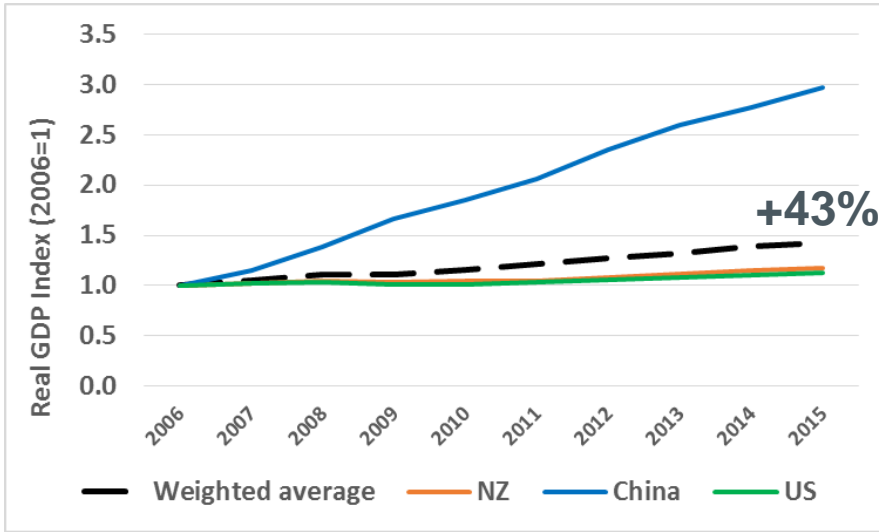
# Income and prices

## Commonly identified drivers of international aviation

- Income
  - Gross Domestic Product / Gross State Product
  - Disposable income / GDP per capita
- Prices
  - Airfares
  - Exchange rates
  - Country price levels

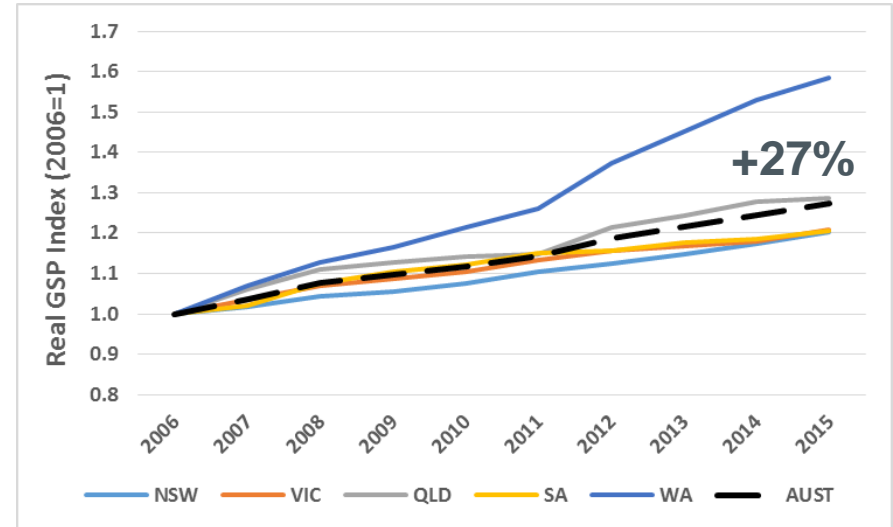
# Overseas GDP and Gross State Product

## Overseas GDP growth



Source: Trading Economics

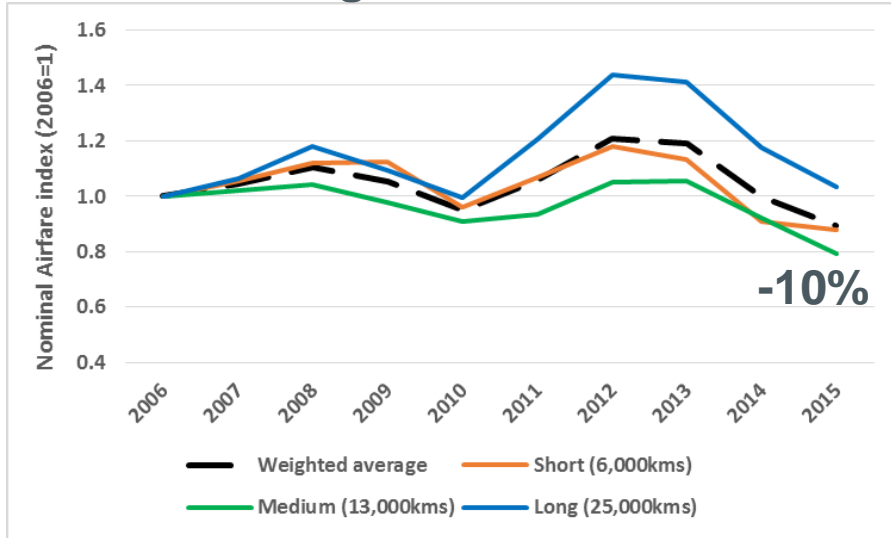
## GSP growth



Source: ABS

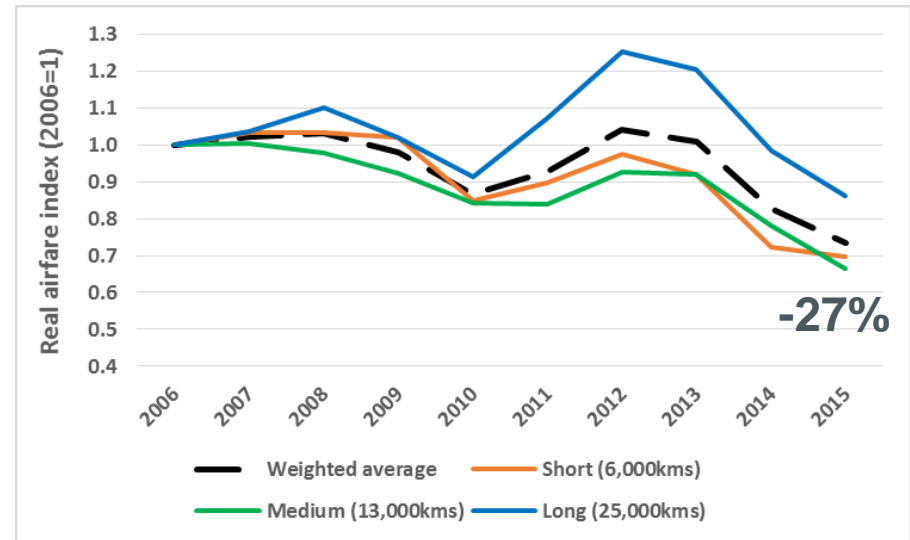
# Average airfares – overseas visitors to Australia

## Nominal average airfares



Sources: Derived from IATA PAXIS Database and ABS

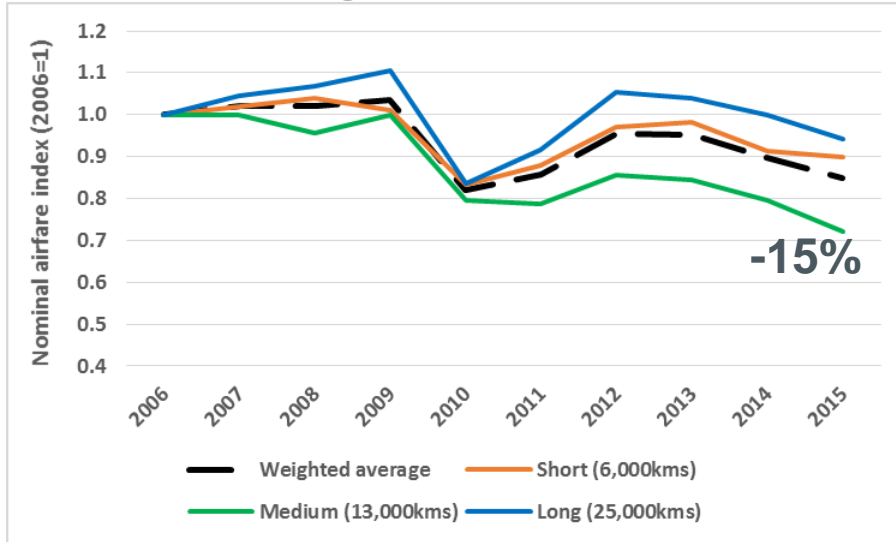
## Real average airfares



Sources: Derived from IATA PAXIS Database and ABS

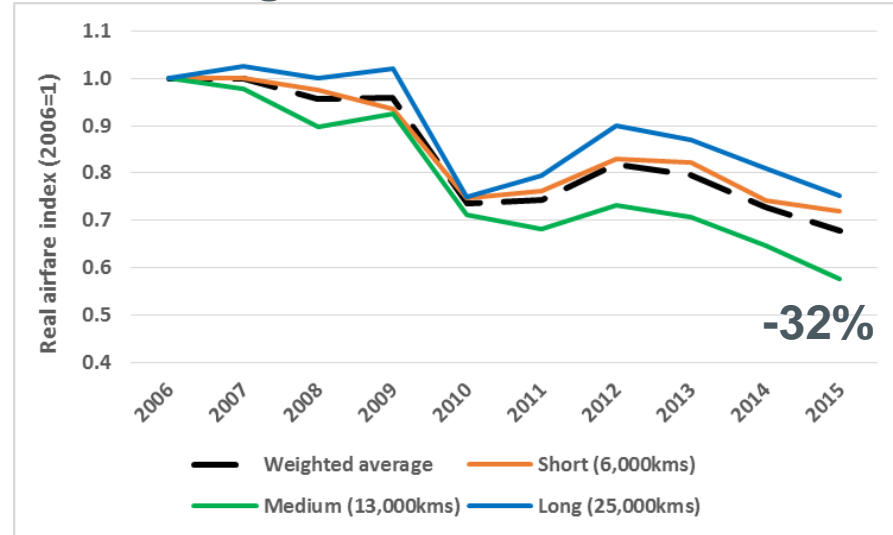
# Average airfares – Australians travelling overseas

## Nominal average airfares



Sources: Derived from IATA PAXIS Database and ABS

## Real average airfares



Sources: Derived from IATA PAXIS Database and ABS

## BARA's Members

AIRCALIN

AIR CANADA

AIR INDIA

AIR MAURITIUS

AIR NEW ZEALAND

AIR VANUATU

ALL NIPPON AIRWAYS

ASIANA AIRLINES

CATHAY PACIFIC AIRWAYS

CHINA EASTERN AIRLINES

CHINA SOUTHERN AIRLINES

DELTA AIR LINES

EITHAD AIRWAYS

EMIRATES

EVA AIR

FIJI AIRWAYS

GARUDA INDONESIA

JAPAN AIRLINES

KOREAN AIR

LATAM AIRLINES GROUP

MALAYSIA AIRLINES

PHILIPPINE AIRLINES

QANTAS AIRWAYS

QATAR AIRWAYS

ROYAL BRUNEI AIRLINES

SINGAPORE AIRLINES

SOUTH AFRICAN AIRWAYS

THAI AIRWAYS

TURKISH AIRLINES

UNITED AIRLINES

VIETNAM AIRLINES

VIRGIN AUSTRALIA



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