

January AFTA Travel Trends

November 2016 Results



Inbound Report

Introduction

These snapshots provide an overview of the performance of the Australian inbound tourism sector.

It uses information provided by the Australian Bureau of Statistics (ABS) Overseas Arrivals and Departures (OAD) data set.

Performance indicators are provided for each market and month.

A neutral rating is provided for markets which have a year on year variation of (+/-) 2%.



Total inbound tourists to Australia – November 2016

The ABS collects data on all travellers entering Australia through the Inbound Passenger Card. This section displays the number of international tourists travelling to Australia each month as of November Year end 2015 and 2016.

Key Highlights

2016 Year end growth of 11.0% up from 7.1% in 2015.

The last 6 months have delivered on average 11.7% growth in total tourists to Australia up from 8.3% in 2015.

| Month | Total number of travellers 2015 | 2015 Year end change | Total number of travellers 2016 | 2016 Year end change | 2016 Performance |
|--------------|---------------------------------|----------------------|---------------------------------|----------------------|------------------|
| December | 593,400 | 4.6% | 658,900 | 11.0% | Positive |
| January | 587,400 | 3.5% | 660,900 | 12.5% | Positive |
| February | 606,700 | 6.8% | 642,900 | 6.0% | Positive |
| March | 618,400 | 11.7% | 670,500 | 8.4% | Positive |
| April | 608,600 | 6.1% | 682,400 | 12.1% | Positive |
| May | 608,900 | 3.4% | 681,100 | 11.9% | Positive |
| June | 616,400 | 8.6% | 693,600 | 12.5% | Positive |
| July | 607,200 | 6.0% | 692,100 | 14.0% | Positive |
| August | 622,600 | 7.3% | 692,000 | 11.1% | Positive |
| September | 637,300 | 10.7% | 708,900 | 11.2% | Positive |
| October | 631,400 | 6.4% | 710,200 | 12.5% | Positive |
| November | 648,400 | 10.7% | 704,900 | 8.7% | Positive |
| Total | 7,386,700 | 7.1% | 8,198,400 | 11.0% | Positive |



Source: November 2016 Short-term Movement, Visitor Arrivals - Selected Countries of Residence: Seasonally adjusted

Year end changes to top Australian source markets – November 2016

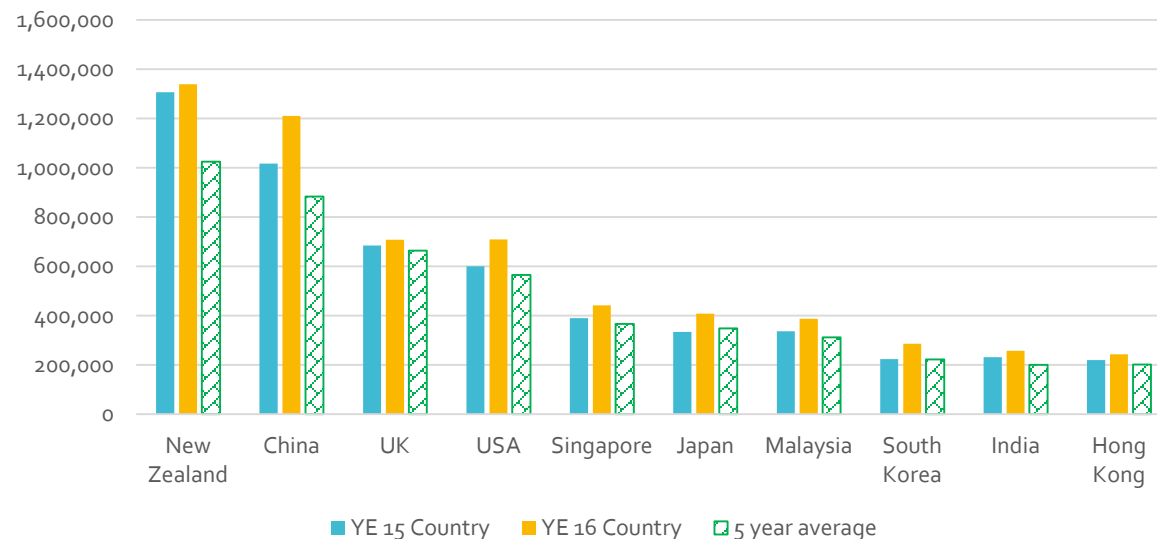
This section displays the performance of the top Australian source markets for international travellers as of November Year end 2015 and 2016.

Key Highlights

2016 Year end growth of top markets 14.3% up from 8.1% in 2015.

17.9% combined growth from Asian source markets up from 7.7% in 2015.

| Destination | Total number of travellers 2015 | 2015 Year end change | Total number of travellers 2016 | 2016 Year end change | 2016 Performance |
|-----------------------|---------------------------------|----------------------|---------------------------------|----------------------|------------------|
| New Zealand | 1,306,100 | 4.9% | 1,338,600 | 2.5% | Positive |
| China | 1,017,000 | 20.6% | 1,210,500 | 19.0% | Positive |
| UK | 683,900 | 2.8% | 708,100 | 3.5% | Positive |
| USA | 600,600 | 8.9% | 708,600 | 18.0% | Positive |
| Singapore | 390,100 | 3.4% | 441,900 | 13.3% | Positive |
| Japan | 333,900 | 1.8% | 407,600 | 22.1% | Positive |
| Malaysia | 337,100 | 2.5% | 387,000 | 14.8% | Positive |
| South Korea | 223,600 | 10.6% | 285,700 | 27.8% | Positive |
| India | 230,900 | 18.1% | 257,400 | 11.5% | Positive |
| Hong Kong | 219,500 | 6.9% | 242,600 | 10.5% | Positive |
| National Total | 7,386,700 | 7.1% | 8,198,400 | 11.0% | Positive |



Source: November 2016 Short-term Movement, Visitor Arrivals - Selected Countries of Residence: Seasonally adjusted

Monthly changes to top Australian source markets – November 2016

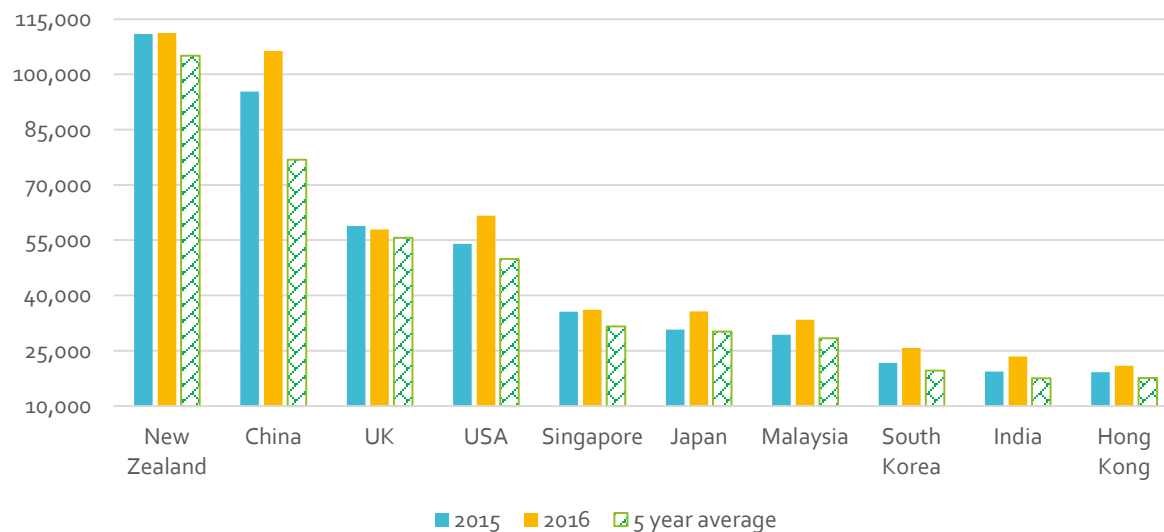
This section displays the performance of the top Australian source markets for international tourists comparing the month of November 2015 to November 2016.

Key Highlights

A stabilising of the inbound market with 3 of the top 5 markets rated as neutral.

Japan continues to rebound with growth over the years at an average of 15%.

| Destination | Total number of travellers 2015 | 2015 Year end change | Total number of travellers 2016 | 2016 Year end change | 2016 Performance |
|-----------------------|---------------------------------|----------------------|---------------------------------|----------------------|------------------|
| New Zealand | 111,000 | 4.6% | 111,200 | 0.2% | Neutral |
| China | 95,300 | 28.8% | 106,400 | 11.6% | Positive |
| UK | 58,900 | 9.5% | 57,900 | -1.7% | Neutral |
| USA | 54,000 | 11.1% | 61,600 | 14.1% | Positive |
| Singapore | 35,600 | 11.9% | 36,100 | 1.4% | Neutral |
| Japan | 30,700 | 13.7% | 35,700 | 16.3% | Positive |
| Malaysia | 29,300 | 8.5% | 33,400 | 14.0% | Positive |
| South Korea | 21,700 | 25.4% | 25,800 | 18.9% | Positive |
| India | 19,300 | 14.9% | 23,400 | 21.2% | Positive |
| Hong Kong | 19,200 | 10.3% | 20,900 | 8.9% | Positive |
| National Total | 648,400 | 10.7% | 704,900 | 8.7% | Positive |



Source: November 2016 Short-term Movement, Visitor Arrivals - Selected Countries of Residence: Seasonally adjusted

Outbound Report

Introduction

This snapshot provides an overview of the performance of the Australian outbound travel sector.

It uses information provided by the Australian Bureau of Statistics (ABS) Overseas Arrivals and Departures (OAD) data set. Performance indicators are provided for each market.

A neutral rating is provided for markets which have a year on year variation of (+/-) 2%.



Total outbound Australian travellers – November 2016

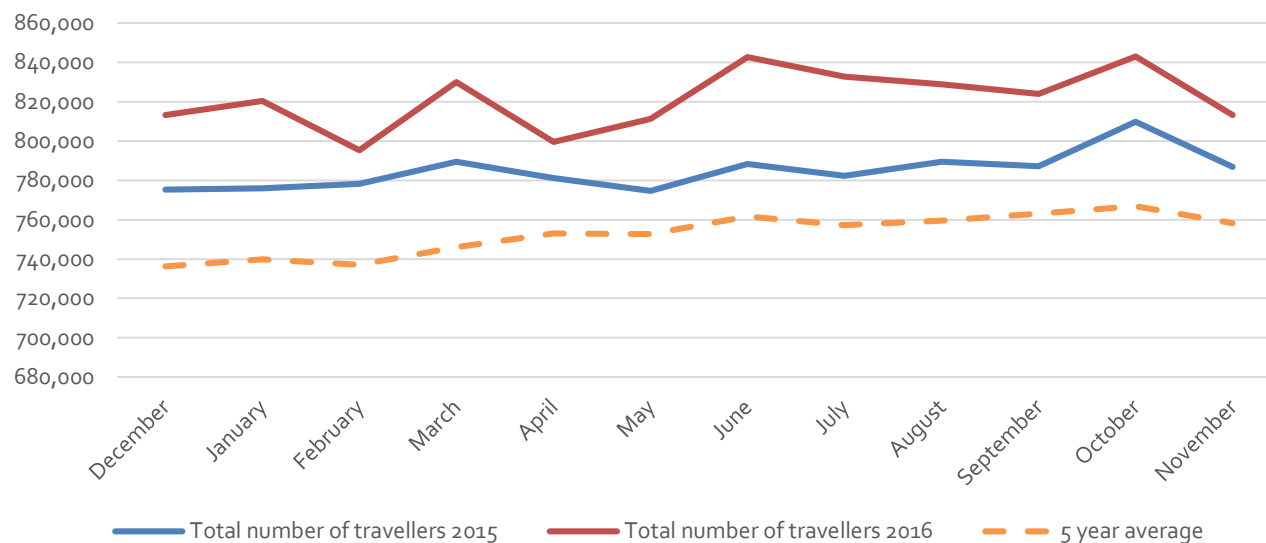
This section displays the number of Australians travelling outbound each month as of November Year end 2015 and 2016.

Key Highlights

All months have positive growth with March and April returning to real growth.

More Australians are heading overseas with 4.6% growth in departures.

| Month | Total number of travellers 2015 | 2015 Year end change | Total number of travellers 2016 | 2016 Year end change | 2016 Performance |
|--------------|---------------------------------|----------------------|---------------------------------|----------------------|------------------|
| December | 775,400 | 3.0% | 813,200 | 4.9% | Positive |
| January | 775,900 | 4.6% | 820,400 | 5.7% | Positive |
| February | 778,300 | 3.9% | 795,300 | 2.2% | Positive |
| March | 789,400 | 11.9% | 830,000 | 5.1% | Positive |
| April | 781,200 | -2.5% | 799,600 | 2.4% | Positive |
| May | 774,600 | 1.9% | 811,300 | 4.7% | Positive |
| June | 788,400 | 3.4% | 842,700 | 6.9% | Positive |
| July | 782,400 | 2.8% | 832,800 | 6.4% | Positive |
| August | 789,500 | 3.2% | 828,900 | 5.0% | Positive |
| September | 787,200 | 3.9% | 824,000 | 4.7% | Positive |
| October | 809,800 | 6.9% | 843,100 | 4.1% | Positive |
| November | 786,900 | 3.2% | 813,200 | 3.3% | Positive |
| Total | 9,419,000 | 3.8% | 9,854,500 | 4.6% | Positive |



Source: November 2016 Short-term Movement, Resident Departures - Selected Destinations: Seasonally adjusted

Year end changes to popular international destinations travelled to by Australian's – November 2016

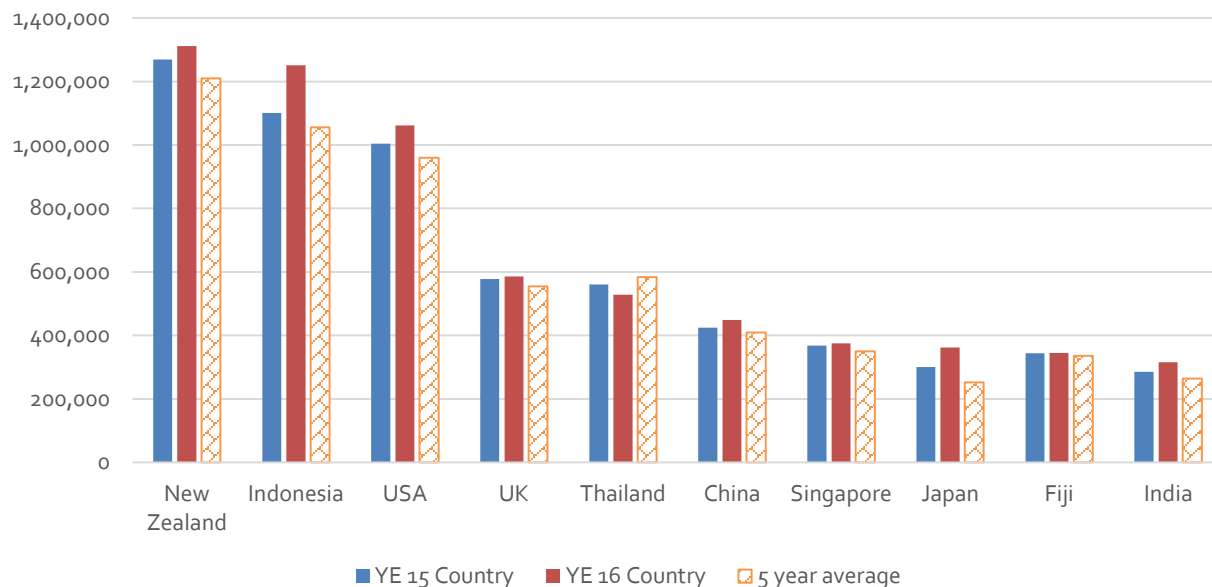
This section displays the performance of the top destinations Australian's are travelling to as of November Year end 2015 and 2016.

Key Highlights

Thailand continues to track below its 5 year average visitation rates.

Indonesia regains market share with record visitor numbers for November.

| Destination | Total number of travellers 2015 | 2015 Year end change | Total number of travellers 2016 | 2016 Year end change | 2016 Performance |
|-----------------------|---------------------------------|----------------------|---------------------------------|----------------------|------------------|
| New Zealand | 1,269,600 | 5.8% | 1,311,000 | 3.3% | Positive |
| Indonesia | 1,101,200 | 2.6% | 1,251,100 | 13.6% | Positive |
| USA | 1,004,400 | 6.6% | 1,061,900 | 5.7% | Positive |
| UK | 578,100 | 5.2% | 585,400 | 1.3% | Neutral |
| Thailand | 560,100 | -3.4% | 528,500 | -5.6% | Negative |
| China | 424,600 | 6.3% | 448,300 | 5.6% | Positive |
| Singapore | 367,700 | -3.3% | 375,100 | 2.0% | Neutral |
| Japan | 299,900 | 23.9% | 361,700 | 20.6% | Positive |
| Fiji | 344,000 | 4.8% | 345,200 | 0.3% | Neutral |
| India | 284,800 | 8.9% | 315,500 | 10.8% | Positive |
| National Total | 9,419,000 | 3.8% | 9,854,500 | 4.6% | Positive |



Source: November 2016 Short-term Movement, Resident Departures - Selected Destinations: Seasonally adjusted

Monthly changes to popular international destinations travelled to by Australian's– November 2016

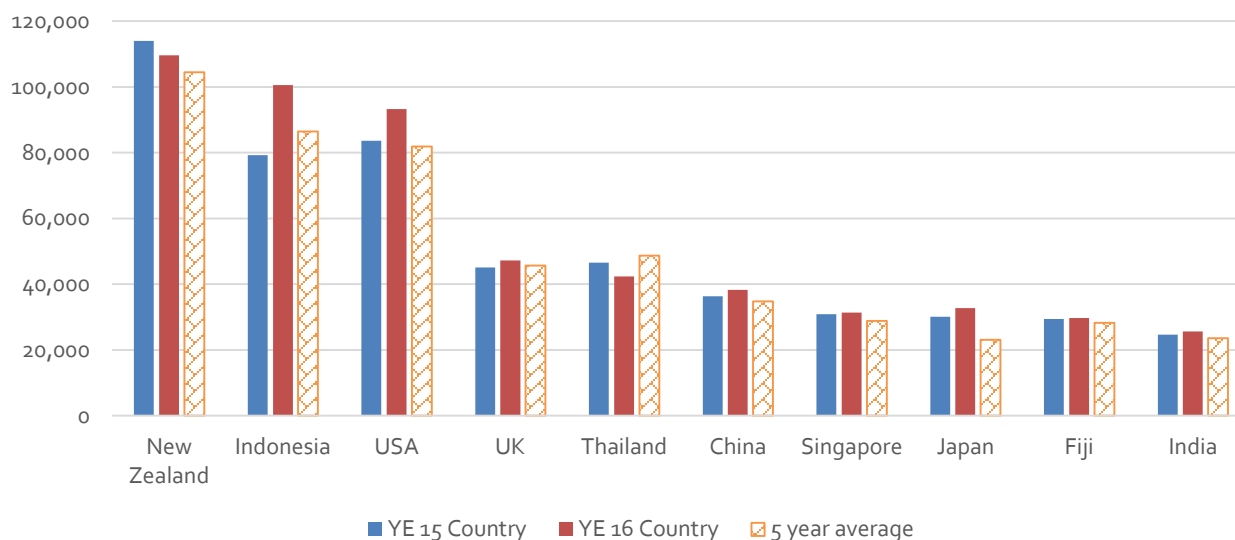
This section displays the performance of the top destinations Australian's are travelling to comparing November 2015 to November 2016.

Key Highlights

This is NZ first negative November Year End in over 10 years.

Indonesia and the USA grew at an average of 19.2%.

| Destination | Total number of travellers 2015 | 2015 Year end change | Total number of travellers 2016 | 2016 Year end change | 2016 Performance |
|-----------------------|---------------------------------|----------------------|---------------------------------|----------------------|------------------|
| New Zealand | 114,000 | 8.7% | 109,600 | -3.9% | Negative |
| Indonesia | 79,300 | -15.3% | 100,600 | 26.9% | Positive |
| USA | 83,600 | 3.5% | 93,300 | 11.6% | Positive |
| UK | 45,100 | -3.4% | 47,200 | 4.7% | Positive |
| Thailand | 46,600 | -5.5% | 42,400 | -9.0% | Negative |
| China | 36,300 | 6.8% | 38,300 | 5.5% | Positive |
| Singapore | 30,900 | -1.3% | 31,400 | 1.6% | Neutral |
| Japan | 30,100 | 44.0% | 32,700 | 8.6% | Positive |
| Fiji | 29,400 | 7.7% | 29,700 | 1.0% | Neutral |
| India | 24,700 | 5.1% | 25,600 | 3.6% | Positive |
| National Total | 786,900 | 3.2% | 813,200 | 3.3% | Positive |



Source: November 2016 Short-term Movement, Resident Departures - Selected Destinations: Seasonally adjusted

For further information please contact:

Dean Long

AFTA's National Manager – Strategy and Policy

E: Dean.Long@afta.com.au

Ph: 02 9287 9900

