

# AFTA Travel Trends

March 2017



# Inbound and Outbound overview

## Introduction

This snapshot provides an overview of the balance of trade between Inbound and Outbound Travel for Year end of January 2017.

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



## Total Visitor and Australian departure and arrivals – Year End January 2017

The ABS collects data on all travellers entering and leaving Australia through the Inbound and Outbound Passenger Card.

This section displays the number of international tourists entering and Australians departing Australia as of January Year end 2016 and 2017.

For travel and tourism to be sustainable it is imperative that the trade between each country is balanced and this snapshot tracks overall benefits to each country.

The countries chosen are the major Australian source markets and desired destinations.

	2016 Total Number of international visitors to Australia <i>Inbound</i>	2016 Total number of international trips by Australians <i>Outbound</i>	2017 Total Number of international visitors to Australia <i>Inbound</i>	2017 Total number of international trips by Australians <i>Outbound</i>
New Zealand	1,318,700	1,278,100	1,341,100	1,322,300
China	1,079,600	432,800	1,222,700	458,000
UK	691,600	589,900	712,000	590,900
USA	615,500	1,013,200	721,000	1,056,800
Singapore	398,700	365,400	441,500	383,600
Japan	341,700	310,900	417,100	361,600
Malaysia	340,900	253,100	388,400	257,500
South Korea	231,700	64,700	290,500	257,500
India	234,000	290,300	262,500	320,300
Hong Kong	224,800	215,300	248,800	216,100
Indonesia	149,700	1,116,600	169,100	1,240,600
Thailand	78,700	552,700	91,300	528,600
Fiji	31,800	351,700	36,500	345,200
<b>National Total</b>	<b>7,526,700</b>	<b>9,501,400</b>	<b>8,300,400</b>	<b>9,901,100</b>

Source: SOURCE: January 2017 Short-term Movement, Visitor Arrivals and Departures - Selected Countries of Residence: Seasonally adjusted



# 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 – January 2017

This section displays the number of international tourists travelling to Australia each month as of January Year end 2016 and 2017.

### Key Highlights

Average growth of 9.35% for the last two years.

There were over average 689,600 movements a month in Summer.

Month	Total number of travellers 2016	2016 Year end change	Total number of travellers 2017	2017 Year end change	2017 Performance
February	607,300	6.7%	644,300	6.1%	Positive
March	618,700	11.8%	671,400	8.5%	Positive
April	607,800	6.2%	680,800	12.0%	Positive
May	608,100	3.1%	680,800	12.0%	Positive
June	616,800	8.8%	693,800	12.5%	Positive
July	607,700	5.9%	691,300	13.8%	Positive
August	622,400	7.3%	691,800	11.2%	Positive
September	636,100	10.4%	710,200	11.6%	Positive
October	631,700	6.5%	708,100	12.1%	Positive
November	647,900	10.8%	703,400	8.6%	Positive
December	662,700	11.5%	707,800	6.8%	Positive
January	659,500	12.1%	716,700	8.7%	Positive
<b>Total</b>	<b>7,526,700</b>	<b>8.4%</b>	<b>8,300,400</b>	<b>10.3%</b>	<b>Positive</b>



## Year end changes to top Australian source markets – January 2017

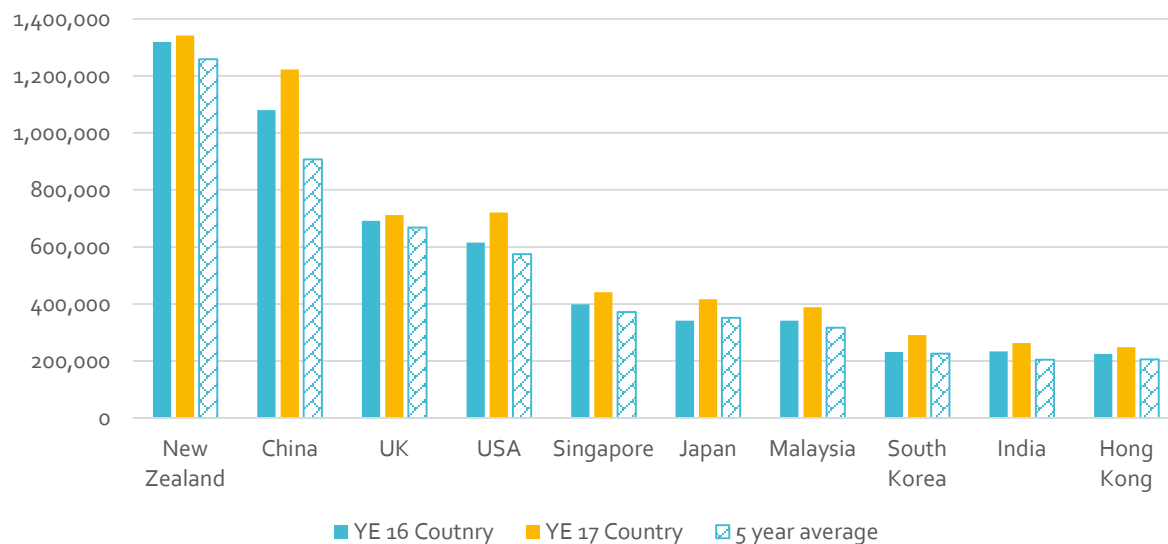
This section displays the performance of the top Australian source markets for international travellers as of January Year end 2016 and 2017.

### Key Highlights

**The USA is the 3<sup>rd</sup> highest source market in Australia with record growth.**

**South Korea has grown by 42% in the last two years.**

Destination	Total number of travellers 2016	2016 Year end change	Total number of travellers 2017	2017 Year end change	2017 Performance
New Zealand	1,318,700	5.7%	1,341,100	1.7%	Neutral
China	1,079,600	26.4%	1,222,700	13.3%	Positive
UK	691,600	4.8%	712,000	2.9%	Positive
USA	615,500	10.2%	721,000	17.1%	Positive
Singapore	398,700	6.6%	441,500	10.7%	Positive
Japan	341,700	3.7%	417,100	22.1%	Positive
Malaysia	340,900	3.6%	388,400	13.9%	Positive
South Korea	231,700	12.6%	290,500	25.4%	Positive
India	234,000	15.7%	262,500	12.2%	Positive
Hong Kong	224,800	9.6%	248,800	10.7%	Positive
<b>National Total</b>	<b>7,526,700</b>	<b>8.4%</b>	<b>8,300,400</b>	<b>10.3%</b>	<b>Positive</b>



Source: January 2017 Short-term Movement, Visitor Arrivals - Selected Countries of Residence: Seasonally adjusted

## Monthly changes to top Australian source markets – January 2017

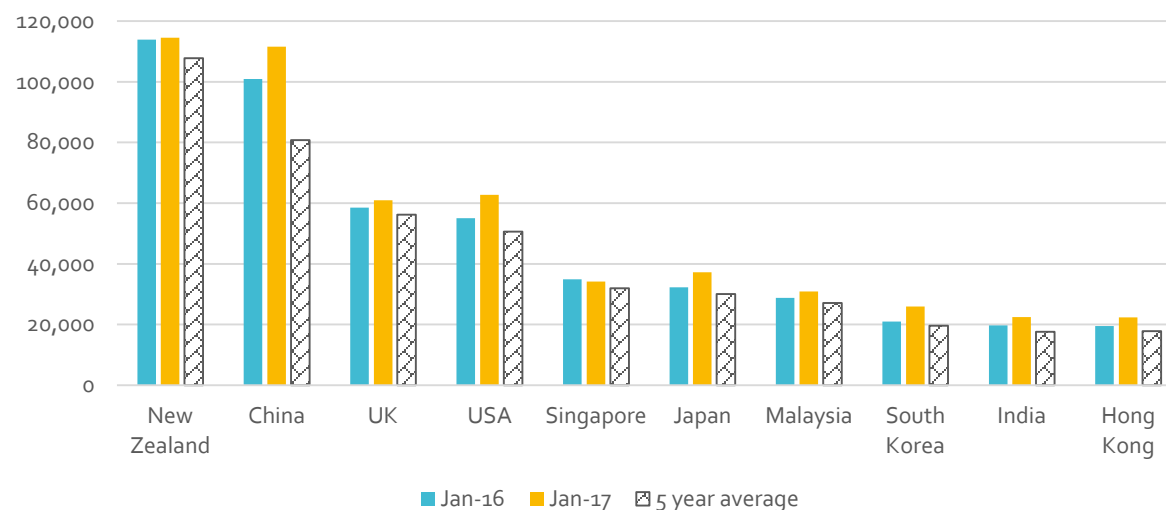
This section displays the performance of the top Australian source markets for international tourists comparing the month of January 2016 to January 2017.

### Key Highlights

The large increase in Asian source markets led Chinese visit tourists appears to be driven by Lunar New Year.

Top source markets grew at an average rate of 10.1% in 2017.

Destination	Total number of travellers 2016	2016 Year end change	Total number of travellers 2017	2017 Year end change	2017 Performance
New Zealand	113,900	8.0%	114,500	0.5%	Neutral
China	100,900	52.6%	111,500	10.5%	Positive
UK	58,500	2.3%	60,900	4.1%	Positive
USA	55,000	14.8%	62,700	14.0%	Positive
Singapore	34,900	11.9%	34,200	-2.0%	Negative
Japan	32,300	18.8%	37,200	15.2%	Positive
Malaysia	28,800	2.1%	30,900	7.3%	Positive
South Korea	21,000	16.7%	25,900	23.3%	Positive
India	19,700	3.7%	22,400	13.7%	Positive
Hong Kong	19,500	16.8%	22,300	14.4%	Positive
National Total	659,500	12.1%	716,700	8.7%	Positive





# 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 – January 2017

This section displays the number of Australians travelling outbound each month as of January Year end 2016 and 2017.

### Key Highlights

**December and January average growth down to 2.9% from 5.4%.**

**Yearly growth up 0.1% with all markets positive or neutral rating.**

Month	Total number of travellers 2016	2016 Year end change	Total number of travellers 2017	2017 Year end change	2017 Performance
February	778,300	3.9%	795,500	2.2%	Positive
March	789,600	12.0%	829,000	5.0%	Positive
April	780,000	-2.4%	798,300	2.3%	Positive
May	774,600	1.9%	811,200	4.7%	Positive
June	787,700	3.2%	842,400	6.9%	Positive
July	782,800	2.9%	832,900	6.4%	Positive
August	789,800	3.2%	828,700	4.9%	Positive
September	785,900	3.8%	824,700	4.9%	Positive
October	810,900	6.9%	844,600	4.2%	Positive
November	788,600	3.4%	812,500	3.0%	Positive
December	813,000	5.0%	829,400	2.0%	Neutral
January	820,200	5.8%	851,900	3.9%	Positive
<b>Total</b>	<b>9,501,400</b>	<b>4.1%</b>	<b>9,901,100</b>	<b>4.2%</b>	<b>Positive</b>



Source: January 2017 Short-term Movement, Visitor Arrivals - Selected Countries of Residence: Seasonally adjusted

## Year end changes to popular international destinations travelled to by Australian's – January 2017

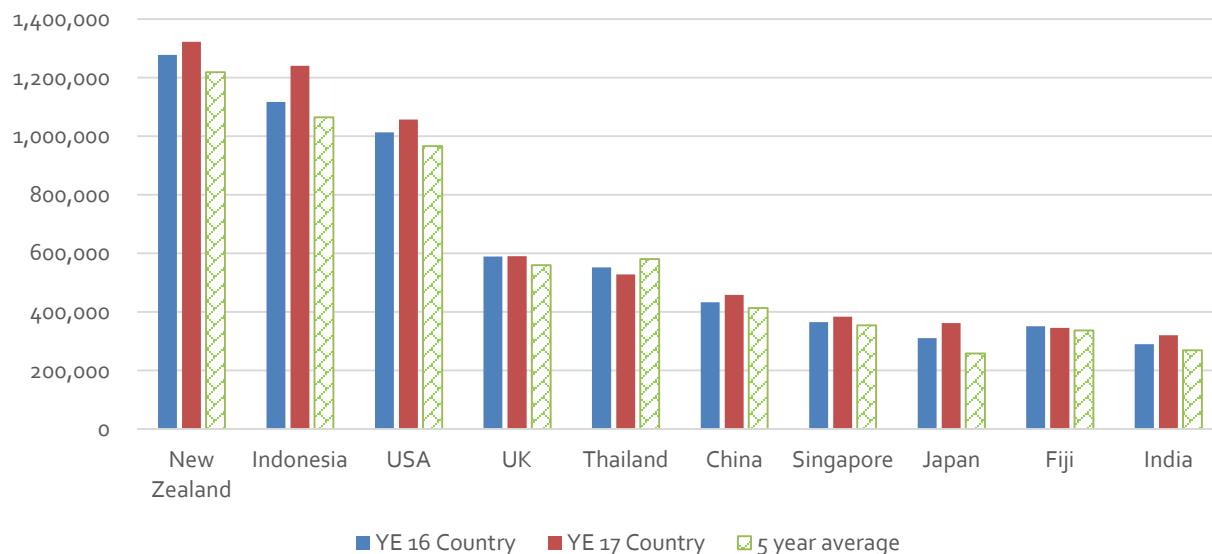
This section displays the performance of the top destinations Australian's are travelling to as of January Year end 2016 and 2017.

### Key Highlights

**Thailand is down 15.5% on 2013 departure numbers.**

**Japan recover continues, up 109.9% on 2013 departure numbers.**

Destination	Total number of travellers 2016	2016 Year end change	Total number of travellers 2017	2017 Year end change	2017 Performance
New Zealand	1,278,100	5.8%	1,322,300	3.5%	Positive
Indonesia	1,116,600	2.3%	1,240,600	11.1%	Positive
USA	1,013,200	5.8%	1,056,800	4.3%	Positive
UK	589,900	7.6%	590,900	0.2%	Neutral
Thailand	552,700	-2.9%	528,600	-4.4%	Negative
China	432,800	9.7%	458,000	5.8%	Positive
Singapore	365,400	-2.9%	383,600	5.0%	Positive
Japan	310,900	24.0%	361,600	16.3%	Positive
Fiji	351,700	6.0%	345,200	-1.8%	Neutral
India	290,300	8.3%	320,300	10.3%	Positive
<b>National Total</b>	<b>9,501,400</b>	<b>4.1%</b>	<b>9,901,100</b>	<b>4.2%</b>	<b>Positive</b>



Source: January 2017 Short-term Movement, Visitor Arrivals - Selected Countries of Residence: Seasonally adjusted

## Monthly changes to popular international destinations travelled to by Australian's– January 2017

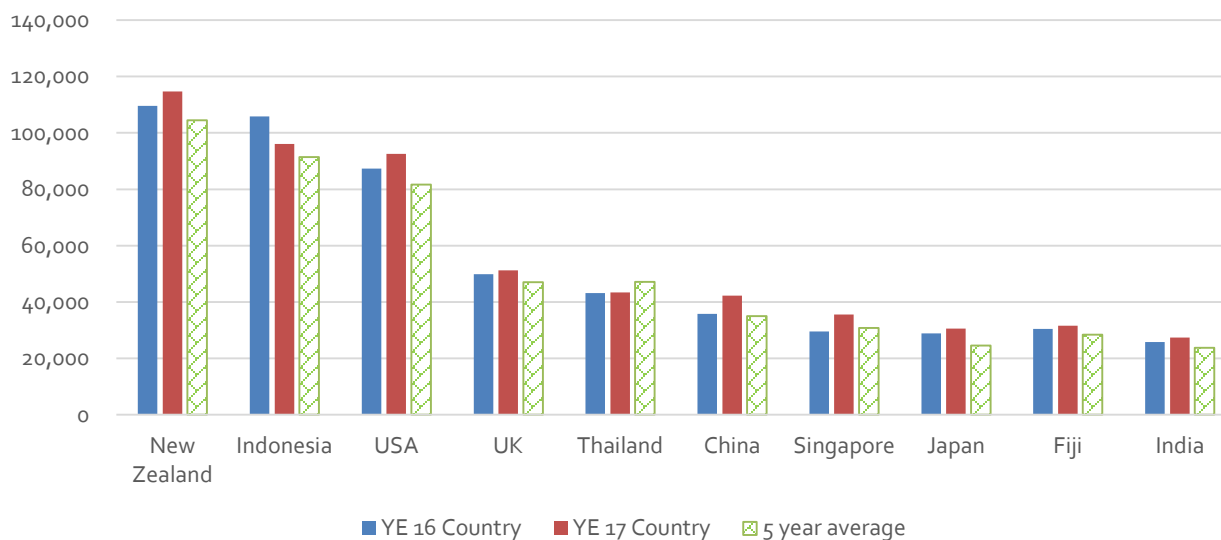
This section displays the performance of the top destinations Australian's are travelling to comparing January 2016 to January 2017

### Key Highlights

**Thailand appears to have stabilised but still below the 5 year average.**

**USA recovers from a negative December (down 10.1%) to grow 6% in January.**

Destination	Total number of travellers 2016	2016 Year end change	Total number of travellers 2017	2017 Year end change	2017 Performance
New Zealand	109,600	4.8%	114,700	4.7%	Positive
Indonesia	105,800	11.1%	96,100	-9.2%	Negative
USA	87,300	3.7%	92,500	6.0%	Positive
UK	49,900	10.4%	51,200	2.6%	Positive
Thailand	43,200	-5.9%	43,400	0.5%	Neutral
China	35,800	18.2%	42,200	17.9%	Positive
Singapore	29,500	-1.3%	35,500	20.3%	Positive
Japan	28,800	13.8%	30,600	6.3%	Positive
Fiji	30,400	12.6%	31,600	3.9%	Positive
India	25,800	4.9%	27,400	6.2%	Positive
<b>National Total</b>	<b>820,200</b>	<b>5.8%</b>	<b>851,900</b>	<b>3.9%</b>	<b>Positive</b>



Source: January 2017 Short-term Movement, Visitor Arrivals - Selected Countries of Residence: Seasonally adjusted

# Airlines

## Introduction

This snapshot provides the market share of each airline for international travel.

Information is sourced directly from the Department of Infrastructure and Regional Development.



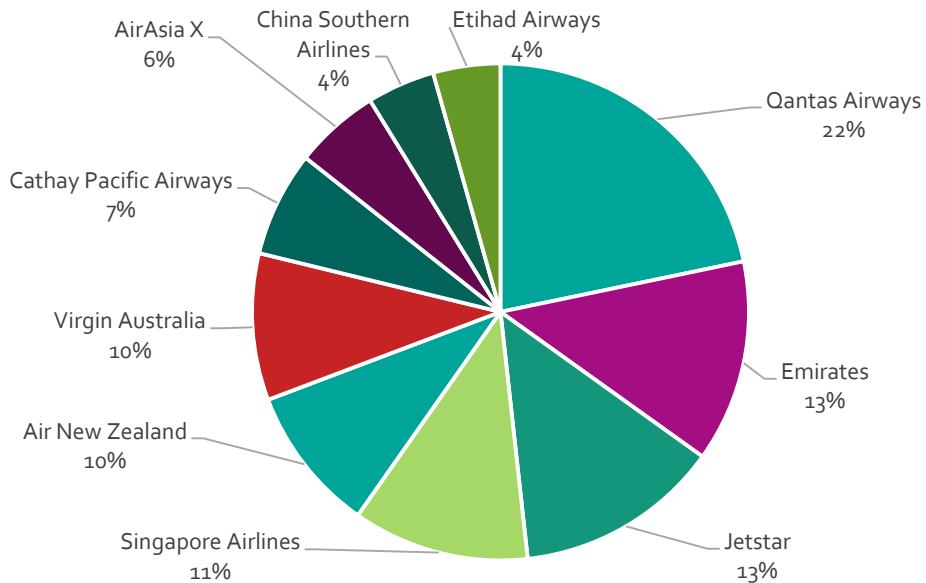


## Airline activity - Month End December 2016

This snapshot displays the market share of each airline for international travel for the month of December 2016.

This information from the Department of Infrastructure and Regional Development presents statistical information on the scheduled operations of international airlines operating into/out of Australia.

Monthly Share of passengers carried	Dec-15	Dec-16
<b>Qantas Airways</b>	15.4%	15.1%
<b>Emirates</b>	9.4%	9.1%
<b>Jetstar</b>	9.5%	8.9%
<b>Singapore Airlines</b>	8.2%	7.9%
<b>Air New Zealand</b>	6.8%	6.4%
<b>Virgin Australia</b>	6.8%	5.8%
<b>Cathay Pacific Airways</b>	4.9%	4.5%
<b>AirAsia X</b>	3.9%	4.2%
<b>China Southern Airlines</b>	3.1%	3.2%
<b>Etihad Airways</b>	3.1%	3.2%



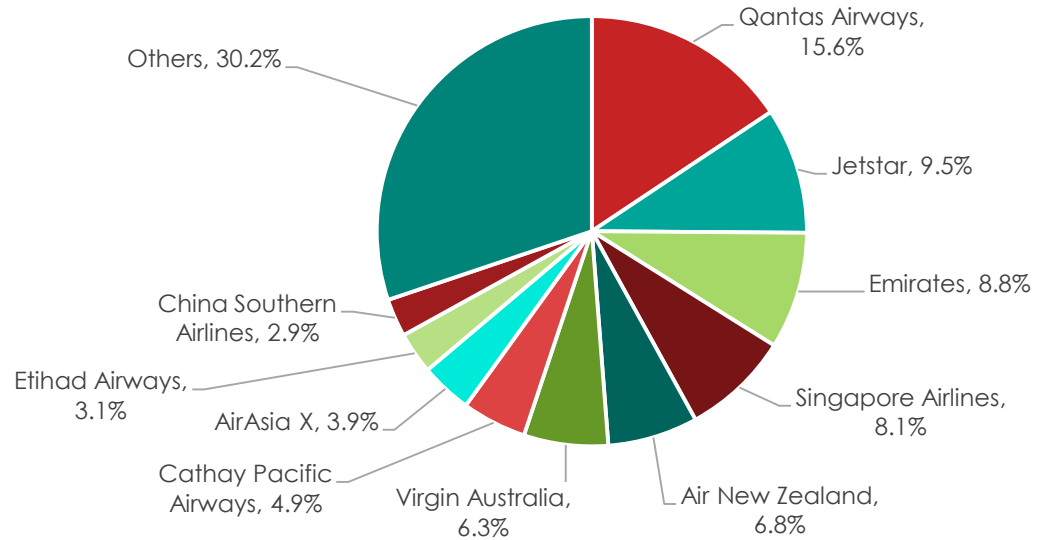
Source: International Airline Activity—Monthly Publications, December 2015 and December 2016

## Airline activity – Year End December 2016

This snapshot displays the market share of each airline for international travel of Year end - December 2016.

This information from the Department of Infrastructure and Regional Development presents statistical information on the scheduled operations of international airlines operating into/out of Australia.

Year End share of passengers carried	Dec-15	Dec-16
Qantas Airways	15.9%	15.6%
Jetstar	9.6%	9.5%
Emirates	9.2%	8.8%
Singapore Airlines	8.6%	8.1%
Air New Zealand	7.4%	6.8%
Virgin Australia	7.3%	6.3%
Cathay Pacific Airways	5.2%	4.9%
AirAsia X	3.6%	3.9%
Etihad Airways	3.1%	3.1%
China Southern Airlines	2.9%	2.9%
Others	27.2%	30.2%



Source: International Airline Activity—Monthly Publications, December 2015 and December 2016

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