

AFTA Travel Trends

September 2017



Changes from September 2017

Dear Reader,

Welcome to the September AFTA Travel Trends.

As some of you may know, from 1 July 2017, travellers leaving Australia were no longer required to complete an Outgoing Passenger Card (OPC).

Due to the removal of the OPC the Australian Bureau of Statistics (ABS) has undertaken a review of its Overseas Arrivals and Departures statistics, methodology and processing systems. This is the data set that has underpinned this publication since its first publication in January 2017.

As part of this review the ABS has considered alternative data sources and ways to make better use of a range of existing data collected by Department of Immigration and Border Protection about Australia's international border crossings.

Lastly, AFTA advises that care should be taken when comparing previous publications of AFTA's Travel Trends report to this and future publications as the outbound data set is now significantly different due to the fore mentioned changes.

We hope you find the September AFTA Travel Trends useful and if you have any questions please contact us.

Regards, Dean Long

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Inbound and Outbound overview

Introduction

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

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

This section displays the number of international tourists entering and Australians departing Australia as of July 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.

	July YE 2016 Total Number of international visitors to Australia <i>Inbound</i>	July YE 2016 Total number of international trips by Australians <i>Outbound</i>	July YE 2017 Total Number of international visitors to Australia <i>Inbound</i>	July YE 2017 Total number of international trips by Australians <i>Outbound</i>
New Zealand	1,324,000	1,299,700	1,352,900	1,413,600
China	1,180,000	449,500	1,307,200	513,100
UK	700,700	590,700	723,200	620,200
USA	673,400	1,060,900	770,500	1,087,400
Singapore	421,500	375,500	437,700	402,400
Japan	389,400	340,200	430,800	381,900
Malaysia	365,200	250,500	400,800	268,500
South Korea	260,600	66,400	288,900	74,300
India	244,700	300,400	284,400	345,800
Hong Kong	235,400	218,500	264,000	217,900
Indonesia	159,500	1,168,900	186,100	1,217,400
Thailand	86,400	553,900	94,800	563,300
Fiji	34,400	349,500	39,200	350,400
National Total	7,928,800	9,698,200	8,626,500	10,364,600

Source: July 2017 Short-term Movement, Residents Returning and Visitors Arriving - 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 – July 2017

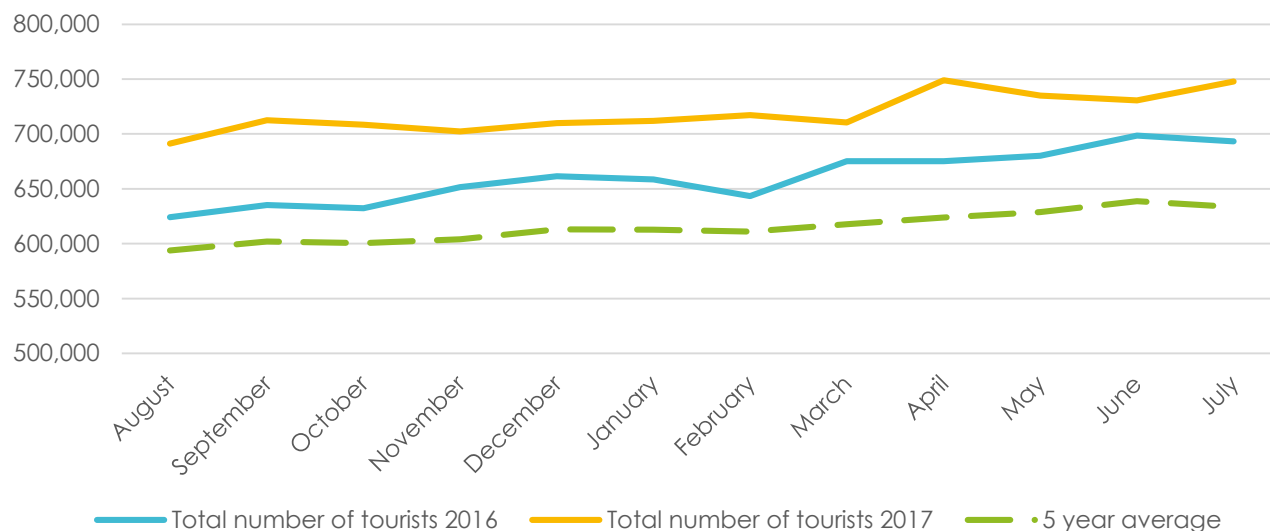
This section displays the number of international tourists travelling to Australia each month as of July Year end 2016 and 2017.

Key Highlights

July experiences an average 10.5% increase over the last two years.

Movements in July have nearly doubled since 2003.

Month	Total number of travellers 2016	2016 Year end change	Total number of travellers 2017	2017 Year end change	2017 Performance
August	624,000	7.2%	691,200	10.8%	Positive
September	635,100	9.0%	712,600	12.2%	Positive
October	632,200	7.0%	708,400	12.1%	Positive
November	651,500	11.2%	702,200	7.8%	Positive
December	661,400	11.4%	709,800	7.3%	Positive
January	658,700	11.9%	712,100	8.1%	Positive
February	643,500	6.5%	717,300	11.5%	Positive
March	675,100	9.1%	710,600	5.3%	Positive
April	675,200	11.7%	749,000	10.9%	Positive
May	680,200	11.9%	734,900	8.0%	Positive
June	698,500	12.9%	730,600	4.6%	Positive
July	693,400	13.2%	747,800	7.8%	Positive
Total	7,928,800	10.3%	8,626,500	8.8%	Positive



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

Year end changes to top Australian source markets – July 2017

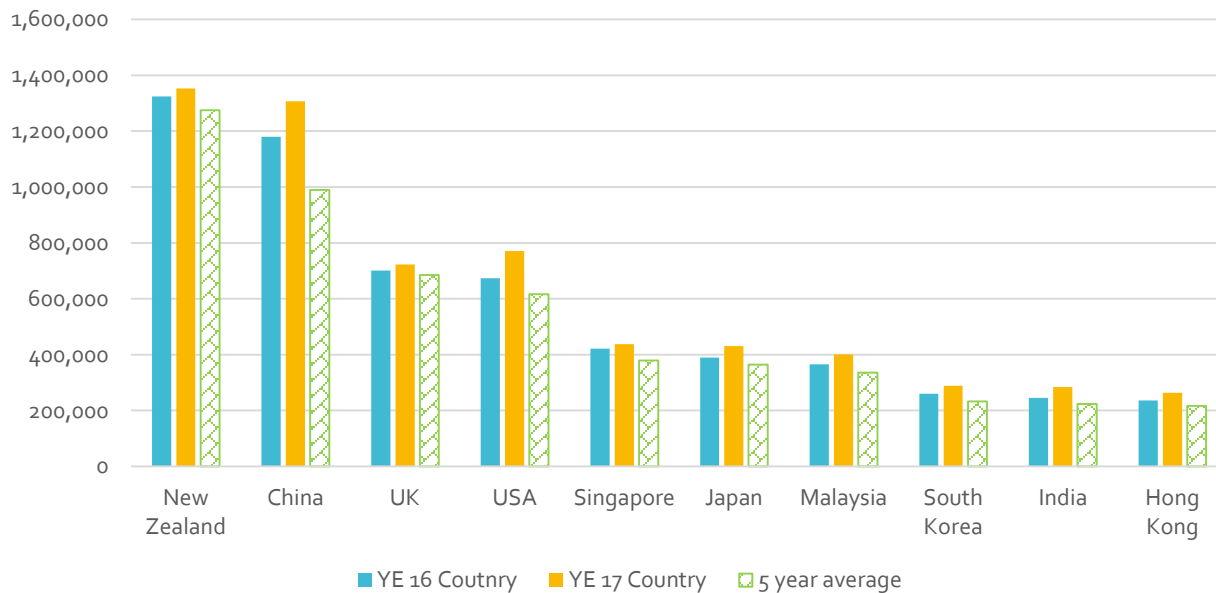
This section displays the performance of the top Australian source markets for international travellers as of July Year end 2016 and 2017.

Key Highlights

Major source markets have grown on an average of 9.4% for the year.

China is up more than 34% in 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	1,324,000	3.3%	1,352,900	2.2%	Positive
China	1,180,000	24.0%	1,307,200	10.8%	Positive
UK	700,700	4.2%	723,200	3.2%	Positive
USA	673,400	14.4%	770,500	14.4%	Positive
Singapore	421,500	15.0%	437,700	3.8%	Positive
Japan	389,400	17.3%	430,800	10.6%	Positive
Malaysia	365,200	9.8%	400,800	9.7%	Positive
South Korea	260,600	22.6%	288,900	10.9%	Positive
India	244,700	8.6%	284,400	16.2%	Positive
Hong Kong	235,400	13.1%	264,000	12.1%	Positive
National Total	7,928,800	10.3%	8,626,500	8.8%	Positive



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

Monthly changes to top Australian source markets – July 2017

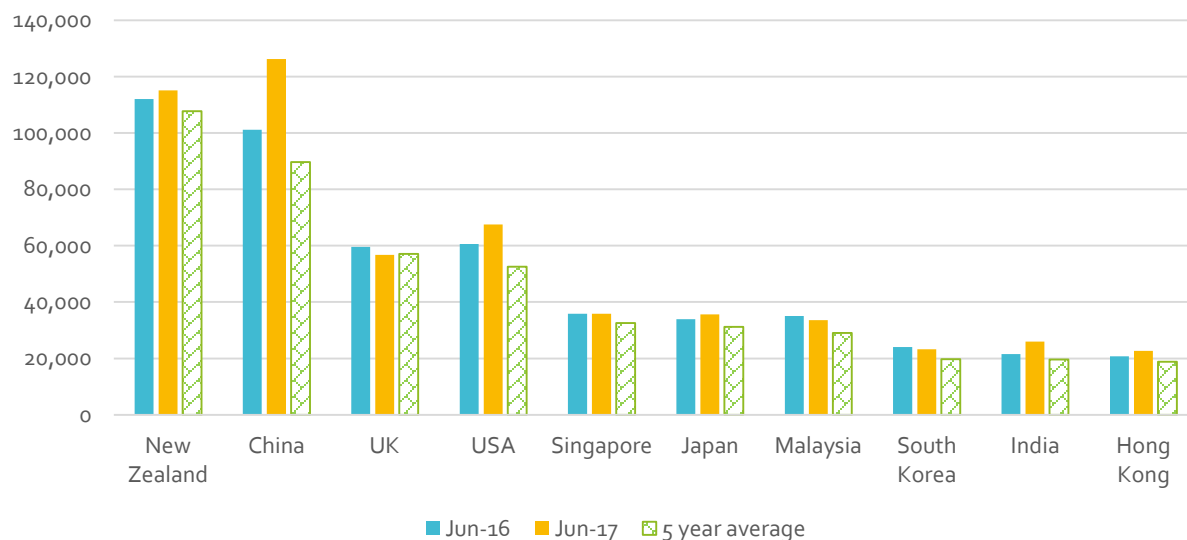
This section displays the performance of the top Australian source markets for international tourists comparing the month of July 2016 to July 2017.

Key Highlights

China, India and USA lead the growth with an average of 19% increase for each market.

The UK is the only market to fall below their 5 year average.

Destination	Total number of travellers 2016	2016 Year end change	Total number of travellers 2017	2017 Year end change	2017 Performance
New Zealand	112,100	2.4%	115,100	2.7%	Positive
China	101,200	21.2%	126,300	24.8%	Positive
UK	59,600	2.2%	56,700	-4.9%	Negative
USA	60,600	23.9%	67,500	11.4%	Positive
Singapore	35,900	10.1%	35,900	0.0%	Neutral
Japan	33,900	18.5%	35,600	5.0%	Positive
Malaysia	35,100	32.0%	33,600	-4.3%	Negative
South Korea	24,000	37.1%	23,200	-3.3%	Negative
India	21,500	10.3%	26,000	20.9%	Positive
Hong Kong	20,700	7.3%	22,700	9.7%	Positive
National Total	693,400	13.2%	747,800	7.8%	Positive



Source: July 2017 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 – July 2017

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

Key Highlights

More than 10 million Australian departures for YE July 2017.

Growth in July is still strong but down 3.8% from a record high of 8.5% from 2016

Month	Total number of travellers 2016	2016 Year end change	Total number of travellers 2017	2017 Year end change	2017 Performance
August	798,400	4.5%	836,000	4.7%	Positive
September	792,600	3.3%	845,900	6.7%	Positive
October	788,500	3.7%	837,000	6.2%	Positive
November	803,600	4.4%	838,400	4.3%	Positive
December	809,700	6.7%	873,600	7.9%	Positive
January	807,100	3.6%	849,100	5.2%	Positive
February	795,100	6.1%	887,800	11.7%	Positive
March	806,400	3.4%	857,800	6.4%	Positive
April	819,300	5.1%	894,700	9.2%	Positive
May	815,500	4.9%	895,300	9.8%	Positive
June	826,000	4.8%	875,500	6.0%	Positive
July	836,000	8.3%	873,500	4.5%	Positive
Total	9,698,200	4.9%	10,364,600	6.9%	Positive



Source: July 2017 Short-term Movement, Residents Returning - Selected Destinations: Seasonally adjusted

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

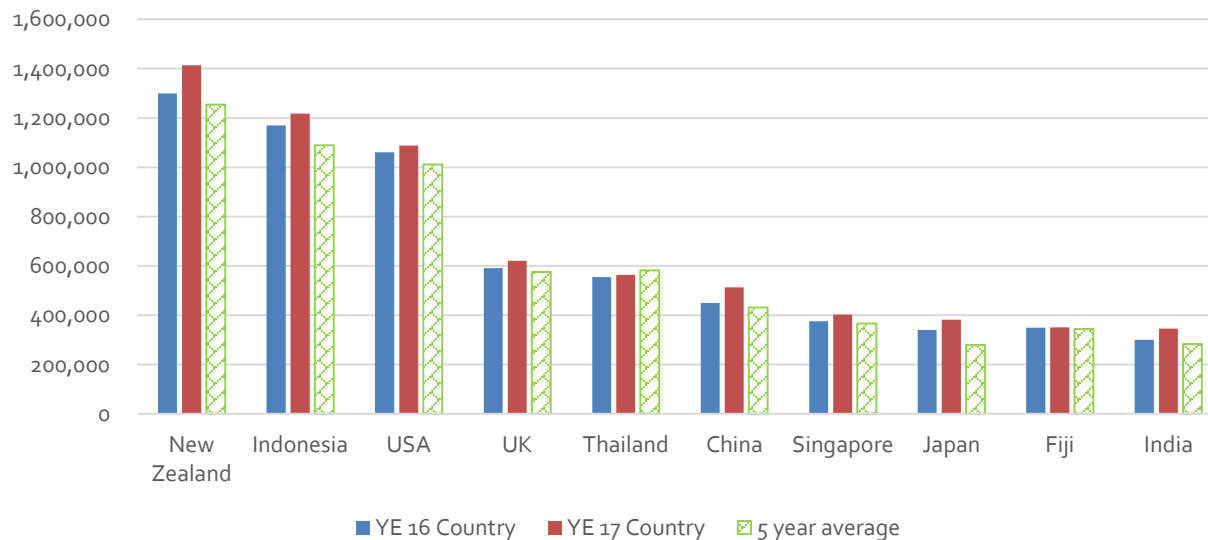
This section displays the performance of the top destinations Australian's are travelling to as of July Year end 2016 and 2017.

Key Highlights

NZ performs strongly, growing an average of 7.2% over the last two years.

India has experienced a record growth of 15.1% up 7.4% on 2016.

Destination	Total number of travellers 2016	2016 Year end change	Total number of travellers 2017	2017 Year end change	2017 Performance
New Zealand	1,299,700	5.6%	1,413,600	8.8%	Positive
Indonesia	1,168,900	4.6%	1,217,400	4.1%	Positive
USA	1,060,900	5.4%	1,087,400	2.5%	Positive
UK	590,700	4.2%	620,200	5.0%	Positive
Thailand	553,900	-2.2%	563,300	1.7%	Neutral
China	449,500	9.7%	513,100	14.1%	Positive
Singapore	375,500	2.3%	402,400	7.2%	Positive
Japan	340,200	25.6%	381,900	12.3%	Positive
Fiji	349,500	1.3%	350,400	0.3%	Neutral
India	300,400	7.7%	345,800	15.1%	Positive
National Total	9,698,200	4.9%	10,364,600	6.9%	Positive



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

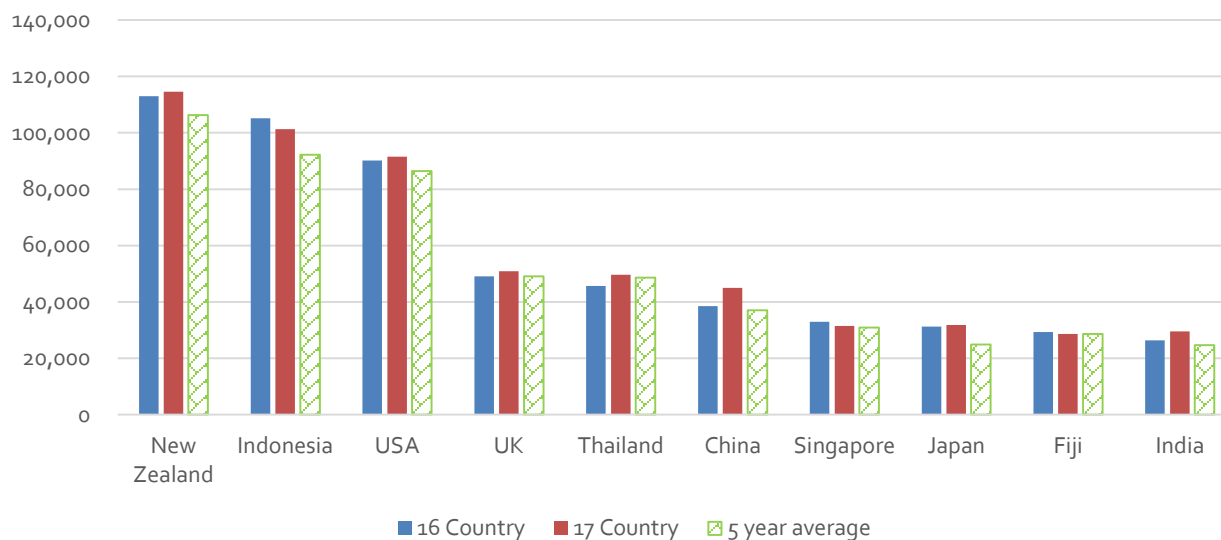
This section displays the performance of the top destinations Australian's are travelling to comparing February 2016 to July 2017

Key Highlights

Thailand experiences growth in 2017, bringing it back in to line with the 5 year average.

Fiji is down 5.7% over the last years, but still above the 5 year average.

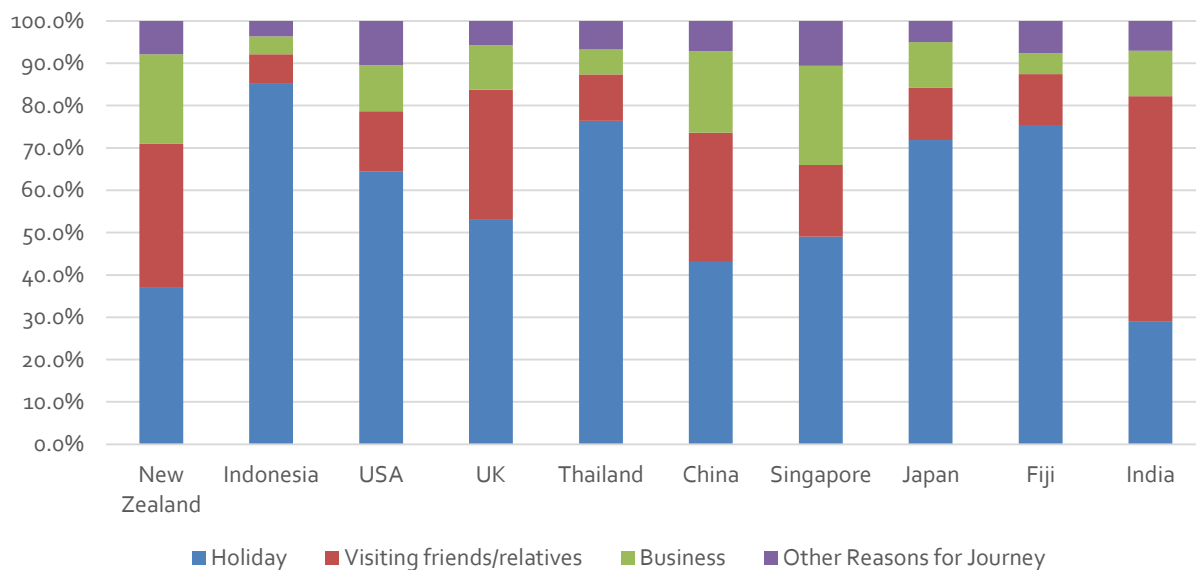
Destination	Total number of travellers 2016	2016 Year end change	Total number of travellers 2017	2017 Year end change	2017 Performance
New Zealand	113,000	7.8%	114,600	1.4%	Neutral
Indonesia	105,200	24.9%	101,300	-3.7%	Negative
USA	90,200	4.4%	91,500	1.4%	Neutral
UK	49,100	-2.8%	50,900	3.7%	Positive
Thailand	45,600	-4.6%	49,600	8.8%	Positive
China	38,500	7.2%	45,000	16.9%	Positive
Singapore	32,900	10.4%	31,500	-4.3%	Negative
Japan	31,200	30.5%	31,800	1.9%	Neutral
Fiji	29,300	-3.3%	28,600	-2.4%	Negative
India	26,400	8.6%	29,500	11.7%	Positive
National Total	836,000	8.3%	873,500	4.5%	Positive



Reasons to travel to popular international destinations by Australian's – July 2017

This section displays the performance of the popular destinations visited by Australian's by reason of travel in July 2017.

	Holiday	Visiting friends/relatives	Business	Other Reasons for Journey
New Zealand	37.0%	34.0%	21.1%	7.9%
Indonesia	85.3%	6.8%	4.3%	3.6%
USA	64.4%	14.3%	10.9%	10.4%
UK	53.2%	30.6%	10.5%	5.8%
Thailand	76.4%	10.9%	5.9%	6.7%
China	43.0%	30.6%	19.3%	7.1%
Singapore	49.1%	17.0%	23.4%	10.6%
Japan	71.9%	12.3%	10.8%	5.0%
Fiji	75.4%	12.0%	4.9%	7.7%
India	29.1%	53.2%	10.7%	7.1%
National Total	59.6%	21.7%	11.1%	7.6%



Source: July 2017 Short-term Movement, Residents Returning - Selected Destinations: 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.

Department Summary:

Fifty-eight international airlines operated scheduled services to/from Australia during June 2017 (includes five dedicated freight airlines but excludes airlines operating only via code share arrangements).



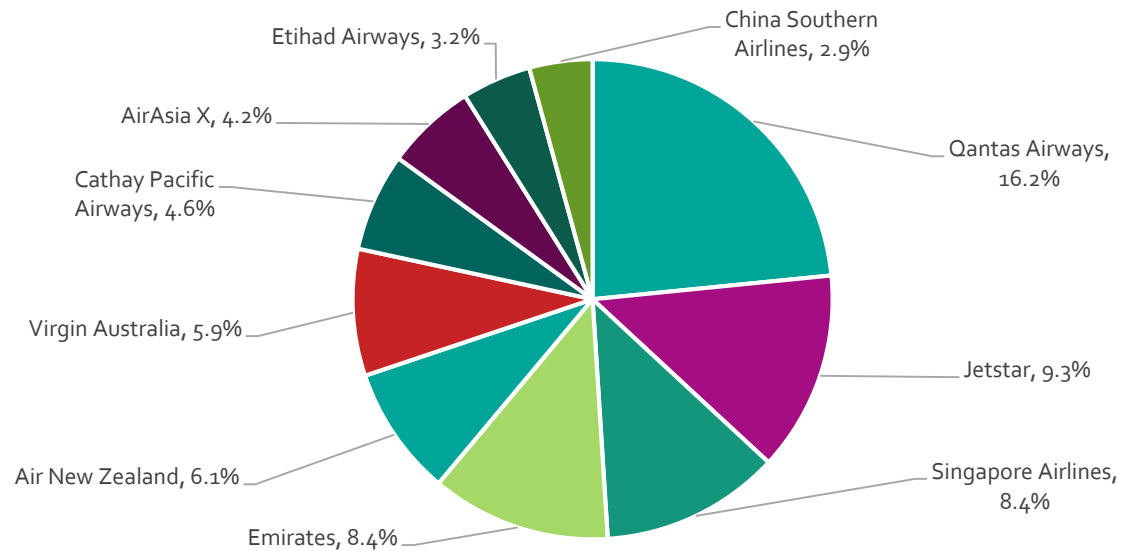
Source: International Airline Activity—Monthly Publications, June 2017

Airline activity - Month End June 2017

This snapshot displays the market share of each airline for international travel for the month of June 2017.

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	June -16	June -17
Qantas Airways	15.9%	16.2%
Jetstar	9.5%	9.3%
Singapore Airlines	8.3%	8.4%
Emirates	8.8%	8.4%
Air New Zealand	5.9%	6.1%
Virgin Australia	6.0%	5.9%
Cathay Pacific Airways	4.9%	4.6%
AirAsia X	3.7%	4.2%
Etihad Airways	3.2%	3.2%
China Southern Airlines	2.7%	2.9%



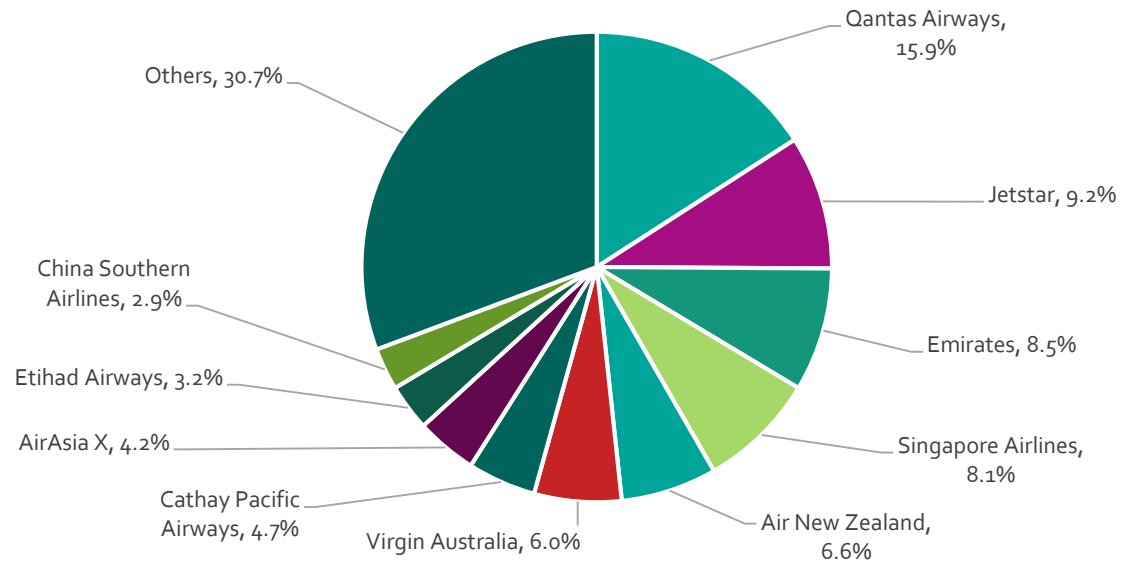
Source: International Airline Activity—Monthly Publications, June 2016 and June 2017

Airline activity – Year End June 2017

This snapshot displays the market share of each airline for international travel of Year end – June 2017.

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	June -16	Year End share of passengers carried	June - 17
Qantas Airways	15.9%	Qantas Airways	15.9%
Jetstar	9.5%	Jetstar	9.2%
Emirates	9.1%	Emirates	8.5%
Singapore Airlines	8.4%	Singapore Airlines	8.1%
Air New Zealand	7.1%	Air New Zealand	6.6%
Virgin Australia	6.9%	Virgin Australia	6.0%
Cathay Pacific Airways	5.1%	Cathay Pacific Airways	4.7%
AirAsia X	3.4%	AirAsia X	4.2%
Etihad Airways	3.1%	Etihad Airways	3.2%
China Southern Airlines	2.8%	China Southern Airlines	2.9%
Others	28.8%	Others	30.7%



Source: International Airline Activity—Monthly Publications, June 2016 and June 2017

For further information please contact:

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