

AFTA Travel Trends

October 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 August 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 August 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 August 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.

	August YE 2016 Total number of international visitors to Australia <i>Inbound</i>	August YE 2016 Total number of international trips by Australians <i>Outbound</i>	August YE 2017 Total number of international visitors to Australia <i>Inbound</i>	August YE 2017 Total number of international trips by Australians <i>Outbound</i>
New Zealand	1,322,300	1,305,300	1,356,200	1,416,000
China	1,190,000	450,400	1,334,900	517,900
UK	702,900	586,000	721,100	622,800
USA	689,400	1,063,100	768,000	1,088,600
Singapore	421,500	374,700	442,900	401,800
Japan	396,000	341,700	433,000	386,500
Malaysia	370,500	251,900	416,400	267,000
South Korea	266,100	68,300	288,300	74,000
India	248,000	306,100	287,000	346,200
Hong Kong	237,900	219,400	270,100	217,100
Indonesia	161,200	1,188,400	189,000	1,215,000
Thailand	87,100	549,400	95,500	565,600
Fiji	34,900	350,000	39,900	349,700
National Total	7,997,800	9,736,300	8,699,100	10,401,900

Source: August 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 – August 2017

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

Key Highlights

In 2017 only three months grew quicker than the previous year.

Winter had an average of growth of 7.5% each month, down from 12.3% in 2016.

Month	Total number of travellers 2016	2016 Year end change	Total number of travellers 2017	2017 Year end change	2017 Performance
September	634,000	8.8%	711,800	12.3%	Positive
October	633,100	7.0%	709,200	12.0%	Positive
November	651,500	11.3%	701,600	7.7%	Positive
December	661,500	11.5%	709,500	7.3%	Positive
January	658,000	11.7%	712,400	8.3%	Positive
February	644,000	6.6%	717,300	11.4%	Positive
March	674,600	9.1%	710,200	5.3%	Positive
April	674,900	11.6%	748,300	10.9%	Positive
May	680,200	12.0%	734,900	8.0%	Positive
June	698,500	12.9%	730,800	4.6%	Positive
July	693,400	13.1%	748,400	7.9%	Positive
August	694,100	11.0%	764,700	10.2%	Positive
Total	7,997,800	10.6%	8,699,100	8.8%	Positive



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

Year end changes to top Australian source markets – August 2017

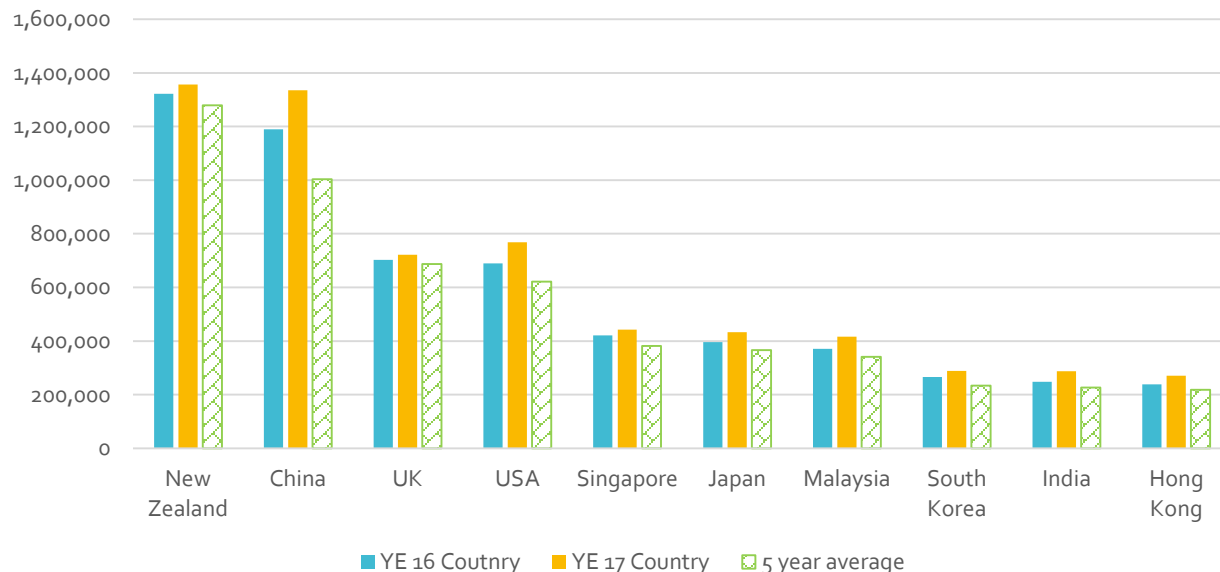
This section displays the performance of the top Australian source markets for international travellers as of August Year end 2016 and 2017.

Key Highlights

China narrows the gap to NZ with an average growth of 17.8% per year of the last two years.

Japan growth slows by 10% from 19.6% to 9.3% year on year.

Destination	Total number of travellers 2016	2016 Year end change	Total number of travellers 2017	2017 Year end change	2017 Performance
New Zealand	1,322,300	2.5%	1,356,200	2.6%	Positive
China	1,190,000	23.4%	1,334,900	12.2%	Positive
UK	702,900	4.1%	721,100	2.6%	Positive
USA	689,400	16.6%	768,000	11.4%	Positive
Singapore	421,500	12.7%	442,900	5.1%	Positive
Japan	396,000	19.6%	433,000	9.3%	Positive
Malaysia	370,500	10.4%	416,400	12.4%	Positive
South Korea	266,100	24.9%	288,300	8.3%	Positive
India	248,000	8.8%	287,000	15.7%	Positive
Hong Kong	237,900	13.2%	270,100	13.5%	Positive
National Total	7,997,800	10.6%	8,699,100	8.8%	Positive



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

Monthly changes to top Australian source markets – August 2017

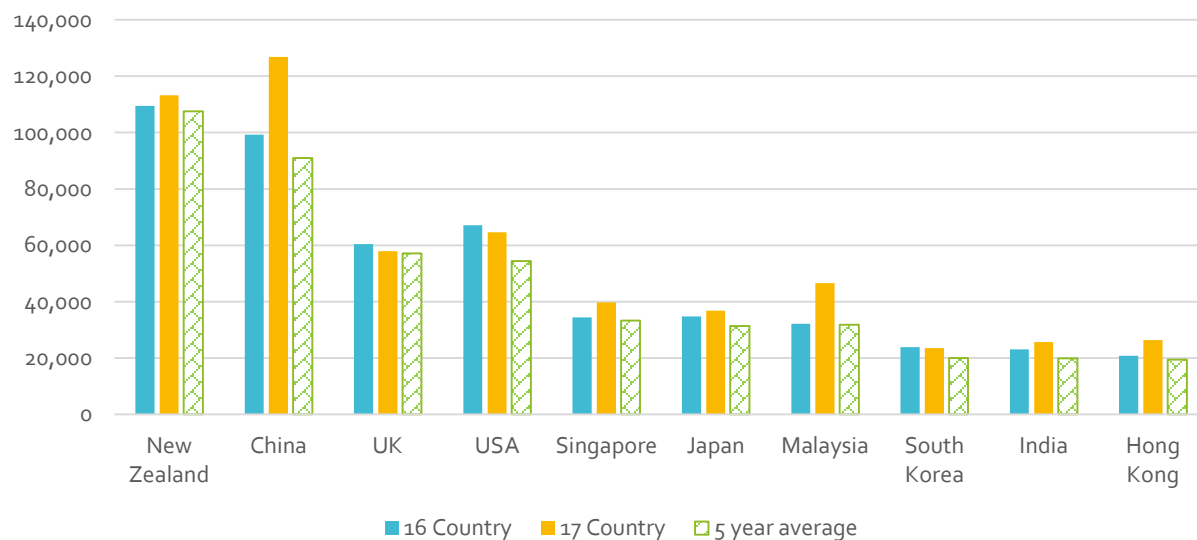
This section displays the performance of the top Australian source markets for international tourists comparing the month of August 2016 to August 2017.

Key Highlights

The USA softens after record growth from the previous period but is still well above the 5 year average.

The 5 major markets grew at an average of 7.8%, with the majority of growth from China.

Destination	Total number of travellers 2016	2016 Year end change	Total number of travellers 2017	2017 Year end change	2017 Performance
New Zealand	109,500	-1.5%	113,200	3.4%	Positive
China	99,200	11.5%	126,900	27.9%	Positive
UK	60,400	3.4%	57,900	-4.1%	Negative
USA	67,100	32.3%	64,600	-3.7%	Negative
Singapore	34,400	0.6%	39,700	15.4%	Positive
Japan	34,800	22.5%	36,800	5.7%	Positive
Malaysia	32,200	17.1%	46,600	44.7%	Positive
South Korea	23,900	29.2%	23,500	-1.7%	Neutral
India	23,100	18.5%	25,700	11.3%	Positive
Hong Kong	20,800	11.8%	26,300	26.4%	Positive
National Total	694,100	11.0%	764,700	10.2%	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 – August 2017

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

Key Highlights

10 months out of 12 experience stronger growth than the previous year.

2017 yearly growth hits 6.8% nearly 2% higher than 2016.

Month	Total number of travellers 2016	2016 Year end change	Total number of travellers 2017	2017 Year end change	2017 Performance
September	793,200	3.4%	845,500	6.6%	Positive
October	787,900	3.7%	836,500	6.2%	Positive
November	803,400	4.3%	838,400	4.4%	Positive
December	810,100	6.8%	873,100	7.8%	Positive
January	807,300	3.6%	849,600	5.2%	Positive
February	794,700	6.1%	887,800	11.7%	Positive
March	806,700	3.5%	857,200	6.3%	Positive
April	817,700	5.0%	894,000	9.3%	Positive
May	815,700	4.9%	895,000	9.7%	Positive
June	824,600	4.9%	872,700	5.8%	Positive
July	836,000	8.3%	873,600	4.5%	Positive
August	839,000	4.9%	878,500	4.7%	Positive
Total	9,736,300	4.9%	10,401,900	6.8%	Positive



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

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

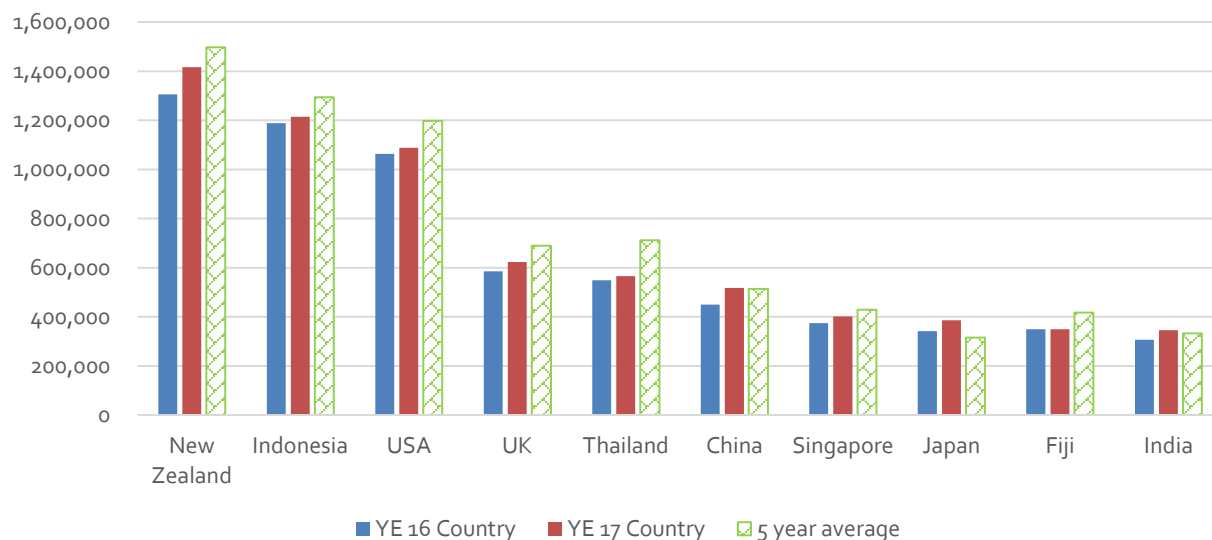
This section displays the performance of the top destinations Australian's are travelling to as of August Year end 2016 and 2017.

Key Highlights

Outbound growth to China is up on average of 11.8% per annum for the last two years.

Singapore has a strong year with growth up 5.7% to 7.2% 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	1,305,300	5.8%	1,416,000	8.5%	Positive
Indonesia	1,188,400	6.8%	1,215,000	2.2%	Positive
USA	1,063,100	4.8%	1,088,600	2.4%	Positive
UK	586,000	2.9%	622,800	6.3%	Positive
Thailand	549,400	-3.6%	565,600	2.9%	Positive
China	450,400	8.7%	517,900	15.0%	Positive
Singapore	374,700	1.5%	401,800	7.2%	Positive
Japan	341,700	21.8%	386,500	13.1%	Positive
Fiji	350,000	1.5%	349,700	-0.1%	Neutral
India	306,100	8.3%	346,200	13.1%	Positive
National Total	9,736,300	4.9%	10,401,900	6.8%	Positive



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

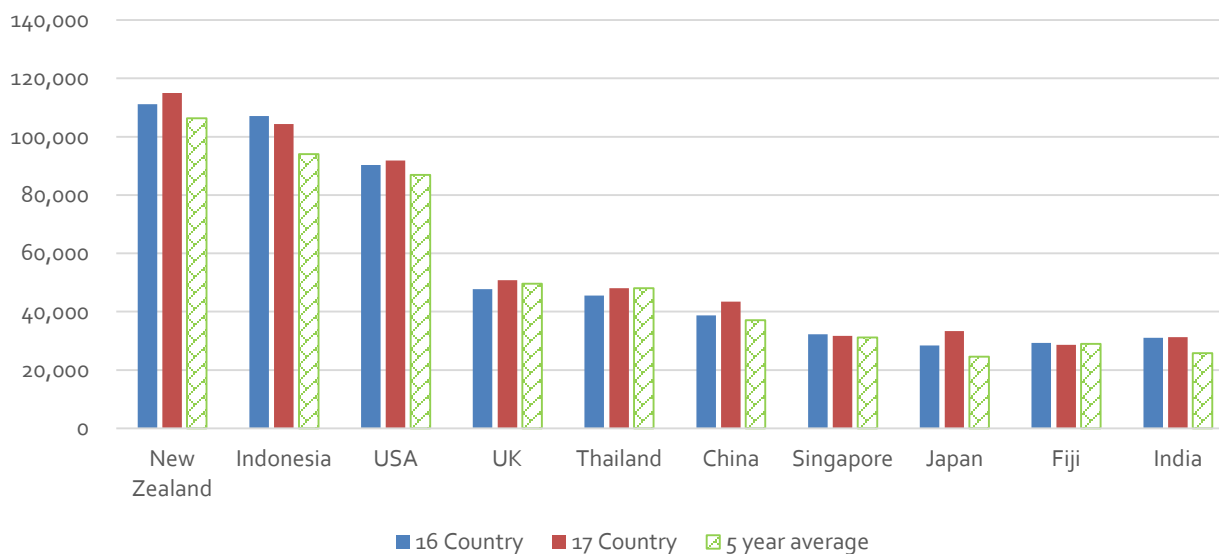
This section displays the performance of the top destinations Australian's are travelling to comparing August 2016 to August 2017

Key Highlights

UK is back above the 5 year average with a growth rate of 6.5% in 2017.

India stabilises after it's strong growth in 2016.

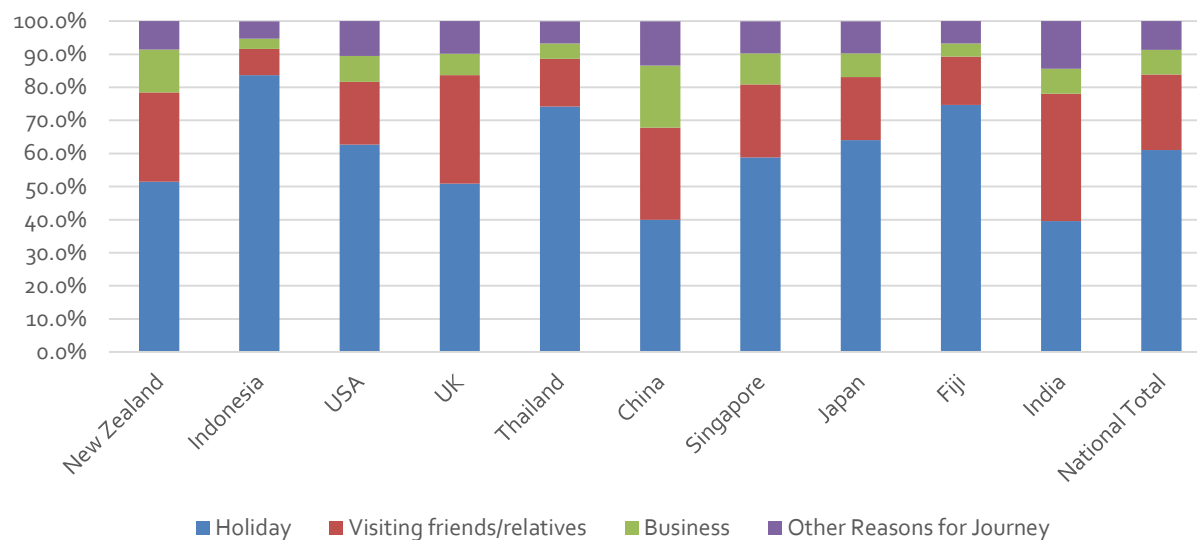
Destination	Total number of travellers 2016	2016 Year end change	Total number of travellers 2017	2017 Year end change	2017 Performance
New Zealand	111,200	5.5%	115,000	3.4%	Positive
Indonesia	107,100	21.7%	104,400	-2.5%	Negative
USA	90,300	2.6%	91,800	1.7%	Neutral
UK	47,700	-8.4%	50,800	6.5%	Positive
Thailand	45,500	-8.6%	48,000	5.5%	Positive
China	38,700	2.1%	43,400	12.1%	Positive
Singapore	32,200	-1.8%	31,700	-1.6%	Neutral
Japan	28,400	6.0%	33,300	17.3%	Positive
Fiji	29,300	2.1%	28,600	-2.4%	Negative
India	31,000	23.0%	31,300	1.0%	Neutral
National Total	839,000	4.9%	878,500	4.7%	Positive



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

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

	Holiday	Visiting friends/relatives	Business	Other Reasons for Journey
New Zealand	51.4%	27.1%	12.9%	8.6%
Indonesia	83.7%	7.9%	3.1%	5.3%
USA	62.7%	18.9%	7.8%	10.6%
UK	50.9%	32.8%	6.5%	9.8%
Thailand	74.2%	14.4%	4.7%	6.7%
China	40.0%	27.8%	18.8%	13.4%
Singapore	58.8%	22.1%	9.4%	9.7%
Japan	64.1%	19.0%	7.1%	9.7%
Fiji	74.7%	14.6%	3.9%	6.8%
India	39.6%	38.5%	7.6%	14.3%
National Total	61.0%	22.8%	7.5%	8.6%



Source: August 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 July 2017 (includes five dedicated freight airlines but excludes airlines operating only via code share arrangements).



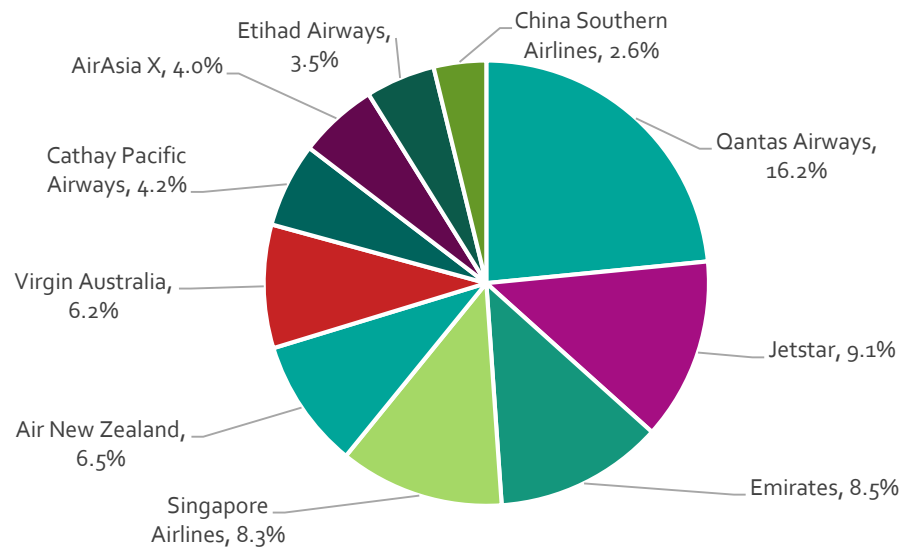
Source: International Airline Activity—Monthly Publications, July 2017

Airline activity - Month End July 2017

This snapshot displays the market share of each airline for international travel for the month of July 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	July -16	July -17
Qantas Airways	15.5%	16.2%
Jetstar	9.1%	9.1%
Emirates	8.8%	8.5%
Singapore Airlines	8.3%	8.3%
Air New Zealand	6.4%	6.5%
Virgin Australia	6.1%	6.2%
Cathay Pacific Airways	4.3%	4.2%
AirAsia X	4.1%	4.0%
Etihad Airways	3.6%	3.5%
China Southern Airlines	2.4%	2.6%



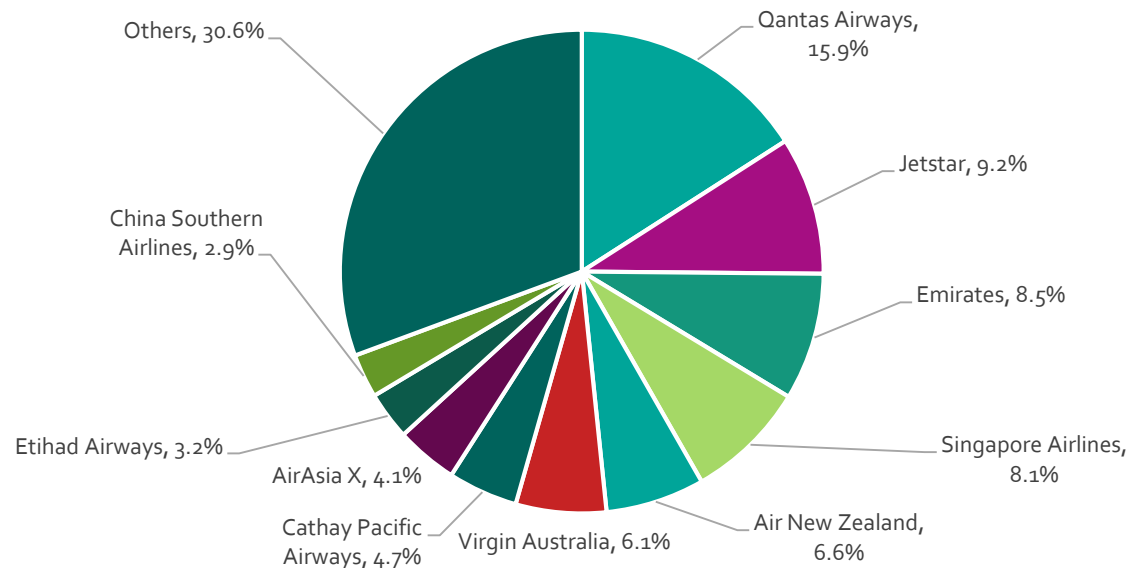
Source: International Airline Activity—Monthly Publications, July 2016 and July 2017

Airline activity – Year End July 2017

This snapshot displays the market share of each airline for international travel of Year end – July 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	July - 16	Year End share of passengers carried	July - 17
Qantas Airways	15.9%	Qantas Airways	15.9%
Jetstar	9.5%	Jetstar	9.2%
Emirates	9.1%	Emirates	8.5%
Singapore Airlines	8.3%	Singapore Airlines	8.1%
Air New Zealand	7.0%	Air New Zealand	6.6%
Virgin Australia	6.8%	Virgin Australia	6.1%
Cathay Pacific Airways	5.0%	Cathay Pacific Airways	4.7%
AirAsia X	3.5%	AirAsia X	4.1%
Etihad Airways	3.2%	Etihad Airways	3.2%
China Southern Airlines	2.8%	China Southern Airlines	2.9%
Others	28.9%	Others	30.6%



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

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