

AFTA Travel Trends

December 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 October 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 October 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 October 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.

	October YE 2016 Total number of international visitors to Australia <i>Inbound</i>	October YE 2016 Total number of international trips by Australians <i>Outbound</i>	October YE 2017 Total number of international visitors to Australia <i>Inbound</i>	October YE 2017 Total number of international trips by Australians <i>Outbound</i>
New Zealand	1,333,500	1,324,800	1,355,400	1,419,700
China	1,208,200	456,000	1,366,900	524,300
UK	708,600	582,400	713,800	630,700
USA	705,000	1,062,800	774,700	1,093,400
Singapore	430,000	379,400	444,500	400,900
Japan	407,100	352,100	432,300	389,500
Malaysia	385,500	252,800	405,400	266,300
South Korea	277,200	71,000	300,900	74,200
India	256,200	214,200	296,300	347,800
Hong Kong	240,400	222,500	279,000	219,100
Indonesia	167,200	1,204,800	190,600	1,209,600
Thailand	89,400	549,600	98,100	569,300
Fiji	35,000	348,500	41,100	347,900
National Total	8,150,900	9,836,500	8,769,500	10,541,400

Source: October 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 – October 2017

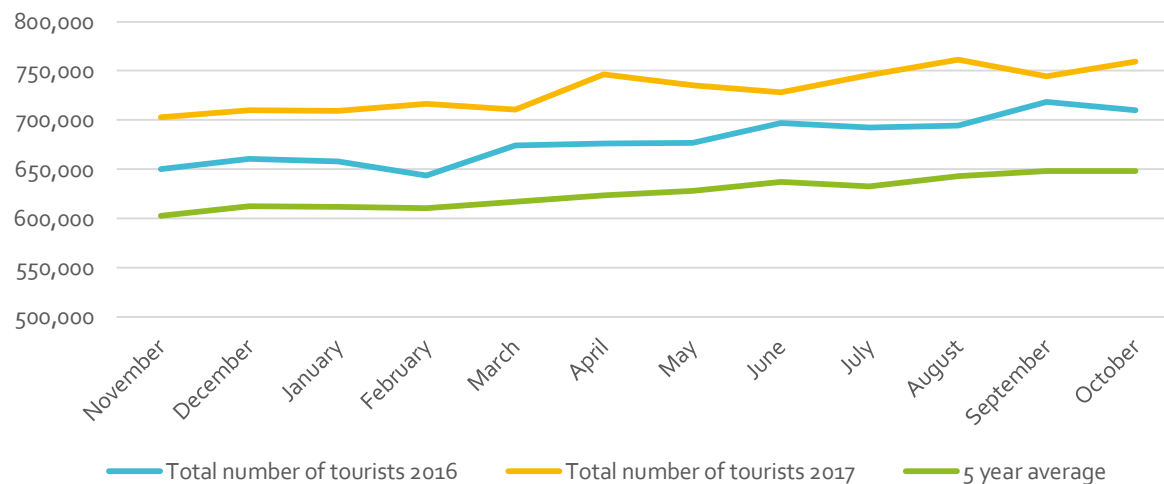
This section displays the number of international tourists travelling to Australia each month as of October Year end 2016 and 2017.

Key Highlights

October saw the second highest total passengers movements in 2017.

Percentage growth is on the increase after a dip in September.

Month	Total number of travellers 2016	2016 Year end change	Total number of travellers 2017	2017 Year end change	2017 Performance
November	650,000	11.0%	702,500	8.1%	Positive
December	660,500	11.2%	709,600	7.4%	Positive
January	658,100	11.8%	709,500	7.8%	Positive
February	643,700	6.6%	716,600	11.3%	Positive
March	674,100	9.2%	710,600	5.4%	Positive
April	676,100	12.0%	746,500	10.4%	Positive
May	676,900	11.5%	735,100	8.6%	Positive
June	696,600	12.9%	728,100	4.5%	Positive
July	692,200	13.1%	745,800	7.7%	Positive
August	694,200	11.1%	761,500	9.7%	Positive
September	718,500	12.2%	744,500	3.6%	Positive
October	710,000	12.0%	759,200	6.9%	Positive
Total	8,150,900	11.2%	8,769,500	7.6%	Positive



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

Year end changes to top Australian source markets – October 2017

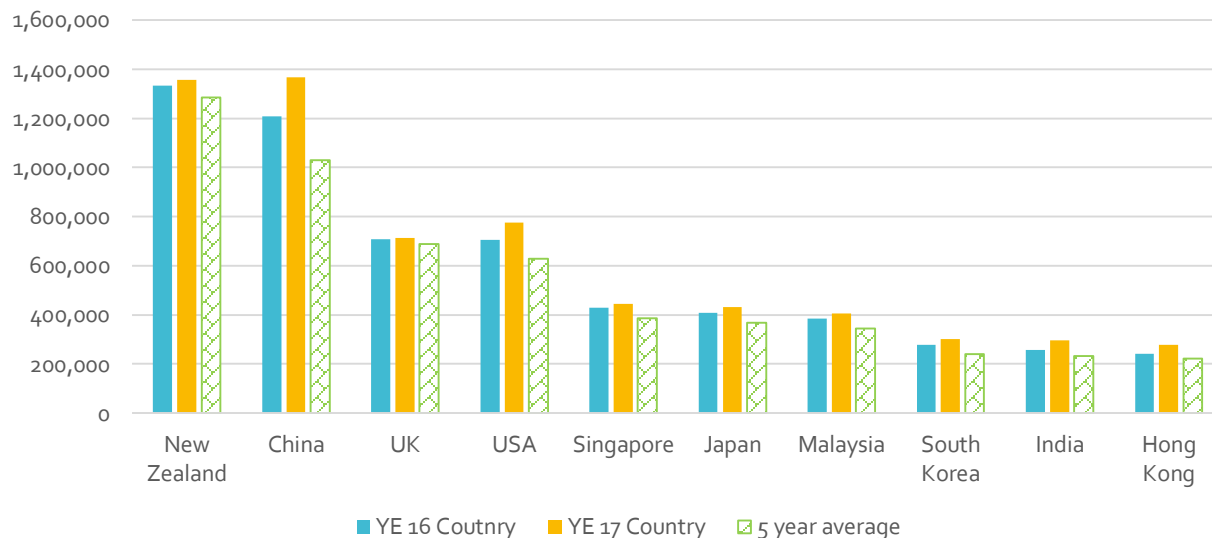
This section displays the performance of the major Australian source markets for international travellers as of October Year end 2016 and 2017.

Key Highlights

Both New Zealand and the UK have a neutral performance for the second time in as many months.

Percentage growth from South Korea is down 19.4% from 2016 levels.

Destination	Total number of travellers 2016	2016 Year end change	Total number of travellers 2017	2017 Year end change	2017 Performance
New Zealand	1,333,500	2.6%	1,355,400	1.6%	Neutral
China	1,208,200	20.6%	1,366,900	13.1%	Positive
UK	708,600	4.5%	713,800	0.7%	Neutral
USA	705,000	17.2%	774,700	9.9%	Positive
Singapore	430,000	13.7%	444,500	3.4%	Positive
Japan	407,100	21.1%	432,300	6.2%	Positive
Malaysia	385,500	14.9%	405,400	5.2%	Positive
South Korea	277,200	27.9%	300,900	8.5%	Positive
India	256,200	11.0%	296,300	15.7%	Positive
Hong Kong	240,400	11.5%	279,000	16.1%	Positive
National Total	8,150,900	11.2%	8,769,500	7.6%	Positive



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

Monthly changes to top Australian source markets – October 2017

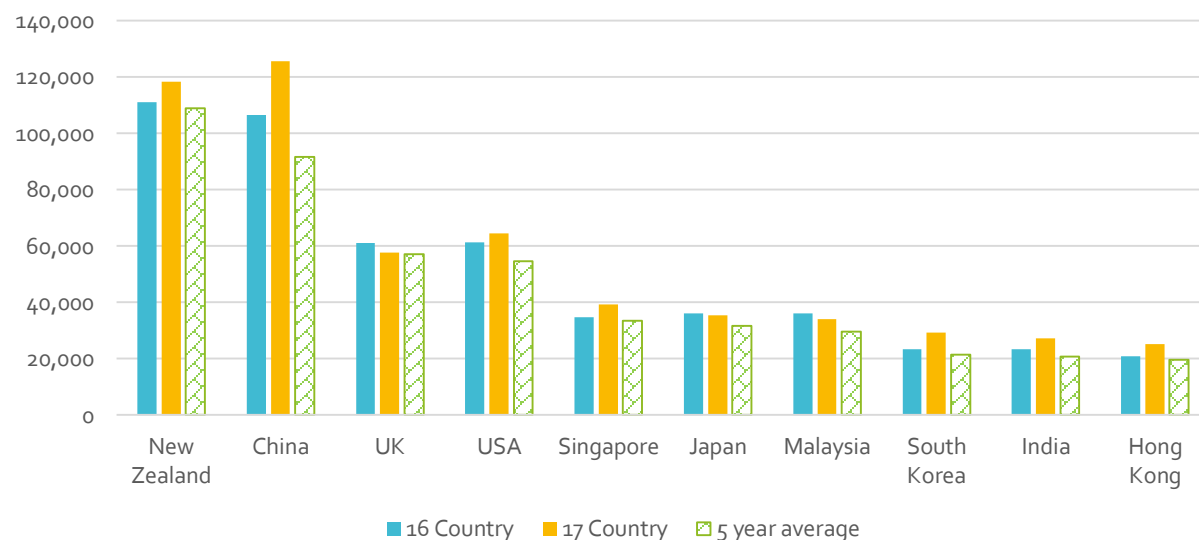
This section displays the performance of the major Australian source markets for international tourists comparing the month of October 2016 to October 2017.

Key Highlights

Arrivals from China top the list in total numbers for the second consecutive month.

Total travellers arriving from the UK have increased by just 2520 from 2013 levels.

Destination	Total number of travellers 2016	2016 Year end change	Total number of travellers 2017	2017 Year end change	2017 Performance
New Zealand	111,000	1.8%	118,400	6.7%	Positive
China	106,500	12.2%	125,700	18.0%	Positive
UK	61,100	7.0%	57,700	-5.6%	Negative
USA	61,300	12.1%	64,400	5.1%	Positive
Singapore	34,700	6.4%	39,200	13.0%	Positive
Japan	36,000	22.9%	35,400	-1.7%	Neutral
Malaysia	36,200	38.2%	34,100	-5.8%	Negative
South Korea	23,500	18.1%	29,400	25.1%	Positive
India	23,300	22.0%	27,200	16.7%	Positive
Hong Kong	20,800	5.1%	25,200	21.2%	Positive
National Total	710,000	12.0%	759,200	6.9%	Positive



Source: October 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 – October 2017

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

Key Highlights

Only 6 months out of 12
experience higher growth than
the previous year.

Overall year end growth
percentage the highest in 5 years.

Month	Total number of travellers 2016	2016 Year end change	Total number of travellers 2017	2017 Year end change	2017 Performance
November	804,000	4.4%	836,800	4.1%	Positive
December	810,600	6.9%	838,700	3.5%	Positive
January	806,600	3.6%	872,900	8.2%	Positive
February	794,000	6.0%	850,700	7.1%	Positive
March	808,800	3.5%	887,800	9.8%	Positive
April	815,800	4.7%	857,000	5.1%	Positive
May	815,300	5.1%	893,700	9.6%	Positive
June	824,600	4.9%	894,800	8.5%	Positive
July	834,600	8.2%	872,800	4.6%	Positive
August	837,900	4.9%	874,300	4.3%	Positive
September	843,300	6.5%	879,000	4.2%	Positive
October	841,000	6.4%	892,900	6.2%	Positive
Total	9,836,500	5.4%	10,451,400	6.3%	Positive



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

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

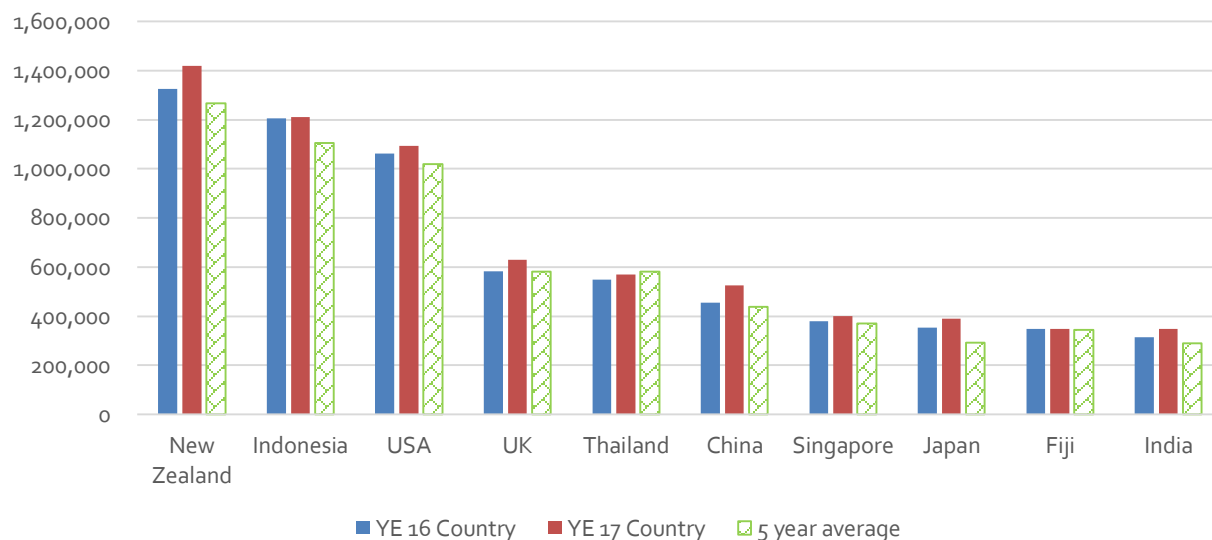
This section displays the performance of the major destinations Australian's are travelling to as of October Year end 2016 and 2017.

Key Highlights

Growth in travellers to Fiji has remained neutral since 2013.

Visitors to Japan have increased by over 100,000 since 2015.

Destination	Total number of travellers 2016	2016 Year end change	Total number of travellers 2017	2017 Year end change	2017 Performance
New Zealand	1,324,800	5.8%	1,419,700	7.2%	Positive
Indonesia	1,204,800	8.9%	1,209,600	0.4%	Neutral
USA	1,062,800	3.7%	1,093,400	2.9%	Positive
UK	582,400	0.9%	630,700	8.3%	Positive
Thailand	549,600	-3.8%	569,300	3.6%	Positive
China	456,000	8.3%	524,300	15.0%	Positive
Singapore	379,400	2.7%	400,900	5.7%	Positive
Japan	352,100	22.9%	389,500	10.6%	Positive
Fiji	348,500	-0.3%	347,900	-0.2%	Neutral
India	314,200	11.5%	347,800	10.7%	Positive
National Total	9,836,500	5.4%	10,451,400	6.3%	Positive



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

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

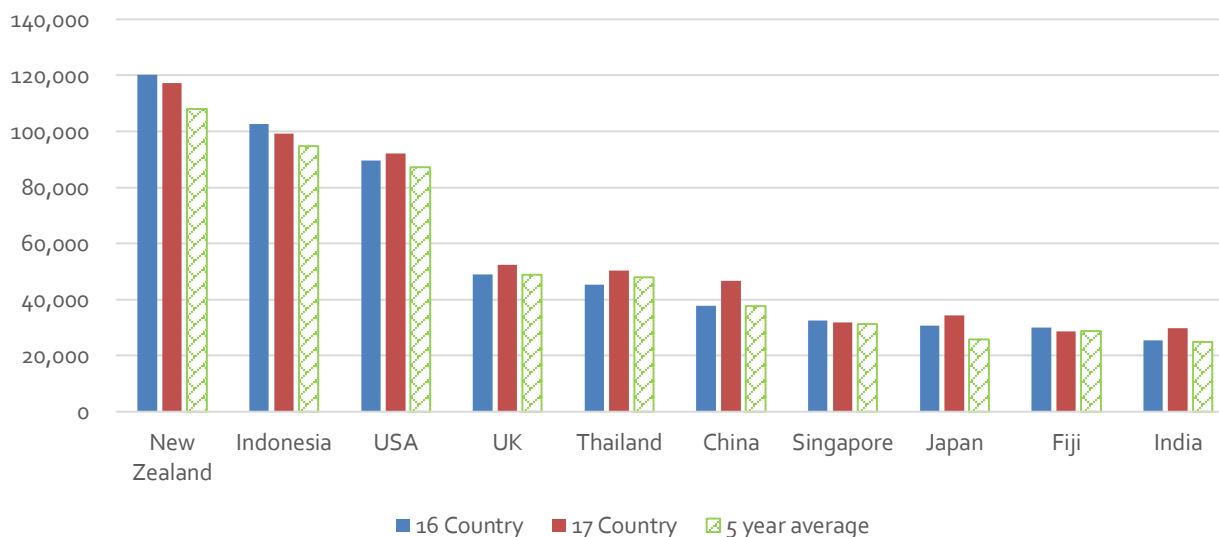
This section displays the performance of the major destinations Australian's are travelling to comparing October 2016 to October 2017

Key Highlights

China sees a growth of 20% on 2016 levels.

New Zealand saw negative growth, down to it's lowest total number of travellers since 2015.

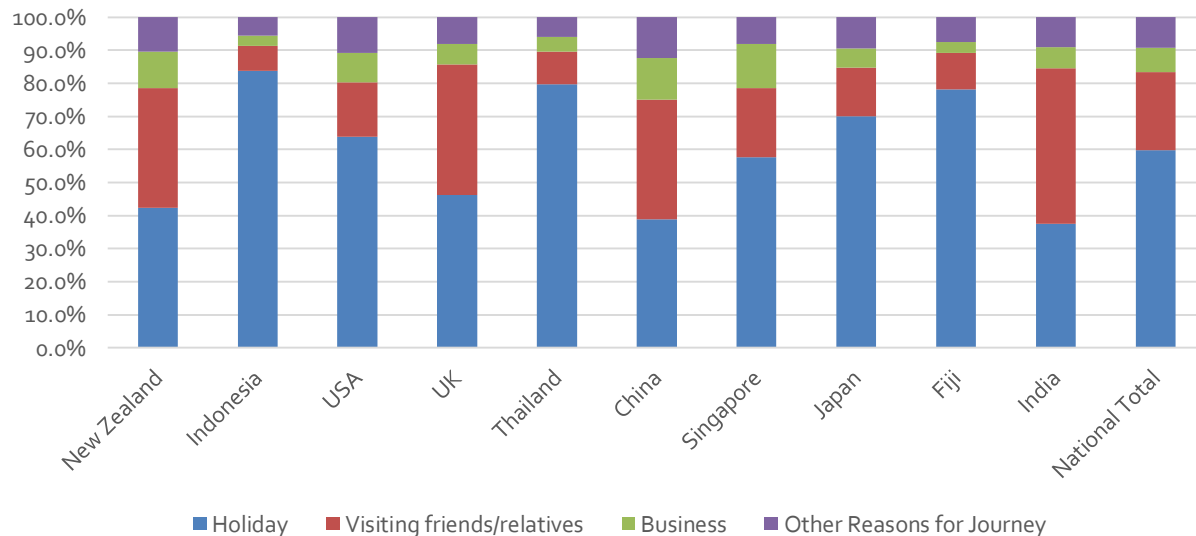
Destination	Total number of travellers 2016	2016 Year end change	Total number of travellers 2017	2017 Year end change	2017 Performance
New Zealand	120,200	14.6%	117,300	Negative	-2.4%
Indonesia	102,500	9.0%	99,200	Negative	-3.2%
USA	89,600	1.5%	92,000	Positive	2.7%
UK	49,000	-4.1%	52,300	Positive	6.7%
Thailand	45,400	1.1%	50,400	Positive	11.0%
China	37,800	3.3%	46,600	Positive	23.3%
Singapore	32,600	7.2%	31,800	Negative	-2.5%
Japan	30,800	23.2%	34,300	Positive	11.4%
Fiji	30,000	1.7%	28,700	Negative	-4.3%
India	25,400	8.1%	29,800	Positive	17.3%
National Total	841,000	6.4%	892,900	Positive	6.2%



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

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

	Holiday	Visiting friends/relatives	Business	Other Reasons for Journey
New Zealand	42.3%	36.3%	11.0%	10.3%
Indonesia	83.8%	7.5%	3.1%	5.6%
USA	63.9%	16.4%	9.1%	10.7%
UK	46.2%	39.5%	6.1%	8.2%
Thailand	79.7%	10.0%	4.4%	5.9%
China	38.9%	36.1%	12.8%	12.3%
Singapore	57.8%	20.8%	13.5%	8.0%
Japan	70.1%	14.7%	5.7%	9.5%
Fiji	78.1%	11.0%	3.4%	7.5%
India	37.6%	46.9%	6.4%	9.0%
National Total	59.9%	23.6%	7.4%	9.2%



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



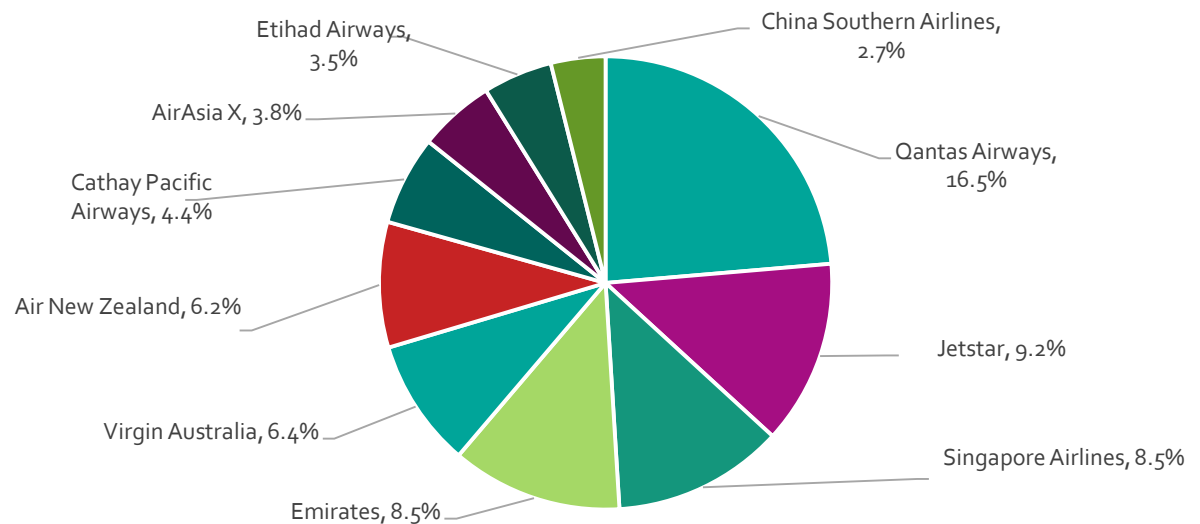
Source: International Airline Activity—Monthly Publications, September 2017

Airline activity - Month End September 2017

This snapshot displays the market share of each airline for international travel for the month of September 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	September - 16	September - 17
Qantas Airways	15.5%	16.5%
Jetstar	9.4%	9.2%
Singapore Airlines	8.0%	8.5%
Emirates	8.9%	8.5%
Virgin Australia	6.6%	6.4%
Air New Zealand	6.5%	6.2%
Cathay Pacific Airways	4.7%	4.4%
AirAsia X	4.1%	3.8%
Etihad Airways	3.4%	3.5%
China Southern Airlines	2.5%	2.7%



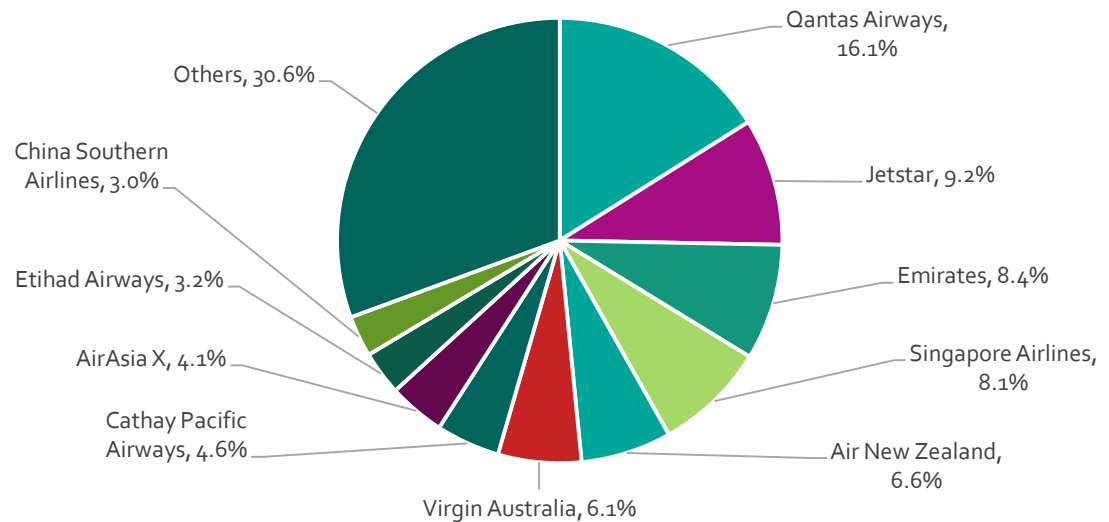
Source: International Airline Activity—Monthly Publications, September 2016 and September 2017

Airline activity – Year End September 2017

This snapshot displays the market share of each airline for international travel of Year end – September 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	September -16	Year End share of passengers carried	September - 17
Qantas Airways	15.8%	Qantas Airways	16.1%
Jetstar	9.5%	Jetstar	9.2%
Emirates	8.9%	Emirates	8.4%
Singapore Airlines	8.2%	Singapore Airlines	8.1%
Air New Zealand	6.9%	Air New Zealand	6.6%
Virgin Australia	6.6%	Virgin Australia	6.1%
Cathay Pacific Airways	5.0%	Cathay Pacific Airways	4.6%
AirAsia X	3.7%	AirAsia X	4.1%
Etihad Airways	3.2%	Etihad Airways	3.2%
China Southern Airlines	2.8%	China Southern Airlines	3.0%
Others	29.4%	Others	30.6%



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

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