

AFTA Travel Trends

January 2018



Inbound and Outbound overview

Introduction

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

	November YE 2016 Total number of international visitors to Australia <i>Inbound</i>	November YE 2016 Total number of international trips by Australians <i>Outbound</i>	November YE 2017 Total number of international visitors to Australia <i>Inbound</i>	November YE 2017 Total number of international trips by Australians <i>Outbound</i>
China	1,218,500	459,900	1,373,000	537,400
New Zealand	1,335,100	1,329,500	1,360,300	1,431,100
UK	709,500	576,400	721,800	631,600
USA	711,500	1,069,600	782,000	1,080,400
Singapore	429,400	376,200	446,200	411,500
Japan	412,300	352,200	434,200	399,800
Malaysia	389,300	254,200	404,100	273,500
South Korea	281,400	70,900	301,000	72,800
India	260,200	319,900	300,200	357,500
Hong Kong	241,800	221,600	283,700	222,700
Indonesia	168,900	1,227,300	192,400	1,193,800
Thailand	90,400	546,400	98,100	580,200
Fiji	35,500	347,600	41,600	346,900
National Total	8,203,600	9,872,600	8,824,600	10,549,900

Source: November 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 – November 2017

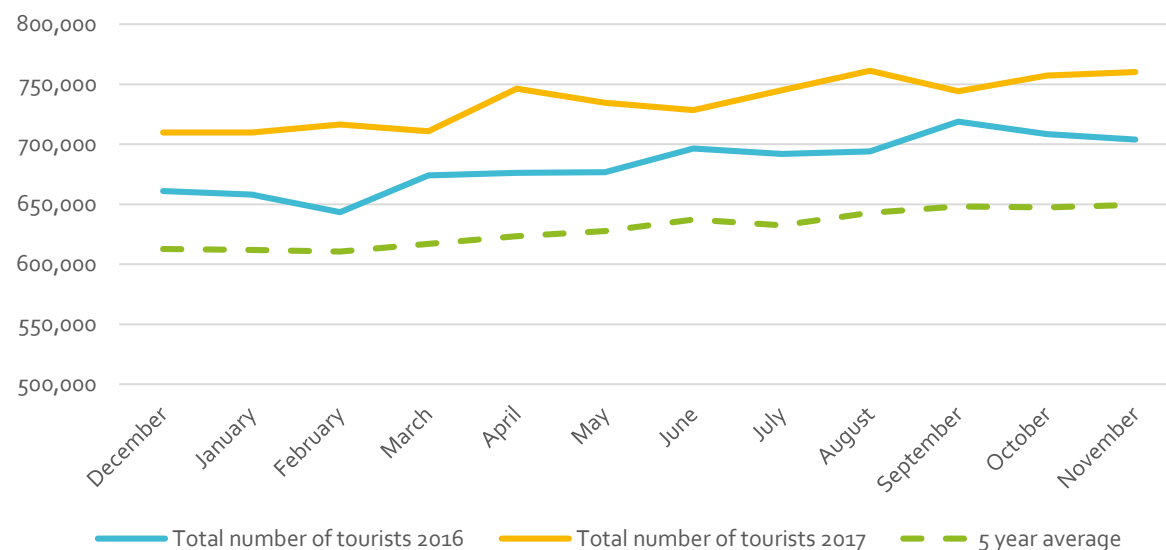
This section displays the number of international tourists travelling to Australia each month as of November Year end 2016 and 2017.

Key Highlights

A slowing a growth but still the equal second highest in the last five years.

Spring averages a growth of 7.1%.

Month	Total number of travellers 2016	2016 Year end change	Total number of travellers 2017	2017 Year end change	2017 Performance
December	661,000	11.3%	709,900	7.4%	Positive
January	658,200	11.8%	709,700	7.8%	Positive
February	643,500	6.6%	716,500	11.3%	Positive
March	674,200	9.2%	710,900	5.4%	Positive
April	676,100	12.0%	746,300	10.4%	Positive
May	676,800	11.5%	734,500	8.5%	Positive
June	696,500	12.8%	728,600	4.6%	Positive
July	691,900	13.1%	745,000	7.7%	Positive
August	694,100	11.1%	761,400	9.7%	Positive
September	718,900	12.3%	744,100	3.5%	Positive
October	708,400	11.9%	757,400	6.9%	Positive
November	704,000	8.2%	760,300	8.0%	Positive
Total	8,203,600	11.0%	8,824,600	7.6%	Positive



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

Year end changes to top Australian source markets – November 2017

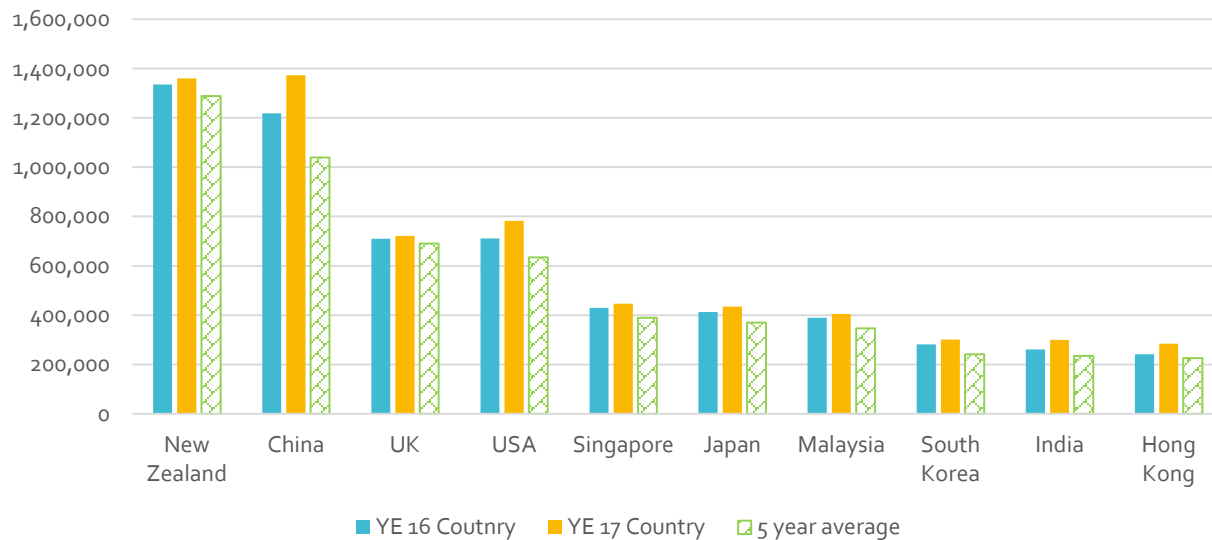
This section displays the performance of the major Australian source markets for international travellers as of November Year end 2016 and 2017.

Key Highlights

Strong growth continues from Asian markets averaging 8.2%.

China records an average growth of 16%.

Destination	Total number of travellers 2016	2016 Year end change	Total number of travellers 2017	2017 Year end change	2017 Performance
New Zealand	1,335,100	2.3%	1,360,300	1.9%	Neutral
China	1,218,500	19.2%	1,373,000	12.7%	Positive
UK	709,500	3.9%	721,800	1.7%	Neutral
USA	711,500	17.3%	782,000	9.9%	Positive
Singapore	429,400	12.2%	446,200	3.9%	Positive
Japan	412,300	21.4%	434,200	5.3%	Positive
Malaysia	389,300	15.3%	404,100	3.8%	Positive
South Korea	281,400	27.5%	301,000	7.0%	Positive
India	260,200	11.6%	300,200	15.4%	Positive
Hong Kong	241,800	11.0%	283,700	17.3%	Positive
National Total	8,203,600	11.0%	8,824,600	7.6%	Positive



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

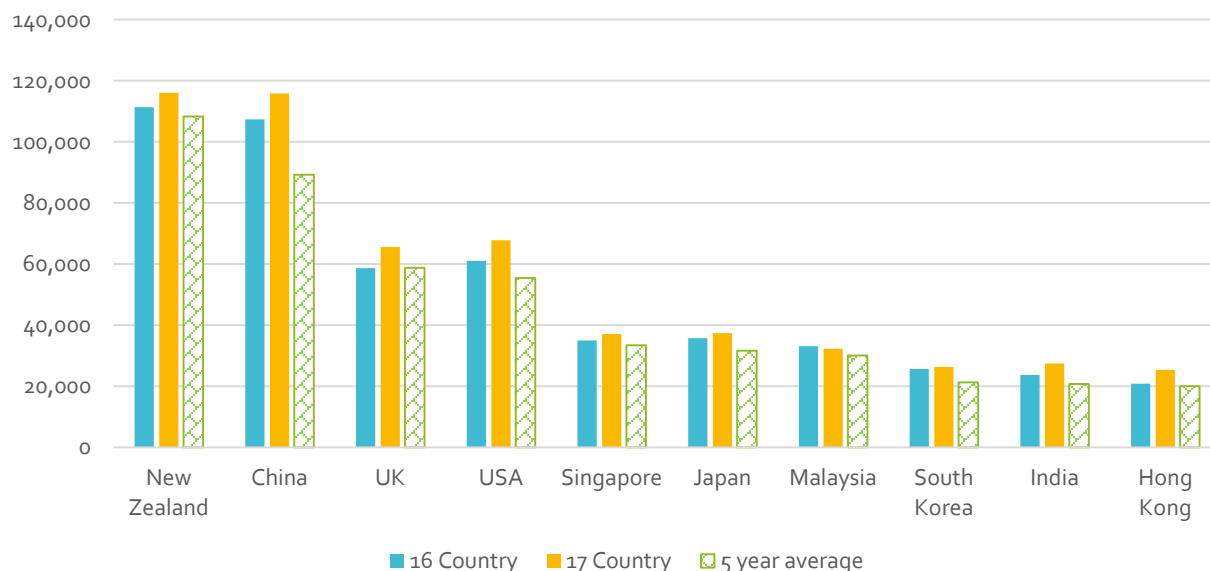
Monthly changes to top Australian source markets – November 2017

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

Key Highlights

New Zealand rebounds from 1.4% growth in 2016 to a 4.2% in 2017 keeping the number 1 source market in November.

Destination	Total number of travellers 2016	2016 Year end change	Total number of travellers 2017	2017 Year end change	2017 Performance
New Zealand	111,300	1.4%	116,000	4.2%	Positive
China	107,400	11.8%	115,800	7.8%	Positive
UK	58,600	0.5%	65,500	11.8%	Negative
USA	61,000	12.1%	67,800	11.1%	Positive
Singapore	35,000	-1.1%	37,100	6.0%	Positive
Japan	35,700	16.3%	37,400	4.8%	Positive
Malaysia	33,100	14.9%	32,200	-2.7%	Negative
South Korea	25,600	20.8%	26,300	2.7%	Positive
India	23,600	20.4%	27,400	16.1%	Positive
Hong Kong	20,800	6.7%	25,300	21.6%	Positive
National Total	704,000	8.2%	760,300	8.0%	Positive



Source: November 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 – November 2017

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

Key Highlights

Spring travel was up on average 5.8%.

November year end up nearly 2% on 2016.

Month	Total number of travellers 2016	2016 Year end change	Total number of travellers 2017	2017 Year end change	2017 Performance
December	810,300	6.8%	871,300	7.5%	Positive
January	806,700	3.6%	851,100	5.5%	Positive
February	794,200	6.0%	887,400	11.7%	Positive
March	807,900	3.5%	857,200	6.1%	Positive
April	816,100	4.7%	893,200	9.4%	Positive
May	815,600	5.1%	893,600	9.6%	Positive
June	824,000	4.8%	872,500	5.9%	Positive
July	835,300	8.2%	872,800	4.5%	Positive
August	838,200	4.9%	879,100	4.9%	Positive
September	844,200	6.6%	891,200	5.6%	Positive
October	841,000	6.3%	888,500	5.6%	Positive
November	839,100	4.4%	892,000	6.3%	Positive
Total	9,872,600	5.4%	10,549,900	6.9%	Positive



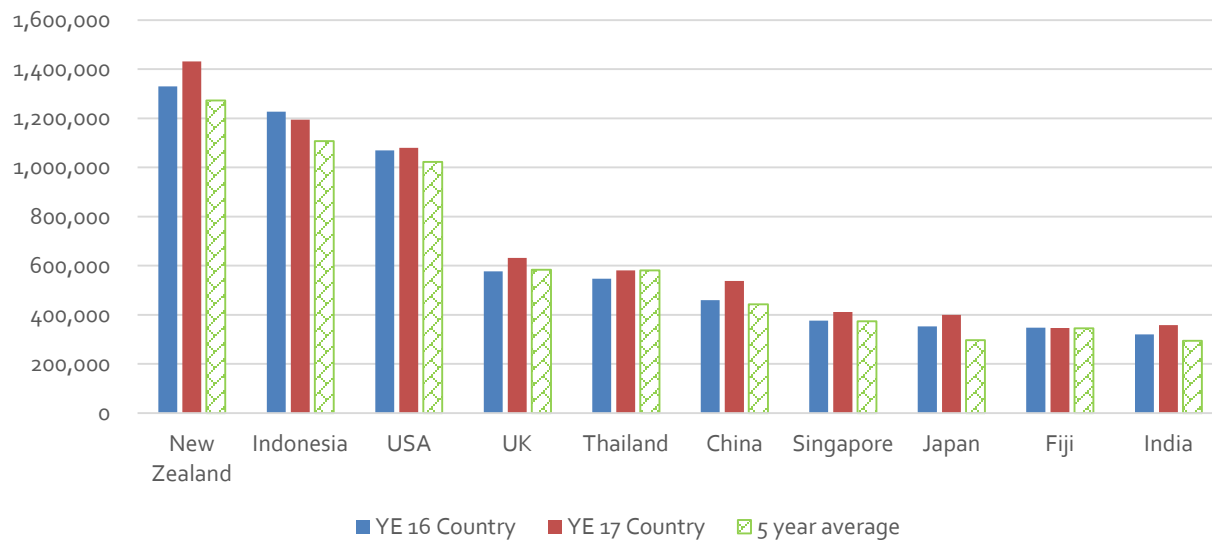
Year end changes to popular international destinations travelled to by Australian's – November 2017

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

Key Highlights

The UK and Thailand have strong turn around up on average of 7.9% compared to 2016 where they were down by 3.4%.

Destination	Total number of travellers 2016	2016 Year end change	Total number of travellers 2017	2017 Year end change	2017 Performance
New Zealand	1,329,500	6.1%	1,431,100	7.6%	Positive
Indonesia	1,227,300	12.3%	1,193,800	-2.7%	Negative
USA	1,069,600	4.2%	1,080,400	1.0%	Neutral
UK	576,400	-2.8%	631,600	9.6%	Positive
Thailand	546,400	-4.0%	580,200	6.2%	Positive
China	459,900	8.4%	537,400	16.9%	Positive
Singapore	376,200	0.8%	411,500	9.4%	Positive
Japan	352,200	18.6%	399,800	13.5%	Positive
Fiji	347,600	-1.5%	346,900	-0.2%	Neutral
India	319,900	13.8%	357,500	11.8%	Positive
National Total	9,872,600	5.4%	10,549,900	6.9%	Positive



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

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

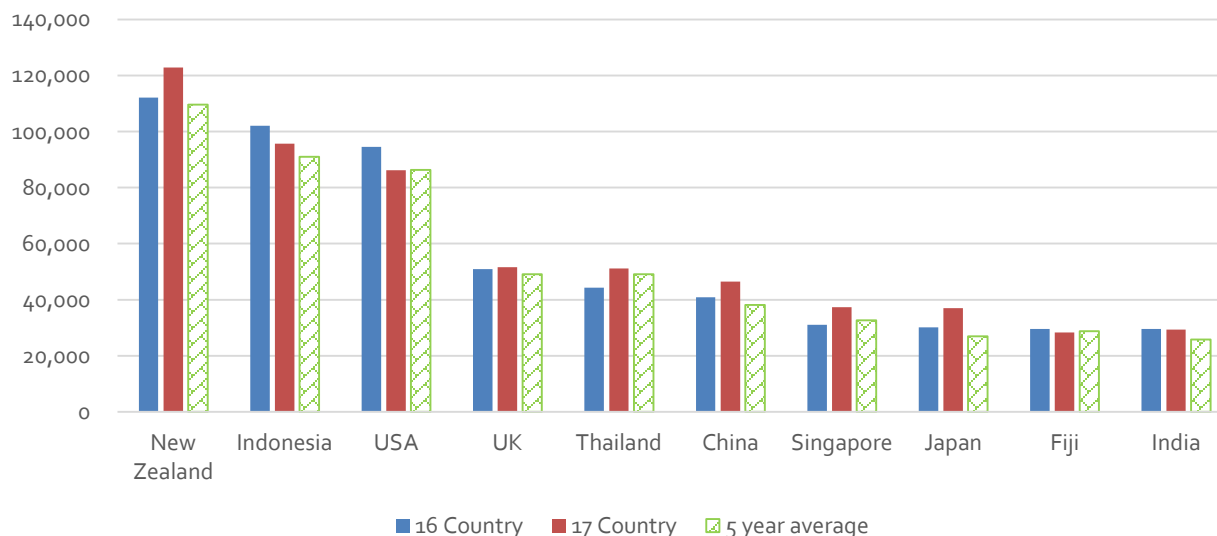
This section displays the performance of the major destinations Australian's are travelling to comparing November 2016 to November 2017

Key Highlights

Overall improvement in most markets. Where negative growth has occurred it is softer than the 2016 experience.

China is a standout performance tracking well above the 5 year average, up on average by 12% each year.

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	4.3%	122,800	Positive	9.5%
Indonesia	102,000	28.1%	95,700	Negative	-6.2%
USA	94,500	7.9%	86,200	Negative	-8.8%
UK	50,900	-11.0%	51,600	Neutral	1.4%
Thailand	44,300	-6.9%	51,200	Positive	15.6%
China	40,900	10.2%	46,500	Positive	13.7%
Singapore	31,100	-8.8%	37,300	Positive	19.9%
Japan	30,100	-0.3%	37,000	Positive	22.9%
Fiji	29,600	-3.0%	28,300	Negative	-4.4%
India	29,600	27.6%	29,400	Neutral	-0.7%
National Total	839,100	4.4%	892,000	Positive	6.3%

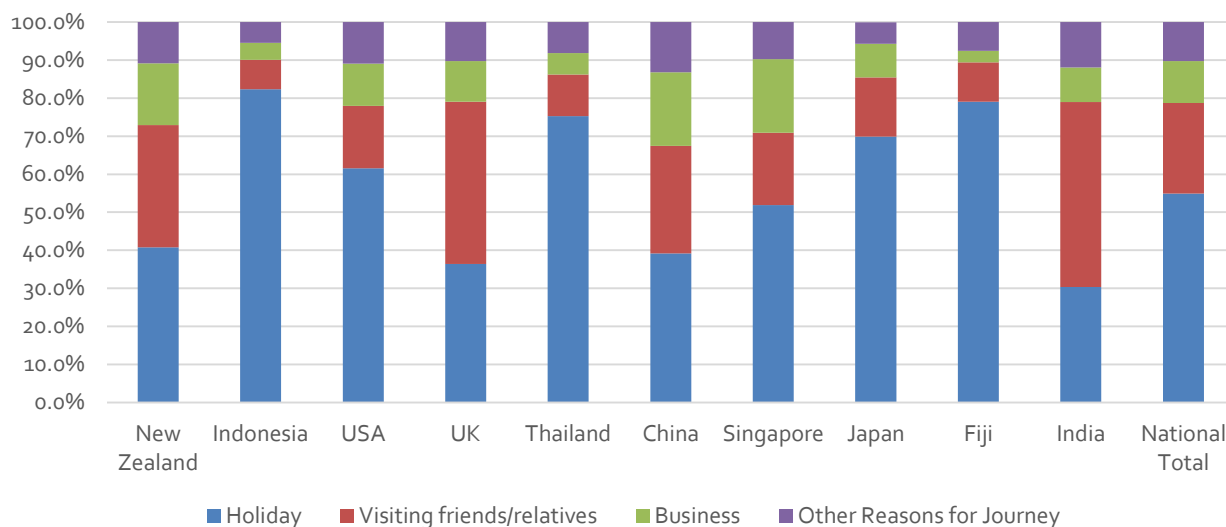


Source: November 2017 Short-term Movement, Residents Returning - Selected Destinations: Seasonally adjusted

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

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

	Holiday	Visiting friends/relatives	Business	Other Reasons for Journey
New Zealand	40.8%	32.1%	16.3%	10.8%
Indonesia	82.4%	7.7%	4.5%	5.4%
USA	61.6%	16.4%	11.1%	10.9%
UK	36.4%	42.7%	10.7%	10.3%
Thailand	75.3%	10.9%	5.7%	8.2%
China	39.2%	28.3%	19.3%	13.2%
Singapore	51.9%	19.1%	19.3%	9.8%
Japan	69.9%	15.5%	8.9%	5.7%
Fiji	79.1%	10.4%	3.0%	7.6%
India	30.3%	48.6%	9.1%	12.0%
National Total	54.9%	23.8%	11.0%	10.3%



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



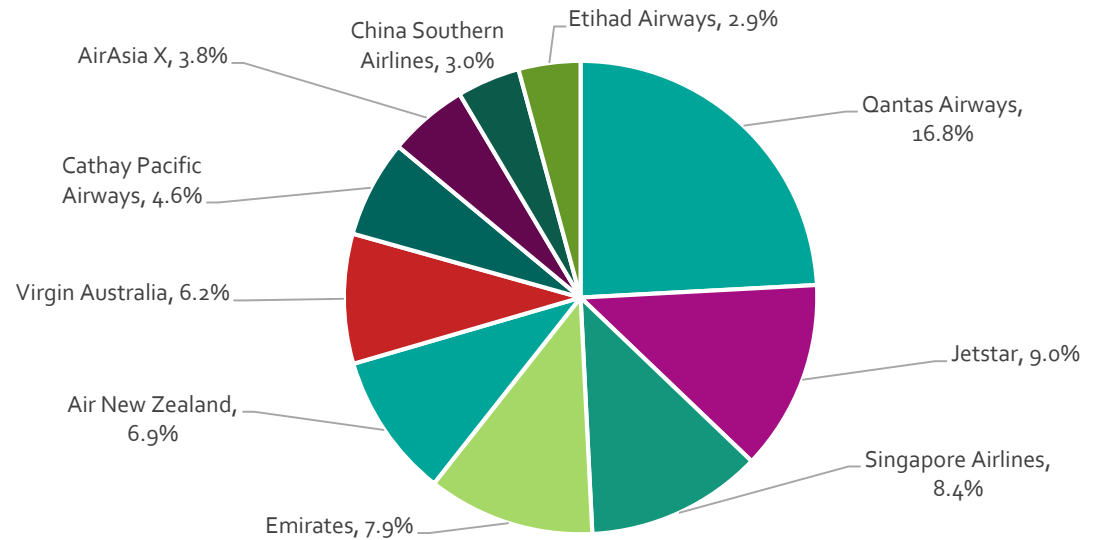
Source: International Airline Activity—Monthly Publications, October 2017

Airline activity - Month End October 2017

This snapshot displays the market share of each airline for international travel for the month of October 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	October -16	October -17
Qantas Airways	15.6%	16.8%
Jetstar	9.4%	9.0%
Singapore Airlines	8.1%	8.4%
Emirates	8.3%	7.9%
Air New Zealand	7.0%	6.9%
Virgin Australia	6.6%	6.2%
Cathay Pacific Airways	4.8%	4.6%
AirAsia X	4.1%	3.8%
China Southern Airlines	2.6%	3.0%
Etihad Airways	2.9%	2.9%



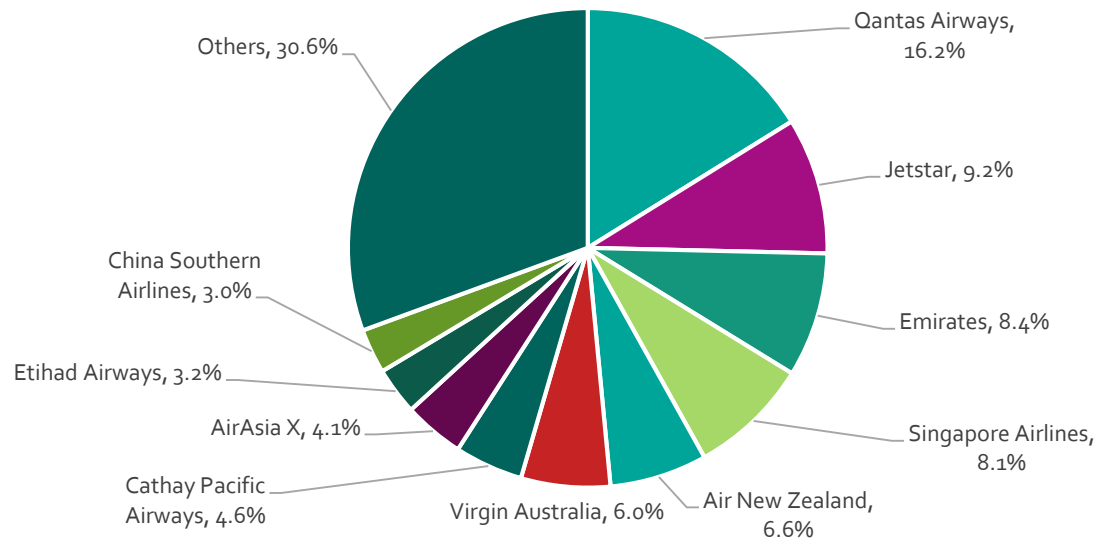
Source: International Airline Activity—Monthly Publications, October 2016 and October 2017

Airline activity – Year End October 2017

This snapshot displays the market share of each airline for international travel of Year end – October 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	October -16	Year End share of passengers carried	October - 17
Qantas Airways	15.8%	Qantas Airways	16.2%
Jetstar	9.5%	Jetstar	9.2%
Emirates	8.9%	Emirates	8.4%
Singapore Airlines	8.2%	Singapore Airlines	8.1%
Air New Zealand	6.8%	Air New Zealand	6.6%
Virgin Australia	6.5%	Virgin Australia	6.0%
Cathay Pacific Airways	4.9%	Cathay Pacific Airways	4.6%
AirAsia X	3.8%	AirAsia X	4.1%
Etihad Airways	3.1%	Etihad Airways	3.2%
China Southern Airlines	2.9%	China Southern Airlines	3.0%
Others	29.7%	Others	30.6%



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

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