

AFTA Travel Trends

February 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 December 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 December 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 December 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.

	December YE 2016 Total number of international visitors to Australia <i>Inbound</i>	December YE 2016 Total number of international trips by Australians <i>Outbound</i>	December YE 2017 Total number of international visitors to Australia <i>Inbound</i>	December YE 2017 Total number of international trips by Australians <i>Outbound</i>
China	1,220,000	465,300	1,382,800	538,300
New Zealand	1,338,200	1,342,200	1,355,300	1,423,900
UK	711,600	584,800	726,300	632,200
USA	717,400	1,076,100	783,600	1,076,100
Singapore	430,600	385,300	440,400	405,400
Japan	416,900	355,000	435,400	401,100
Malaysia	389,000	253,400	401,700	274,700
South Korea	281,600	72,000	302,200	71,800
India	262,700	320,800	302,900	365,100
Hong Kong	244,600	220,000	285,100	223,100
Indonesia	173,000	1,235,500	190,700	1,179,500
Thailand	91,000	546,200	97,700	583,200
Fiji	36,100	346,600	41,800	344,500
National Total	8,251,400	9,935,200	8,846,700	10,548,100

Source: December 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 – December 2017

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

Key Highlights

Growth softens to 7.2% in 2017, down by 3.5% on 2016.

The first quarter of 2017 provided the highest average growth of the year of 8.2%.

Month	Total number of travellers 2016	2016 Year end change	Total number of travellers 2017	2017 Year end change	2017 Performance
January	659,900	12.2%	710,200	7.6%	Positive
February	642,700	6.4%	716,500	11.5%	Positive
March	673,500	9.0%	710,600	5.5%	Positive
April	676,700	12.3%	746,700	10.3%	Positive
May	676,500	11.3%	733,400	8.4%	Positive
June	695,400	12.7%	727,800	4.7%	Positive
July	693,900	13.4%	745,300	7.4%	Positive
August	692,300	11.1%	758,100	9.5%	Positive
September	716,900	12.0%	743,800	3.8%	Positive
October	707,300	11.9%	756,300	6.9%	Positive
November	702,400	8.2%	755,300	7.5%	Positive
December	713,900	7.6%	742,700	4.0%	Positive
Total	8,251,400	10.7%	8,846,700	7.2%	Positive



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

Year end changes to top Australian source markets – December 2017

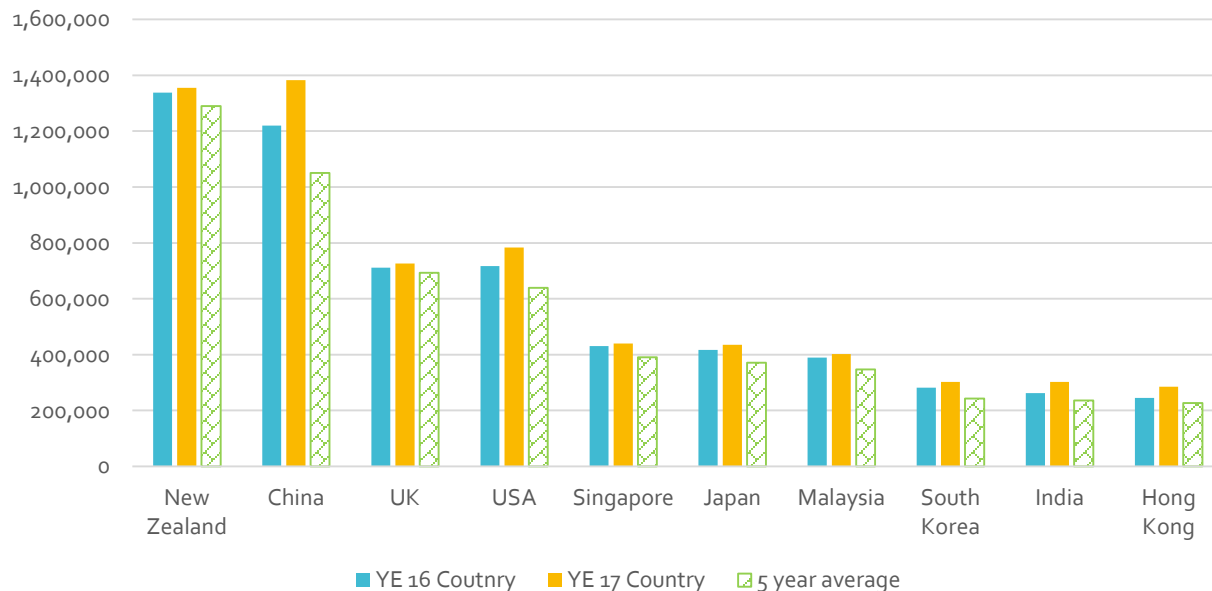
This section displays the performance of the major Australian source markets for international travellers as of December Year end 2016 and 2017.

Key Highlights

China finishes the year as Australia's largest source market with an average growth of nearly 15%.

Average growth for the 10 major source markets without China was 6.8%.

Destination	Total number of travellers 2016	2016 Year end change	Total number of travellers 2017	2017 Year end change	2017 Performance
New Zealand	1,338,200	2.2%	1,355,300	1.3%	Neutral
China	1,220,000	16.4%	1,382,800	13.3%	Positive
UK	711,600	3.4%	726,300	2.1%	Positive
USA	717,400	16.6%	783,600	9.2%	Positive
Singapore	430,600	11.8%	440,400	2.3%	Positive
Japan	416,900	21.7%	435,400	4.4%	Positive
Malaysia	389,000	14.0%	401,700	3.3%	Positive
South Korea	281,600	25.0%	302,200	7.3%	Positive
India	262,700	11.5%	302,900	15.3%	Positive
Hong Kong	244,600	11.2%	285,100	16.6%	Positive
National Total	8,251,400	10.7%	8,846,700	7.2%	Positive



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

Monthly changes to top Australian source markets – December 2017

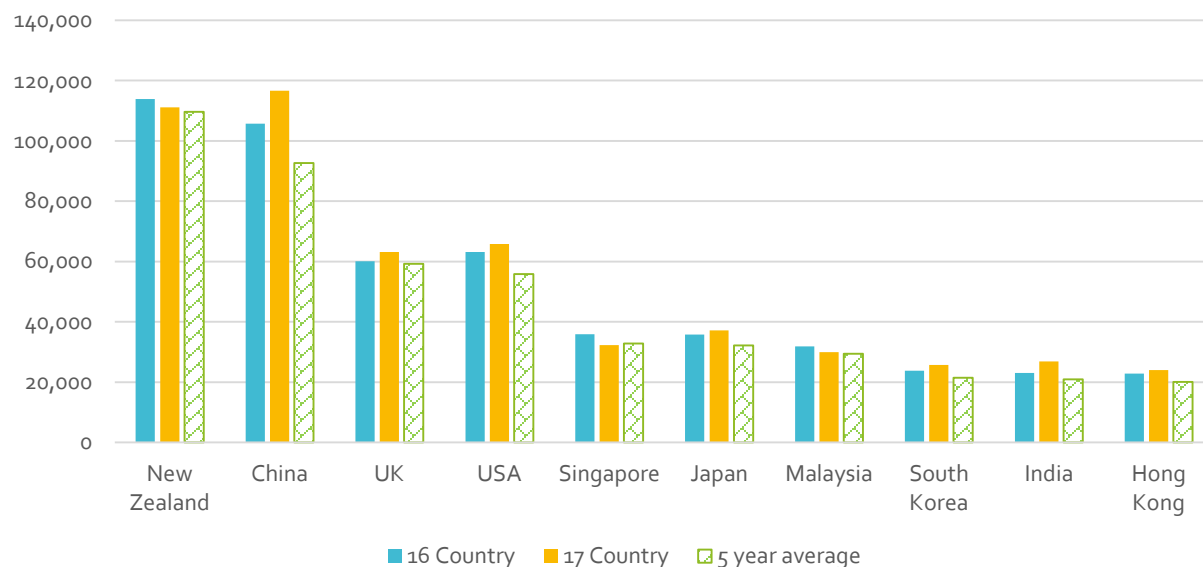
This section displays the performance of the major Australian source markets for international tourists comparing the month of December 2016 to December 2017.

Key Highlights

Singapore is the only major source market to drop below the 5 year average and is at its lowest point since 2014.

India up an average of 14% over the last 2 years.

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	2.9%	111,100	-2.5%	Negative
China	105,700	1.9%	116,600	10.3%	Positive
UK	60,100	2.2%	63,100	5.0%	Positive
USA	63,100	10.7%	65,800	4.3%	Positive
Singapore	35,900	5.3%	32,300	-10.0%	Negative
Japan	35,800	14.4%	37,100	3.6%	Positive
Malaysia	31,800	2.6%	29,900	-6.0%	Negative
South Korea	23,800	2.1%	25,700	8.0%	Positive
India	23,000	12.2%	26,800	16.5%	Positive
Hong Kong	22,800	16.9%	24,000	5.3%	Positive
National Total	713,900	7.6%	742,700	4.0%	Positive



Source: December 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 – December 2017

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

Key Highlights

The highest growth in the number of outbound movements by Australian's since 2013.

The second quarter had the highest growth of movements for the year at 8.3%.

Month	Total number of travellers 2016	2016 Year end change	Total number of travellers 2017	2017 Year end change	2017 Performance
December	808,200	3.8%	850,900	5.3%	Positive
January	793,300	5.9%	887,700	11.9%	Positive
February	807,500	3.5%	856,900	6.1%	Positive
March	816,300	4.9%	893,100	9.4%	Positive
April	814,900	4.9%	893,000	9.6%	Positive
May	823,700	4.8%	871,900	5.9%	Positive
June	834,500	8.3%	870,700	4.3%	Positive
July	836,900	4.9%	878,200	4.9%	Positive
August	842,100	6.3%	891,100	5.8%	Positive
September	839,100	6.2%	886,600	5.7%	Positive
October	839,400	4.6%	891,300	6.2%	Positive
November	879,300	7.8%	876,700	-0.3%	Neutral
Total	9,935,200	5.5%	10,548,100	6.2%	Positive



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

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

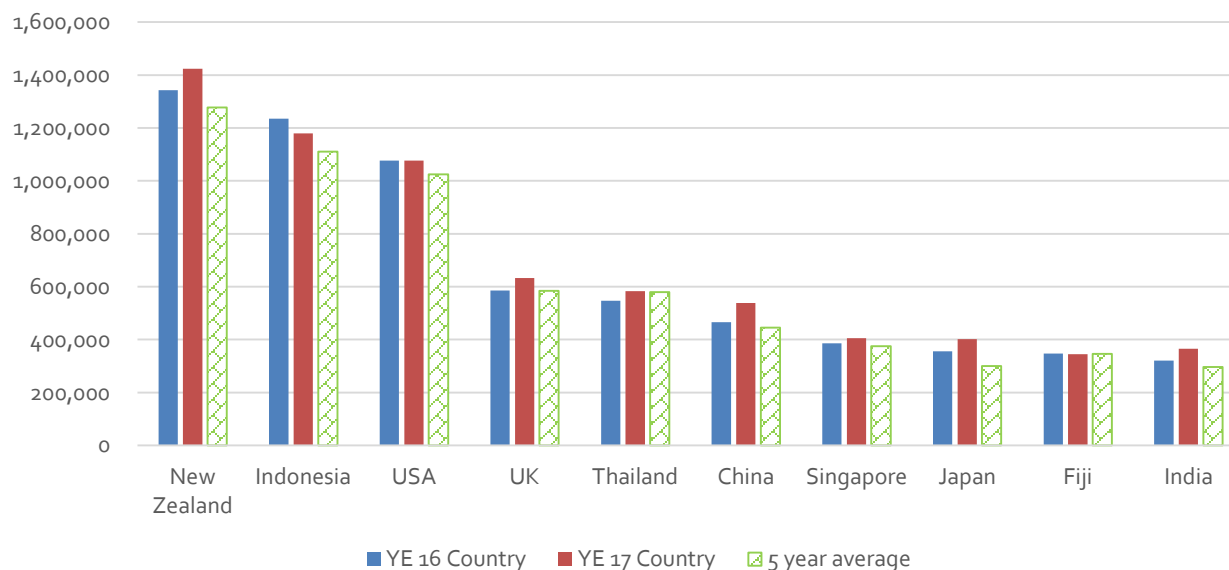
This section displays the performance of the major destinations Australian's are travelling to as of December Year end 2016 and 2017.

Key Highlights

Japan continues its renaissance with an average growth of 14% per year for the last two years.

Indonesia is still Australia's second most popular holiday destination growing by 8.1% 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	1,342,200	6.4%	1,423,900	6.1%	Positive
Indonesia	1,235,500	12.6%	1,179,500	-4.5%	Negative
USA	1,076,100	4.4%	1,076,100	0.0%	Neutral
UK	584,800	-1.0%	632,200	8.1%	Positive
Thailand	546,200	-4.0%	583,200	6.8%	Positive
China	465,300	9.4%	538,300	15.7%	Positive
Singapore	385,300	4.5%	405,400	5.2%	Positive
Japan	355,000	15.9%	401,100	13.0%	Positive
Fiji	346,600	-3.0%	344,500	-0.6%	Neutral
India	320,800	11.9%	365,100	13.8%	Positive
National Total	9,935,200	5.5%	10,548,100	6.2%	Positive



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

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

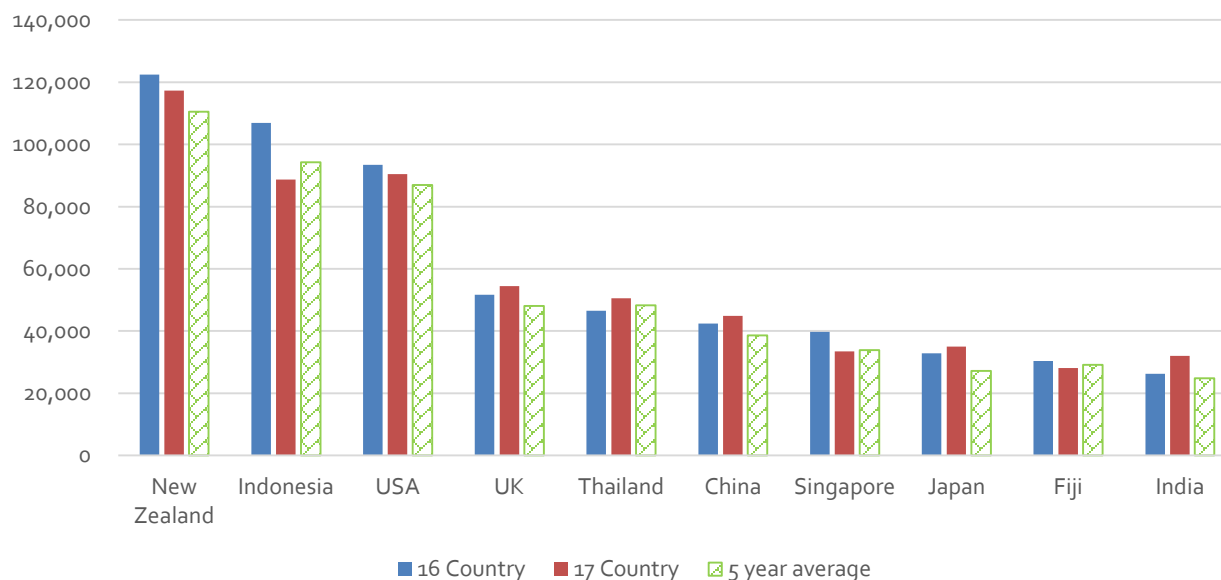
This section displays the performance of the major destinations Australian's are travelling to comparing December 2016 to December 2017

Key Highlights

The first time since May 2012, that a month end has not recorded any growth with the top 3 markets are recording negative growth.

USA takes second place behind New Zealand for the month.

Destination	Total number of travellers 2016	2016 Year end change	Total number of travellers 2017	2017 Year end change	2017 Performance
New Zealand	122,400	12.0%	117,300	-4.2%	Negative
Indonesia	106,900	8.4%	88,700	-17.0%	Negative
USA	93,400	7.4%	90,400	-3.2%	Negative
UK	51,700	20.8%	54,400	5.2%	Positive
Thailand	46,500	-0.6%	50,500	8.6%	Positive
China	42,400	13.7%	44,900	5.9%	Positive
Singapore	39,700	28.5%	33,400	-15.9%	Negative
Japan	32,800	9.0%	35,000	6.7%	Positive
Fiji	30,400	-3.5%	28,100	-7.6%	Negative
India	26,200	3.1%	32,000	22.1%	Positive
National Total	879,300	7.8%	876,700	-0.3%	Neutral

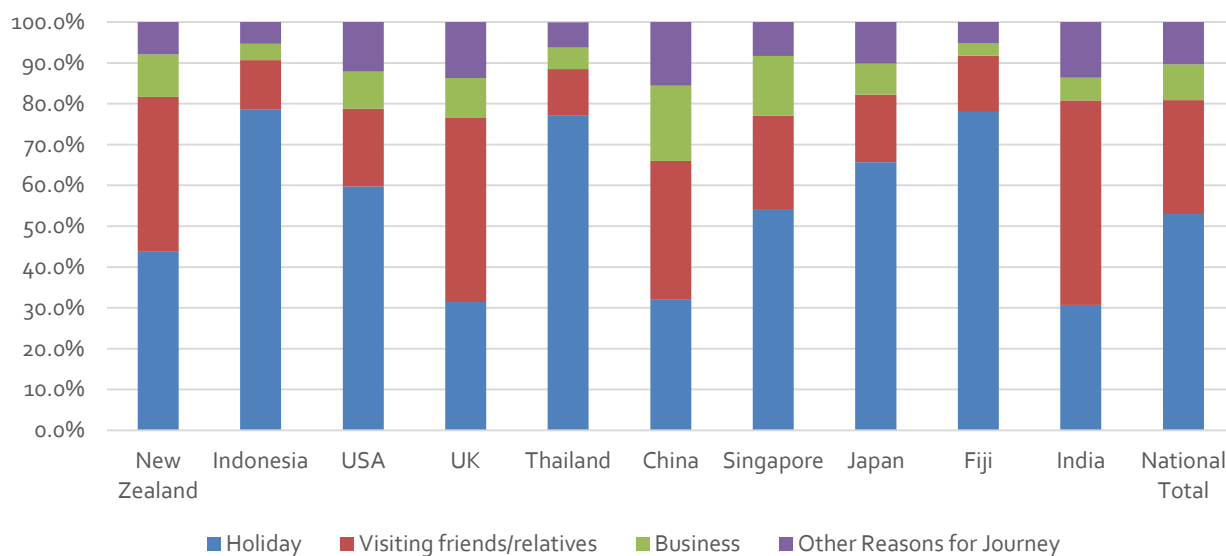


Source: December 2017 Short-term Movement, Residents Returning - Selected Destinations: Seasonally adjusted

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

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

	Holiday	Visiting friends/relatives	Business	Other Reasons for Journey
New Zealand	43.7%	38.0%	10.4%	7.9%
Indonesia	78.5%	12.2%	4.0%	5.3%
USA	59.7%	19.1%	9.1%	12.2%
UK	31.4%	45.2%	9.7%	13.7%
Thailand	77.0%	11.5%	5.3%	6.2%
China	31.9%	34.0%	18.5%	15.6%
Singapore	54.0%	23.0%	14.7%	8.3%
Japan	65.7%	16.5%	7.6%	10.2%
Fiji	78.0%	13.9%	3.0%	5.3%
India	30.7%	50.1%	5.6%	13.6%
National Total	53.0%	27.9%	8.8%	10.4%



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



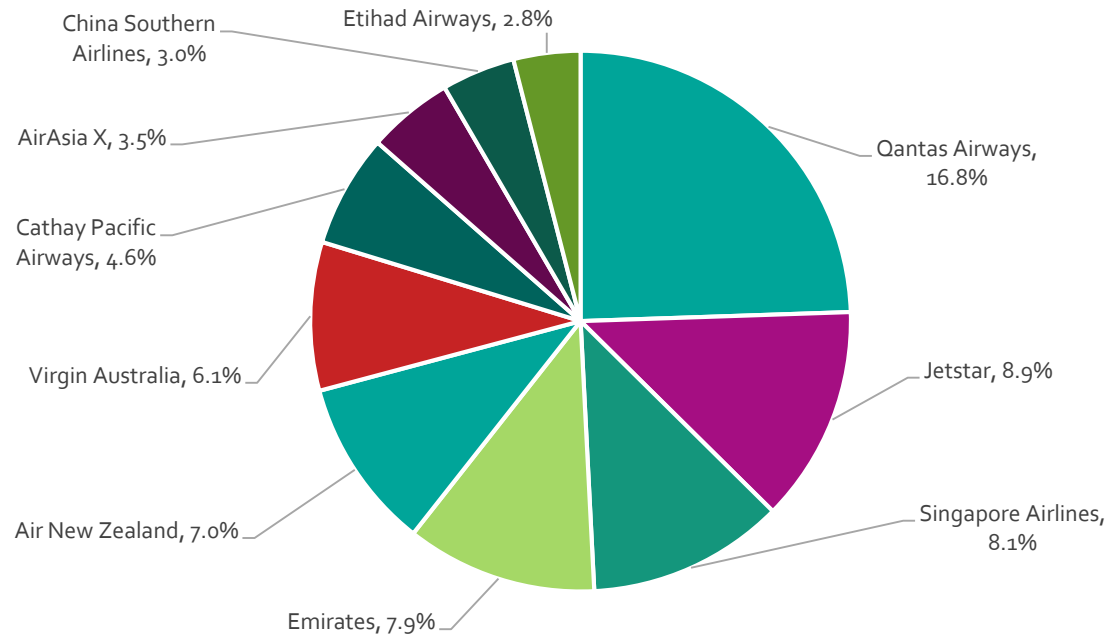
Source: International Airline Activity—Monthly Publications, October 2017

Airline activity - Month End November 2017

This snapshot displays the market share of each airline for international travel for the month of November 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	November -16	November -17
Qantas Airways	15.1%	16.8%
Jetstar	9.0%	8.9%
Singapore Airlines	8.0%	8.1%
Emirates	8.3%	7.9%
Air New Zealand	7.1%	7.0%
Virgin Australia	6.4%	6.1%
Cathay Pacific Airways	5.0%	4.6%
AirAsia X	4.2%	3.5%
China Southern Airlines	2.8%	3.0%
Etihad Airways	3.0%	2.8%



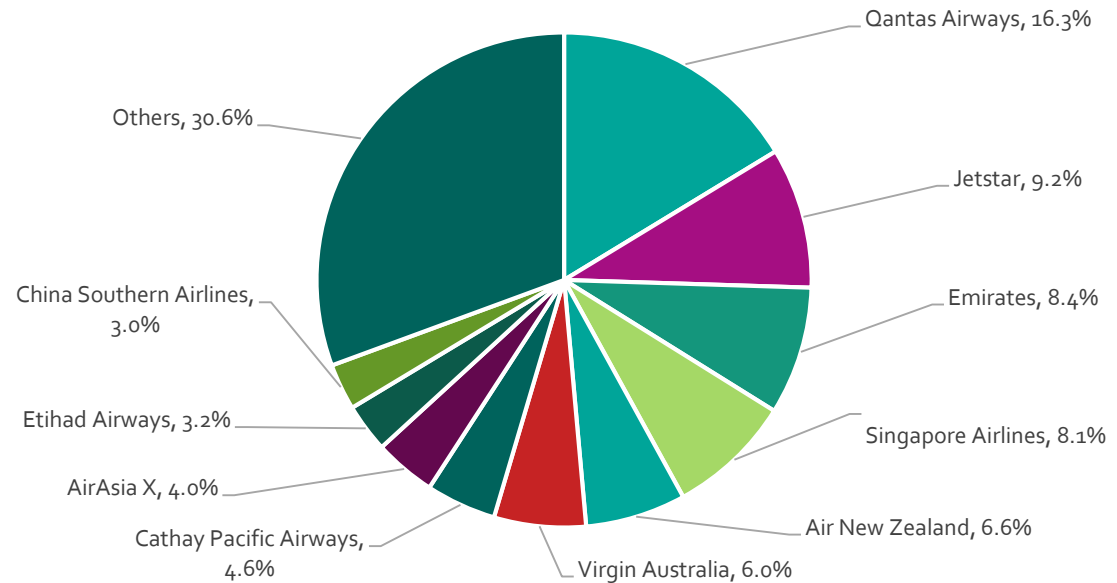
Source: International Airline Activity—Monthly Publications, November 2016 and November 2017

Airline activity – Year End November 2017

This snapshot displays the market share of each airline for international travel of Year end – November 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	November -16	Year End share of passengers carried	November - 17
Qantas Airways	15.7%	Qantas Airways	16.3%
Jetstar	9.5%	Jetstar	9.2%
Emirates	8.8%	Emirates	8.4%
Singapore Airlines	8.1%	Singapore Airlines	8.1%
Air New Zealand	6.8%	Air New Zealand	6.6%
Virgin Australia	6.4%	Virgin Australia	6.0%
Cathay Pacific Airways	4.9%	Cathay Pacific Airways	4.6%
AirAsia X	3.8%	AirAsia X	4.0%
Etihad Airways	3.1%	Etihad Airways	3.2%
China Southern Airlines	2.8%	China Southern Airlines	3.0%
Others	29.9%	Others	30.6%



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

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