

# Tourism 2020

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Whole of government working with industry to achieve Australia's tourism potential

## Mapping Australia's Aviation Markets - July 2012 Update

The Tourism Access Working Group (TAWG) was established under the National Long-Term Tourism Strategy. TAWG takes a comprehensive and integrated approach to recognising that the needs of the tourism industry are vital in the consideration of transport access and infrastructure planning.

TAWG draws on the practical experience of representatives across the tourism industry including airports, airlines and industry associations. It also brings together representatives from Commonwealth and state and territory governments who share responsibility for managing aviation and transport issues affecting the tourism industry. TAWG membership is listed on the last page of this document.

Tourism is a critical driver of aviation growth for Australia. As Australia receives 99 per cent of international visitors by air, the inbound tourism market relies heavily on effective and efficient air services. The *Mapping Australia's Aviation Markets* document is an audit and analysis of key inbound markets for Australia's tourism industry, concentrating on the negotiated capacity arrangements under existing Air Services Arrangements.

The *Mapping Australia's Aviation Markets* document builds on work undertaken by the TAWG's predecessor, the National Tourism and Aviation Advisory Committee and maps the Australian tourism industry's aviation access priorities, and will aid tourism's engagement in bilateral air services negotiations conducted by the Department of Infrastructure and Transport. It is also a valuable information source identifying: market specific traveller patterns and expenditure, the dominant airlines on the route (based on market share), the current seat utilisation on the route, and provides forecasts of market growth, all of which may be beneficial for informed decision making by the tourism industry.

The regular updating of this document will provide a comprehensive mapping of priorities for the short to medium term across key markets, while considering the strategic importance of hubs and the connectivity to mature and emerging markets hub carriers provide.

	<b>Canada</b>
<b>Overview <sup>1</sup></b>	Visitor arrivals from Canada were slightly lower (down 3 per cent) for 2011 with Australia receiving a total of 117,700 visitors, making Canada the thirteenth largest inbound market. The Total Inbound Economic Value (TIEV) of the Canadian market was \$572 million during this period, positioning the Canadian market spend thirteenth. Tourism Australia rates North America (including Canada) as a Category 1 market, expecting it to be worth over \$5 billion by 2020. <sup>2</sup>
	3.3 per cent inbound growth per year, reaching 165,000 arrivals (in 2020-21). No outbound forecast is available for this market.
<b>Major carriers</b>	Air Canada (34 per cent), Qantas (17 per cent).
<b>Ports serviced <sup>4</sup></b>	1 of the 8 international airports is serviced by direct flights (Sydney).
<b>Traveller information (2011)</b>	Canadian visitor arrivals were highest in January, July and September. 67 per cent of visitors travelled unaccompanied, with 51 per cent being repeat visitors. Average spend per trip was \$5,934 with an average length of stay of 40 nights, equating to an average spend per night of \$148.
<b>Total capacity entitlements <sup>5</sup></b>	Airlines of Canada – 3,000 seats per week. Airlines of Australia – 3,000 seats per week.
<b>Inbound load factors <sup>6</sup></b>	The reported passenger loads averaged 85 per cent for the 2011 year, peaking at 97 per cent for the month of January.
<b>Capacity utilisation <sup>7</sup></b>	Airlines of Australia – 0 per cent.
<b>Capacity and other issues <sup>8</sup></b>	Airlines of Canada – 63.0 per cent. Code share arrangements are available under this agreement. Intermediate rights for airlines of both countries are restricted (including at Los Angeles). The current capacity entitlement of 3,000 seats each way, each week would enable Air Canada to expand from a daily frequency to around 11 services per week based on the current aircraft type being used by the airline.

	<b>China</b>
<b>Overview <sup>1</sup></b>	The year 2011 saw a 19.4 per cent increase in visitors from China, reaching 542,000, and making China the third largest inbound market. China is Australia's largest market for Total Inbound Economic Value (TIEV), contributing \$3.48 billion during this period (a 15 per cent increase on the previous year). Tourism Australia rates Greater China (including Hong Kong) as a Category 1 market, expecting it to be worth over \$5 billion by 2020. <sup>2</sup>
	7.6 per cent inbound growth per year, reaching 1.04 million arrivals (in 2020-21). 5.8 per cent outbound growth per year, reaching 624,000 departures (in 2020-21).
<b>Major carriers</b>	China Southern (22 per cent), Cathay Pacific (16 per cent), China Eastern (14 per cent), Qantas (12 per cent). The above figures reflect visitor arrivals utilising ports such as Hong Kong for connections to Australian arrival cities.
<b>Ports serviced <sup>4</sup></b>	4 of the 8 international airports are serviced by direct flights (Perth, Brisbane, Melbourne, and Sydney).
<b>Traveller information (2011)</b>	Arrival numbers were highest in January and February and lower in June and July. 46 per cent of visitors travelled unaccompanied last year with 53 per cent being repeat visitors. Average spend per trip was \$7,333 with an average length of stay of 50 nights, equating to an average spend per night of \$147.
<b>Total capacity entitlements <sup>5</sup></b>	Airlines of China – 22,500 seats per week plus 2,500 seats per week through the Enhanced Regional Package Airlines of Australia – 22,500 seats per week plus 2,500 seats per week through the Enhanced Regional Package.
<b>Inbound load factors <sup>6</sup></b>	The reported passenger loads averaged 73 per cent for the 2011 year, peaking at 86 per cent for the month of January.
<b>Capacity utilisation <sup>7</sup></b>	Airlines of Australia - 18.8 per cent      Airlines of China – 66.7 per cent
<b>Capacity and other issues <sup>8</sup></b>	A significant range of intermediate and beyond rights are now available for both code share and own-operated services, with the Regional Package and Enhanced Regional Package available to airlines of both sides.

	France
<b>Overview</b> <sup>1</sup>	Visitor arrivals from France reached 94,000 during the 2011 which was down slightly on the previous year, making France the fourteenth largest inbound market. France's Total Inbound Economic Value (TIEV) increased by 7 per cent to \$488 million during the period, ranking it fifteenth in terms of TIEV for Australia. Tourism Australia rates France as a Category 4 <i>High Priority</i> market. <sup>2</sup>
	3.4 per cent inbound growth per year, reaching 132,000 arrivals (in 2020-21). No outbound forecast is available for this market.
<b>Major carriers</b>	Qantas (25 per cent), Emirates (15 per cent), Singapore Airlines (9 per cent).
<b>Ports serviced</b> <sup>4</sup>	All Australian ports are serviced indirectly.
<b>Traveller information (2011)</b>	Arrival numbers were higher in July and December and lower in May. 67 per cent of visitors travelled unaccompanied last year with 42 per cent being repeat visitors. Average spend per trip was \$6,435 with an average length of stay of 62 nights, equating to an average spend per night of \$104.
<b>Total capacity entitlements</b> <sup>5</sup>	Airlines of France – 3 units of capacity per week. 1 unit of capacity is equivalent to an aircraft of seat capacity 400 seats and above. Airlines of Australia – 3 units of capacity per week.
<b>Inbound load factors</b> <sup>6</sup>	No load factor data was available for this market.
<b>Capacity utilisation</b> <sup>7</sup>	Airlines of Australia – 0 per cent      Airlines of France – 60 per cent
<b>Capacity and other issues</b> <sup>8</sup>	Under the current air services agreement the number of services to/from metropolitan France in each direction is restricted to three per week, with restrictions also in place for intermediate and beyond rights. Code share services are subject to capacity restrictions. The air services agreement is outdated and in need of modernisation.

	<b>Germany</b>
<b>Overview <sup>1</sup></b>	Visitor arrivals from Germany were down 3.9 per cent during 2011 to 153,900, making Germany the tenth largest inbound market. The Total Inbound Economic Value (TIEV) was constant for the period at \$737 million, the tenth largest spend. Tourism Australia rates Germany as a Category 3 market, expecting it to be worth over \$1 billion by 2020. <sup>2</sup>
	2.0 per cent inbound growth per year, reaching 193,000 arrivals (in 2020-21). No outbound forecast is available for this market.
<b>Major carriers</b>	Qantas (28 per cent), Emirates (21 per cent), Singapore Airlines (10 per cent).
<b>Ports serviced <sup>4</sup></b>	All Australian ports are serviced indirectly. Although all Australian ports are serviced indirectly, some airlines operate services under the same flight number between Sydney to Germany via intermediate points.
<b>Traveller information (2011)</b>	Arrival numbers were higher in July and December and lower in May. 67 per cent of visitors travelled unaccompanied last year with 43 per cent being repeat visitors. Average spend per trip was \$6,096 with an average length of stay of 49 nights, equating to an average spend per night of \$124.
<b>Total capacity entitlements <sup>5</sup></b>	Airlines of Germany – 25 frequencies per week. Airlines of Australia – 25 frequencies per week.
<b>Inbound load factors <sup>6</sup></b>	The reported passenger loads averaged 90 per cent for the 2011 year, peaking at 99 per cent for the month of January.
<b>Capacity utilisation <sup>7</sup></b>	Airlines of Australia – 28.0 per cent      Airlines of Germany – 0 per cent
<b>Capacity and other issues <sup>8</sup></b>	No constraints currently identified.

	<b>Hong Kong</b>
<b>Overview</b> <sup>1</sup>	Visitors from Hong Kong increased by 1.5 per cent during 2011 to 166,300, making Hong Kong the ninth largest inbound market for Australia. The Total Inbound Economic Value (TIEV) was steady at \$718 million, ranking the Hong Kong market eleventh based on value. Tourism Australia rates Greater China (including Hong Kong) as a Category 1 market, expecting it to be worth over \$5 billion by 2020. <sup>2</sup>
	2.3 per cent inbound growth per year, reaching 214,000 arrivals (in 2020-21). 2.4 per cent outbound growth per year, reaching 283,000 departures (in 2020-21).
<b>Major carriers</b>	Cathay Pacific (56 per cent), Qantas (24 per cent).
<b>Ports serviced</b> <sup>4</sup>	6 of the 8 international airports are serviced by direct flights (Perth, Adelaide, Cairns, Brisbane, Melbourne, and Sydney).
<b>Traveller information (2011)</b>	Arrival numbers were higher in February, March, July, and December and reached a low in May. 64 per cent of visitors travelled unaccompanied last year with 73 per cent being repeat visitors. Average spend per trip was \$5,358 with an average length of stay of 36 nights, equating to an average spend per night of \$149.
<b>Total capacity entitlements</b> <sup>5</sup>	Airlines of Hong Kong – 70 frequencies per week. Airlines of Australia – 70 frequencies per week.
<b>Inbound load factors</b> <sup>6</sup>	The reported passenger loads averaged 77 per cent for the 2011 year, peaking at 93 per cent for the months of January and July.
<b>Capacity utilisation</b> <sup>7</sup>	Airlines of Australia – 35.7 per cent      Airlines of Hong Kong – 100 per cent
<b>Capacity and other issues</b> <sup>8</sup>	The Hong Kong side has exhausted its available capacity on this route. The current air services agreement provides airlines of Hong Kong with access to the regional package. Code share arrangements are available. The arrangements are amongst the most restrictive of all of Australia's air services arrangements, with significant traffic rights restrictions and unnecessarily complex rules on tariff approvals and other 'doing business' issues.

	<b>India</b>
<b>Overview <sup>1</sup></b>	India was Australia's eleventh largest inbound market with Australia receiving a total of 148,200 visitors during 2011, an increase of 6.8 per cent. The Indian market was ninth (by value) with a Total Inbound Economic Value (TIEV) of \$906 million in 2011. Tourism Australia rates India as a Category 3 market, expecting it to be worth over \$1 billion by 2020. <sup>2</sup>
	7.2 per cent inbound growth per year, reaching 290,000 arrivals (in 2020-21). No outbound forecast is available for this market.
<b>Major carriers</b>	Singapore Airlines (31 per cent), Malaysia Airlines (20 per cent), Qantas (17 per cent).
<b>Ports serviced <sup>4</sup></b>	All Australian ports are currently serviced indirectly.
<b>Traveller information (2011)</b>	Indian arrival numbers were higher in April to June, constant across the other months of 2011. In the 2011 December quarter, 52 per cent being repeat visitors. Average spend per trip was \$6,033 with an average length of stay of 68 nights, equating to an average spend per night of \$89.
<b>Total capacity entitlements <sup>5</sup></b>	Airlines of India – 6,500 seats per week. Airlines of Australia – 6,500 seats per week.
<b>Inbound load factors <sup>6</sup></b>	The reported passenger loads averaged 86.1 per cent for the 2011 year.
<b>Capacity utilisation <sup>7</sup></b>	Airlines of Australia – 0.0 per cent      Airlines of India – 0.0 per cent
<b>Capacity and other issues <sup>8</sup></b>	No constraints currently identified.

	<b>Indonesia</b>
<b>Overview</b> <sup>1</sup>	Indonesian arrivals totalled 140,400 during 2011, Australia's twelfth largest inbound market. The Total Inbound Economic Value (TIEV) increased 18 per cent to \$647 million during the period, twelfth in TIEV terms. Tourism Australia rates Indonesia as a Category 3 market, expecting it to be worth over \$1 billion by 2020. <sup>2</sup>
	7.0 per cent inbound growth per year, reaching 261,000 arrivals (in 2020-21). 5.0 per cent outbound growth per year, reaching 1.31 million departures (in 2020-21).
<b>Major carriers</b>	Garuda Indonesia (43 per cent), Singapore Airlines (16 per cent), Qantas (16 per cent).
<b>Ports serviced</b> <sup>4</sup>	6 of the 8 international airports are serviced by direct flights (Perth, Adelaide, Darwin, Brisbane, Melbourne and Sydney)
<b>Traveller information (2011)</b>	Arrival numbers were higher in December. 59 per cent of visitors travelled unaccompanied last year with 74 per cent being repeat visitors. Average spend per trip was \$5,640 with an average length of stay of 38 nights, equating to an average spend per night of \$148.
<b>Total capacity entitlements</b> <sup>5</sup>	Airlines of Indonesia – 25,000 seats per week. Airlines of Australia – 25,000 seats per week.
<b>Inbound load factors</b> <sup>6</sup>	The reported passenger loads averaged 74 per cent for the 2011 year, peaking at 84 per cent for the months of January and October.
<b>Capacity utilisation</b> <sup>7</sup>	Airlines of Australia – 61 per cent      Airlines of Indonesia –60 per cent
<b>Capacity and other issues</b> <sup>8</sup>	Airlines of both countries are expected to fully utilise all of the available capacity under the current arrangements in coming years; all Australian capacity has been allocated by the IASC. There are restrictions on intermediate and beyond rights for Australian carriers.



	<b>Ireland</b>
<b>Overview <sup>1</sup></b>	Australia received a total of 58,700 visitors from Ireland during 2011, an increase of 10 per cent compared to the previous year, making Ireland Australia's eighteenth largest inbound market. The Total Inbound Economic Value (TIEV) increased 12 per cent to \$539 million during the period, fourteenth in TIEV rankings. Tourism Australia rates Ireland as a Category 4 market. <sup>2</sup>
	3.9 per cent inbound growth per year, reaching 77,000 arrivals (in 2020-21). No outbound forecast is available for this market.
<b>Major carriers</b>	Qantas (25 per cent), Etihad (19 per cent), Malaysia Airlines (14 per cent). Traffic from Ireland is mostly via ports in the United Kingdom, Germany, and the United Arab Emirates.
<b>Ports serviced <sup>4</sup></b>	All Australian ports are serviced indirectly.
<b>Traveller information (2011)</b>	Irish arrivals were highest in December through to March, lower during Australia's winter. 62 per cent of visitors travelled unaccompanied last year with 54 per cent being repeat visitors. Average spend per trip was \$6,702 with an average length of stay of 61 nights, equating to an average spend per night of \$110.
<b>Total capacity entitlements <sup>5</sup></b>	Airlines of Ireland – 7 frequencies per week. Airlines of Australia – 7 frequencies per week.
<b>Inbound load factors <sup>6</sup></b>	No inbound load data is available for this market.
<b>Capacity utilisation <sup>7</sup></b>	Airlines of Australia – 0 per cent                      Airlines of Ireland – 0 per cent
<b>Capacity and other issues <sup>8</sup></b>	Code share arrangements are available under this agreement. The current air services agreement of seven frequencies per week are not being utilised by either party.

	<b>Japan</b>
<b>Overview <sup>1</sup></b>	Japan was Australia's fifth largest source market for visitor numbers with 332,700 visitors during 2011, a 16.4 per cent decrease on the previous year. The Total Inbound Economic Value (TIEV) of the Japanese market was \$1.05 billion, Australia's seventh largest market for TIEV. Tourism Australia rates Japan as a Category 2 market, expecting it to be worth over \$3 billion by 2020. <sup>2</sup>
	0.4 per cent inbound growth per year, with 378,000 arrivals (in 2020-21). No outbound forecast is available for this market.
<b>Major carriers</b>	Jetstar (47 per cent), Qantas (16 per cent), JAL (13 per cent).
<b>Ports serviced <sup>4</sup></b>	4 of the 8 international airports are serviced by direct flights (Cairns, Gold Coast, and Sydney).
<b>Traveller information (2011)</b>	Japanese visitor arrivals were highest in January and February, lower in May and June. 35 per cent of visitors travelled unaccompanied last year with 45 per cent being repeat visitors. Average spend per trip was \$4,469 with an average length of stay of 25 nights, equating to an average spend per night of \$179.
<b>Total capacity entitlements <sup>5</sup></b>	Airlines of Japan – 79 units to/from Narita per week, 7 frequencies to/from Haneda per week, unrestricted capacity to/from all other Japanese airports. Airlines of Australia – 79 units to/from Narita per week, 7 frequencies to/from Haneda per week, unrestricted capacity to/from all other Japanese airports.
<b>Inbound load factors <sup>6</sup></b>	The reported passenger loads averaged 71 per cent for the 2011 year, peaking at 88 per cent for the month of January.
<b>Capacity utilisation <sup>7</sup></b>	Airlines of Australia – 48.7 per cent (Narita allocation) Airlines of Japan – 13.3 per cent (Narita allocation)
<b>Capacity and other issues <sup>8</sup></b>	The current air services agreement offers adequate capacity for each country.

	<b>Korea</b>
<b>Overview</b> <sup>1</sup>	Korean visitor numbers decreased during 2011, to 198,000, but Korea remained Australia's eighth largest inbound market. Korea was fifth for Total Inbound Economic Value (TIEV) with \$1.1 billion during this period, on par with the previous year. Tourism Australia rates Korea as a Category 3 market, expecting it to be worth over \$1 billion by 2020. <sup>2</sup>
	2.4 per cent inbound growth per year, reaching 258,000 arrivals (in 2020-21). No outbound forecast is available for this market.
<b>Major carriers</b>	Korean Air (34 per cent), Asiana Airlines (24 per cent)
<b>Ports serviced</b> <sup>4</sup>	3 of the 8 international airports are serviced by direct flights (Brisbane, Melbourne and Sydney)
<b>Traveller information (2011)</b>	Korean arrival numbers were higher in January and October, lower from March through June. 59 per cent of visitors travelled unaccompanied last year with 67 per cent being first time visitors. Average spend per trip was \$7,010 with an average length of stay of 68 nights, equating to an average spend per night of \$103.
<b>Total capacity entitlements</b> <sup>5</sup>	Airlines of Korea – 9,500 seats per week. Airlines of Australia – 9,500 seats per week.
<b>Inbound load factors</b> <sup>6</sup>	The reported passenger loads averaged 71 per cent for the 2011 year, peaking at 89 per cent for the month of January.
<b>Capacity utilisation</b> <sup>7</sup>	Airlines of Australia – 0 per cent                      Airlines of Korea – 68.0 per cent Airlines of Australia schedule seasonal services to/from Korea.
<b>Capacity and other issues</b> <sup>8</sup>	Intermediate and beyond rights are very restricted.

	<b>Malaysia</b>
<b>Overview</b> <sup>1</sup>	Malaysia is Australia's seventh largest market for inbound visitors. Australia received a total of 241,200 visitors from Malaysia during 2011, an increase of 1.8 per cent compared to the previous year. The Total Inbound Economic Value (TIEV) was \$915 million for the year, taking Malaysia to eighth in TIEV spend. Tourism Australia rates Malaysia as a Category 2 market, expecting it to be worth over \$3 billion by 2020. <sup>2</sup>
	2.7 per cent inbound growth per year, reaching 319,000 arrivals (in 2020-21). 3.7 per cent outbound growth per year, reaching 368,000 departures (in 2020-21).
<b>Major carriers</b>	AirAsia X (42 per cent), Malaysia Airlines (35 per cent)
<b>Ports serviced</b> <sup>4</sup>	6 of the 8 international airports are serviced by direct flights (Perth, Adelaide, Gold Coast, Brisbane, Melbourne, and Sydney)
<b>Traveller information (2011)</b>	Malaysian arrival numbers were higher in January, February and July, lower in May, and June. 51 per cent of visitors travelled unaccompanied last year with 72 per cent being repeat visitors. Average spend per trip was \$4,687 with an average length of stay of 31 nights, equating to an average spend per night of \$151.
<b>Total capacity entitlements</b> <sup>5</sup>	Airlines of Malaysia – 23,500 seats per week. Airlines of Australia – 29,100 seats per week.
<b>Inbound load factors</b> <sup>6</sup>	The reported passenger loads averaged 79 per cent for the 2011 year, peaking at 91 per cent for the month of January.
<b>Capacity utilisation</b> <sup>7</sup>	Airlines of Australia – 0 per cent                      Airlines of Malaysia – 87.7 per cent
<b>Capacity and other issues</b> <sup>8</sup>	Malaysian carriers are using a significant amount of the available capacity. The regional package includes Avalon under this agreement.

	<b>New Zealand</b>
<b>Overview <sup>1</sup></b>	New Zealand is Australia's largest source market for visitors with 1,172,700 arrivals during 2011. The Total Inbound Economic Value (TIEV) was constant during this period at \$1.98 billion, making New Zealand third in terms of TIEV spend. Tourism Australia rates New Zealand as a Category 2 market, expecting it to be worth over \$3 billion by 2020. <sup>2</sup>
	1.8 per cent inbound growth per year, reaching 1.41 million arrivals (in 2020-21). 3.1 per cent outbound growth per year, reaching 1.43 million departures (in 2020-21).
<b>Major carriers</b>	Air New Zealand (50 per cent), Qantas (15 per cent), Virgin Australia (14 per cent), Jetstar (9 per cent).
<b>Ports serviced <sup>4</sup></b>	7 of the 8 international airports are serviced by direct flights (Perth, Adelaide, Cairns, Gold Coast, Brisbane, Melbourne, and Sydney).
<b>Traveller information (2011)</b>	New Zealand arrival numbers were higher over the new year period. 61 per cent of visitors travelled unaccompanied last year with 94 per cent being repeat visitors. Average spend per trip was \$2,017 with an average length of stay of 14 nights, equating to an average spend per night of \$144.
<b>Total capacity entitlements <sup>5</sup></b>	No restriction on capacity.
<b>Inbound load factors <sup>6</sup></b>	The reported passenger loads averaged 73 per cent for the 2011 year, peaking at 84 per cent for the month of January.
<b>Capacity utilisation <sup>7</sup></b>	Open capacity.
<b>Capacity and other issues <sup>8</sup></b>	No constraints currently identified.

	<b>Qatar</b>
<b>Overview</b> <sup>1</sup>	Qatar was Australia's fifty-seventh largest source market for visitors in 2011. Australia received a total of 5,200 visitors from Qatar last year. The Total Inbound Economic Value (TIEV) of the Middle East and North Africa market (including Qatar) was \$388 million for the 2011-12 financial year, 24 per cent down on the previous financial year. Tourism Australia rates the Middle East (including Qatar) as a Category 3 market, expecting it to be worth over \$1 billion by 2020. <sup>2</sup>
	6.0 per cent inbound growth per year, reaching 205,000 arrivals (in 2020-21) (Middle East and North Africa market, including Qatar). No outbound forecast is available for this market.
<b>Major carriers</b>	Qatar Airways (55 per cent), Emirates (24 per cent).
<b>Ports serviced</b> <sup>4</sup>	2 of the 8 international airports are serviced by direct flights (Perth and Melbourne). (Note: Perth services commenced on 3 July).
<b>Traveller information (2011)</b>	No traveller information data was available for this market.
<b>Total capacity entitlements</b> <sup>5</sup>	Airlines of Qatar – 14 frequencies per week. Airlines of Australia – 14 frequencies per week.
<b>Inbound load factors</b> <sup>6</sup>	No inbound load factor data was available for this market.
<b>Capacity utilisation</b> <sup>7</sup>	Airlines of Australia – 0 per cent                      Airlines of Qatar – 71.4 per cent
<b>Capacity and other issues</b> <sup>8</sup>	Perth services are planned to increase to daily by the end of the year utilising all of Qatar's capacity.

	<b>Singapore</b>
<b>Overview <sup>1</sup></b>	Singapore is Australia's largest source market from South East Asia and Australia's sixth largest inbound market. Australia received a total of 318,500 visitors from Singapore during 2011, an increase of 3.4 per cent compared to the previous year. The Total Inbound Economic Value (TIEV) for the period was \$1.08 billion for the year, sixth in terms of TIEV spend. Tourism Australia rates Singapore as a Category 2 market, expecting it to be worth over \$3 billion by 2020. <sup>2</sup>
	2.7 per cent inbound growth per year, reaching 413,000 arrivals (in 2020-21). 4.9 per cent outbound growth per year, reaching 444,000 departures (in 2020-21).
<b>Major carriers by market share</b>	Singapore Airlines (57 per cent), Qantas (20 per cent), Emirates (8 per cent).
<b>Ports serviced <sup>4</sup></b>	7 of the 8 international airports are serviced by direct flights (Perth, Adelaide, Darwin, Brisbane, Gold Coast, Melbourne, and Sydney).
<b>Traveller information (2011)</b>	Singaporean arrival numbers were higher in June, November, and December. 56 per cent of visitors travelled unaccompanied last year with 83 per cent being repeat visitors. Average spend per trip was \$4,530 with an average length of stay of 21 nights, equating to an average spend per night of \$216.
<b>Total capacity entitlements <sup>5</sup></b>	No restriction on capacity.
<b>Inbound load factors <sup>6</sup></b>	The reported passenger loads averaged 79 per cent for the 2011 year.
<b>Capacity utilisation <sup>7</sup></b>	Open capacity.
<b>Capacity and other issues <sup>8</sup></b>	Traffic rights for airlines of both sides are restricted, particularly beyond rights. Airlines of Singapore do not have access to the Pacific route.

	<b>South Africa</b>
<b>Overview</b> <sup>1</sup>	During 2011, total visitor arrivals from South Africa increased by 3.5 per cent to 64,400, making South Africa Australia's seventeenth inbound market. The Total Inbound Economic Value (TIEV) increased by over 10 per cent to \$335 million for the year, ranking South Africa eighteenth in TIEV terms. Tourism Australia rates South Africa as a Category 4 market. <sup>2</sup>
	5.1 per cent inbound growth per year, reaching 101,000 arrivals (in 2020-21). No outbound forecast is available for this market.
<b>Major carriers</b>	Qantas (42 per cent), South African Airways (29 per cent).
<b>Ports serviced</b> <sup>4</sup>	2 of the 8 international airports are serviced by direct flights (Perth and Sydney)
<b>Traveller information (2011)</b>	South African arrival numbers were higher in March, April, and December. 51 per cent of visitors travelled unaccompanied last year with 61 per cent being repeat visitors. Average spend per trip was \$3,609 with an average length of stay of 29 nights, equating to an average spend per night of \$124.
<b>Total capacity entitlements</b> <sup>5</sup>	Airlines of South Africa – 21 frequencies per week. Airlines of Australia – 21 frequencies per week.
<b>Inbound load factors</b> <sup>6</sup>	The reported passenger loads averaged 78 per cent for the 2011 year.
<b>Capacity utilisation</b> <sup>7</sup>	Airlines of Australia – 33.3 per cent      Airlines of South Africa – 28.6 per cent
<b>Capacity and other issues</b> <sup>8</sup>	No constraints currently identified.



	<b>Taiwan</b>
<b>Overview <sup>1</sup></b>	The 2011 year saw a 3 per cent decline in visitors from Taiwan, dropping to 84,500 for the year; the sixteenth largest inbound market. The Total Inbound Economic Value (TIEV) of the Taiwan market increased significantly to \$409 million, an increase of 12 per cent on 2010. Taiwan was ranked seventeenth for TIEV to Australia. Tourism Australia rates Taiwan as a Category 4 market. <sup>2</sup>
	4.5 per cent inbound growth per year, reaching 365,000 arrivals (in 2020-21) (Rest of Asia market, including Taiwan). No outbound forecast is available for this market.
<b>Major carriers</b>	China Airlines (45 per cent), Cathay Pacific (16 per cent), Eva Air (10 per cent).
<b>Ports serviced <sup>4</sup></b>	2 of the 8 international airports are serviced by direct flights (Brisbane and Sydney).
<b>Traveller information (2011)</b>	Taiwanese arrival numbers were higher in April and May. 48 per cent of visitors travelled unaccompanied last year with 57 per cent being first time visitors. Average spend per trip was \$4,722 with an average length of stay of 56 nights, equating to an average spend per night of \$84.
<b>Total capacity entitlements <sup>5</sup></b>	Airlines of Taiwan – 6,000 seats per week. Airlines of Australia – 6,000 seats per week.
<b>Inbound load factors <sup>6</sup></b>	The reported passenger loads averaged 74 per cent for the 2011 year.
<b>Capacity utilisation <sup>7</sup></b>	Airlines of Australia – 0 per cent                      Airlines of Taiwan – 44.2 per cent
<b>Capacity and other issues <sup>8</sup></b>	Code share frameworks limit marketing carrier activities.

	<b>Thailand</b>
<b>Overview</b> <sup>1</sup>	Thailand is ranked fifteenth among Australia's source markets in terms of arrivals. Australia received a total of 85,400 visitors from Thailand during 2011, an increase of 1.5 per cent compared to the previous year. The Total Inbound Economic Value (TIEV) was \$417 million for the financial year, sixteenth position in TIEV terms. Tourism Australia rates Thailand as a Category 4 market. <sup>2</sup>
	3.5 per cent inbound growth per year, reaching 123,000 arrivals (in 2020-21). 6.0 per cent outbound growth per year, reaching 869,000 departures (in 2020-21).
<b>Major carriers</b>	Thai Airways (39 per cent), Jetstar (14 per cent).
<b>Ports serviced</b> <sup>4</sup>	4 of the 8 international airports are serviced by direct flights (Perth, Brisbane, Melbourne, and Sydney).
<b>Traveller information (2011)</b>	Thai arrival numbers were higher in March and April, lower in January, June, and November. 72 per cent of visitors travelled unaccompanied last year with 67 per cent being repeat visitors. Average spend per trip was \$5,053 with an average length of stay of 48 nights, equating to an average spend per night of \$105.
<b>Total capacity entitlements</b> <sup>5</sup>	Airlines of Thailand – 45 units per week. 1 unit of capacity is equivalent to a Boeing 747 aircraft or 390 seats. Airlines of Australia – 45 units per week.
<b>Inbound load factors</b> <sup>6</sup>	The reported passenger loads averaged 67 per cent for the 2011 year.
<b>Capacity utilisation</b> <sup>7</sup>	Airlines of Australia – 31.3 per cent      Airlines of Thailand – 71.4 per cent
<b>Capacity and other issues</b> <sup>8</sup>	While there appears to be significant capacity available for Australian carriers, much of this 'capacity' is utilised to conduct third-country code share services as a result of the outdated capacity structure in the arrangements.

	<b>United Kingdom</b>
<b>Overview <sup>1</sup></b>	Visitor numbers from the United Kingdom (UK), Australia's second largest inbound market, were down 6 per cent for 2011, with 608,300 entering Australia. The UK is Australia's second largest market for Total Inbound Economic Value (TIEV) with visitors accounting for \$2.6 billion during for 2011. Tourism Australia rates the UK as a Category 1 market, expecting it to be worth over \$5 billion by 2020. <sup>2</sup>
	1.7 per cent inbound growth per year, reaching 747,000 arrivals (in 2020-21). 2.8 per cent outbound growth per year, reaching 628,000 departures (in 2020-21).
<b>Major carriers</b>	Qantas (27 per cent), Emirates (20 per cent), Singapore Airlines (11 percent), Cathay Pacific (6 per cent).
<b>Ports serviced <sup>4</sup></b>	All Australian ports are serviced indirectly. Although all Australian ports are serviced indirectly, some airlines operate services under the same flight number from Sydney and Melbourne to the United Kingdom via intermediate points.
<b>Traveller information (2011)</b>	UK arrival numbers were higher during Australia's summer, lower May through August. 57 per cent of visitors travelled unaccompanied last year with 61 per cent being repeat visitors. Average spend per trip was \$5,029 with an average length of stay of 36 nights, equating to an average spend per night of \$140.
<b>Total capacity entitlements <sup>5</sup></b>	No restriction on capacity.
<b>Inbound load factors <sup>6</sup></b>	The reported passenger loads averaged 80 per cent for the 2011 year.
<b>Capacity utilisation <sup>7</sup></b>	Open capacity.
<b>Capacity and other issues <sup>8</sup></b>	Traffic rights via China and the USA are restricted.

	<b>United Arab Emirates</b>									
<b>Overview</b> <sup>1</sup>	The United Arab Emirates (UAE) is Australia's twenty-third largest source market for visitors. Australia received a total of 45,000 visitors from the UAE during 2011. The Total Inbound Economic Value (TIEV) of the Middle East and North Africa market (including the UAE) was \$388 million for the 2011-12 financial year, 24 per cent down on the previous financial year. Tourism Australia rates the Middle East (including the UAE) as a Category 3 market, expecting it to be worth over \$1 billion by 2020. <sup>2</sup>									
	6.0 per cent inbound growth per year, reaching 205,000 arrivals (in 2020-21) (Middle East and North Africa market, including Qatar). No outbound forecast is available for this market.									
<b>Major carriers</b>	Emirates (61 per cent), Etihad (20 per cent).									
<b>Ports serviced</b> <sup>4</sup>	4 of the 8 international airports are serviced by direct flights (Perth, Brisbane, Melbourne and Sydney).									
<b>Traveller information (2011)</b>	No traveller information data was available for this market.									
<b>Total capacity entitlements</b> <sup>5</sup>	<p>Airlines of UAE –</p> <table border="0"> <tr> <td>Dubai carriers</td> <td>84 services per week</td> <td>(maximum of 21 services to any one point).</td> </tr> <tr> <td>Abu Dhabi carriers</td> <td>35 services per week</td> <td>(maximum of 14 services to any one point).</td> </tr> <tr> <td>Sharjah carriers</td> <td>7 services per week.</td> <td></td> </tr> </table> <p>Airlines of Australia – 126 services per week.</p>	Dubai carriers	84 services per week	(maximum of 21 services to any one point).	Abu Dhabi carriers	35 services per week	(maximum of 14 services to any one point).	Sharjah carriers	7 services per week.	
Dubai carriers	84 services per week	(maximum of 21 services to any one point).								
Abu Dhabi carriers	35 services per week	(maximum of 14 services to any one point).								
Sharjah carriers	7 services per week.									
<b>Inbound load factors</b> <sup>6</sup>	No inbound load factor data was available for this market.									
<b>Capacity utilisation</b> <sup>7</sup>	Airlines of Australia – 2.4 per cent      Airlines of the UAE – 83.3 per cent (Dubai), 60 per cent (Abu Dhabi)									
<b>Capacity and other issues</b> <sup>8</sup>	No constraints currently identified.									

	<b>United States of America</b>
<b>Overview <sup>1</sup></b>	The United States of America (USA) is Australia's fourth largest source market for visitors. Australia received a total of 456,200 visitors from the USA during 2011. The Total Inbound Economic Value (TIEV) of the US market was \$1.78 billion, up 6 per cent on the previous year, fourth in TIEV rankings. Tourism Australia rates North America (including the USA) as a Category 1 market, expecting it to be worth over \$5 billion by 2020. <sup>2</sup>
	3.1 per cent inbound growth per year, reaching 632,000 arrivals (in 2020-21). 4.6 per cent outbound growth per year, reaching 1.18 million departures (in 2020-21).
<b>Major carriers</b>	Qantas (38 per cent), United Airlines (19 per cent), Delta Airlines (9 per cent), Virgin Australia (8 per cent).
<b>Ports serviced <sup>4</sup></b>	3 of the 8 international airports are serviced by direct flights (Brisbane, Melbourne and Sydney).
<b>Traveller information (2011)</b>	USA arrival numbers were higher in January and October, lower in March and August. 64 per cent of visitors travelled unaccompanied last year with 45 per cent being repeat visitors. Average spend per trip was \$5,187 with an average length of stay of 24 nights, equating to an average spend per night of \$216.
<b>Total capacity entitlements <sup>5</sup></b>	No restriction on capacity.
<b>Inbound load factors <sup>6</sup></b>	The reported passenger loads averaged 84 per cent for the 2011 year, peaking at 96 per cent for the month of January.
<b>Capacity utilisation <sup>7</sup></b>	Open capacity.
<b>Capacity and other issues <sup>8</sup></b>	No constraints currently identified.

- 1 Source: Australian Bureau of Statistics, Overseas Arrivals and Departures, December 2011  
<http://www.abs.gov.au/ausstats/abs@.nsf/products/>  
and Tourism Research Australia, International Visitor Survey, December 2011  
[http://www.ret.gov.au/documents/tourism/tra/international/International\\_Visitors\\_Survey\\_December\\_Qtr\\_2011](http://www.ret.gov.au/documents/tourism/tra/international/International_Visitors_Survey_December_Qtr_2011)
- 2 Source: Tourism Australia Corporate Plan, 2012 – 2015.
- 3 Source: Tourism Forecasting Committee, Forecast, 2012 Issue 1, April 2012.  
Forecasts should only be used as a general guide to expected capacity requirements.
- 4 Calculated on non-stop, point to point services between this market and Australia.
- 5 Total capacity entitlements under existing bilateral arrangements available for both countries. If the negotiated capacity is expressed in frequencies, the data has been presented as frequencies and not converted into a seat projection to avoid skewed information.
- 6 Data obtained from the Bureau of Infrastructure, Transport and Regional Economics.  
Note: the inbound load factors do not distinguish between international visitors and Australian travellers returning home.
- 7 Estimates based on approved Northern Summer 2012 (March – October 2012) schedules.
- 8 Specific problem areas are identified on an exception basis – unless otherwise noted, existing arrangements include liberal code sharing arrangements, access to the regional package, reasonable route and traffic rights.

The Tourism Access Working Group is chaired by the Australian Government Ministers responsible for Tourism and Transport. Its membership is comprised of representatives from:

The Department of Infrastructure and Transport  
The Department of Resources, Energy and Tourism  
Tourism Australia  
Qantas Airways  
Virgin Australia  
Brisbane Airport Corporation  
Melbourne Airport  
Sydney Airport Corporation  
Westralia Airports Corporation  
Representatives of the Regional Airport Sub Committee  
Australian Capital Tourism  
South Australian Tourism Commission  
Tourism New South Wales  
Tourism Northern Territory  
Tourism Queensland  
Tourism Tasmania  
Tourism Victoria  
Tourism Western Australia  
The Australian Federation of Travel Agents Limited  
The Tourism and Transport Forum  
Australian Hotels Association  
Australian Airports Association  
National Tourism Alliance  
Australian Tourism Export Council  
Board of Airline Representatives of Australia