

AFTA Travel Trends

March 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 January 2018.

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 January 2018

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 January Year end 2017 and 2018.

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.

	January YE 2017 Total number of international visitors to Australia <i>Inbound</i>	January YE 2017 Total number of international trips by Australians <i>Outbound</i>	January YE 2018 Total number of international visitors to Australia <i>Inbound</i>	January YE 2018 Total number of international trips by Australians <i>Outbound</i>
China	1,225,600	472,500	1,379,300	540,900
New Zealand	1,338,000	1,350,800	1,355,100	1,421,900
USA	724,400	1,078,000	796,300	1,077,400
UK	713,300	590,600	730,600	636,300
Singapore	430,100	388,600	443,700	406,900
Japan	421,200	357,100	437,400	407,700
Malaysia	391,200	254,900	402,300	273,700
South Korea	285,800	72,700	302,600	72,700
India	264,400	324,500	310,400	370,400
Hong Kong	248,000	220,400	286,300	225,700
Indonesia	175,700	1,226,100	191,200	1,177,400
Thailand	91,400	544,700	99,200	586,900
Fiji	36,600	347,100	43,200	341,000
National Total	8,301,100	9,976,100	8,896,900	10,591,300

Source: January 2018 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 – January 2018

This section displays the number of international tourists travelling to Australia each month as of January Year end 2017 and 2018.

Key Highlights

An 8.9% average growth in movements for the month of January over the last 3 years.

Year end growth is still strong but has softened to 2015 levels.

Month	Total number of travellers 2017	2017 Year end change	Total number of travellers 2018	2018 Year end change	2018 Performance
February	643,200	6.5%	717,200	11.5%	Positive
March	674,000	9.0%	710,700	5.4%	Positive
April	675,400	12.0%	746,900	10.6%	Positive
May	677,100	11.5%	731,800	8.1%	Positive
June	695,800	12.8%	728,200	4.7%	Positive
July	693,700	13.4%	746,500	7.6%	Positive
August	690,700	10.7%	757,700	9.7%	Positive
September	718,000	12.3%	742,900	3.5%	Positive
October	707,600	11.9%	756,300	6.9%	Positive
November	700,800	7.9%	755,700	7.8%	Positive
December	714,600	7.7%	742,800	3.9%	Positive
January	710,200	7.8%	760,200	7.0%	Positive
Total	8,301,100	10.3%	8,896,900	7.2%	Positive



Source: January 2018 Short-term Movement, Visitor Arrivals - Selected Countries of Residence: Seasonally adjusted

Year end changes to top Australian source markets – January 2018

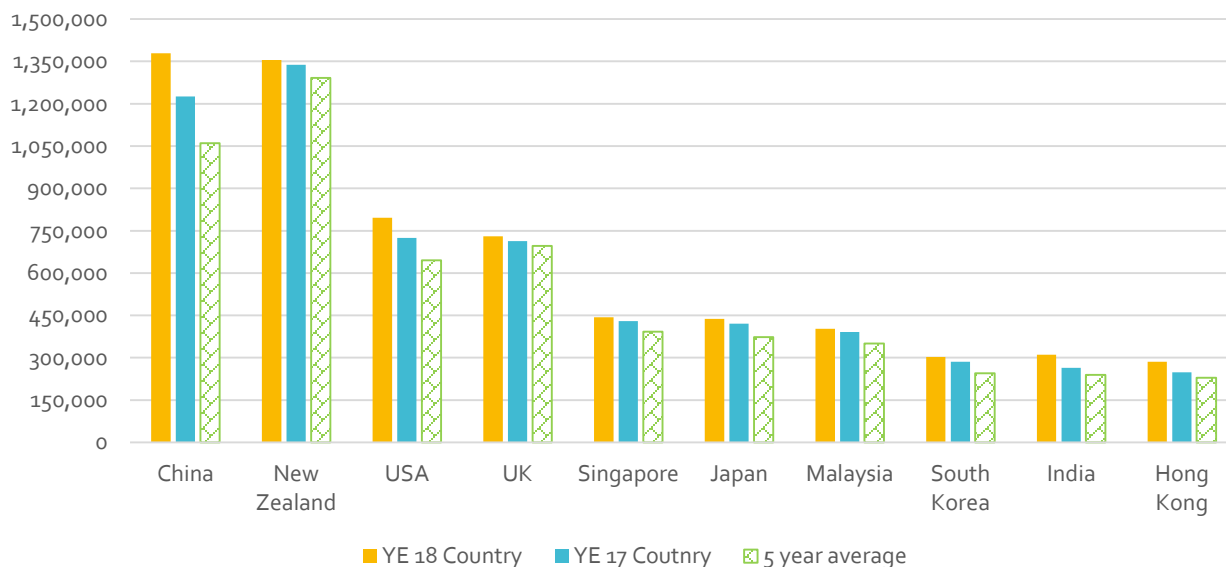
This section displays the performance of the major Australian source markets for international travellers as of January Year end 2017 and 2018.

Key Highlights

Asian source markets dominate with an average growth of 8.7%.

All markets are trending above the 5 year average.

Destination	Total number of travellers 2017	2017 Year end change	Total number of travellers 2018	2018 Year end change	2018 Performance
China	1,225,600	13.1%	1,379,300	12.5%	Positive
New Zealand	1,338,000	1.5%	1,355,100	1.3%	Neutral
USA	724,400	16.3%	796,300	9.9%	Positive
UK	713,300	3.6%	730,600	2.4%	Positive
Singapore	430,100	10.6%	443,700	3.2%	Positive
Japan	421,200	21.1%	437,400	3.8%	Positive
Malaysia	391,200	14.2%	402,300	2.8%	Positive
South Korea	285,800	25.4%	302,600	5.9%	Positive
India	264,400	11.8%	310,400	17.4%	Positive
Hong Kong	248,000	11.5%	286,300	15.4%	Positive
National Total	8,301,100	10.3%	8,896,900	7.2%	Positive



Source: January 2018 Short-term Movement, Visitor Arrivals - Selected Countries of Residence: Seasonally adjusted

Monthly changes to top Australian source markets – January 2018

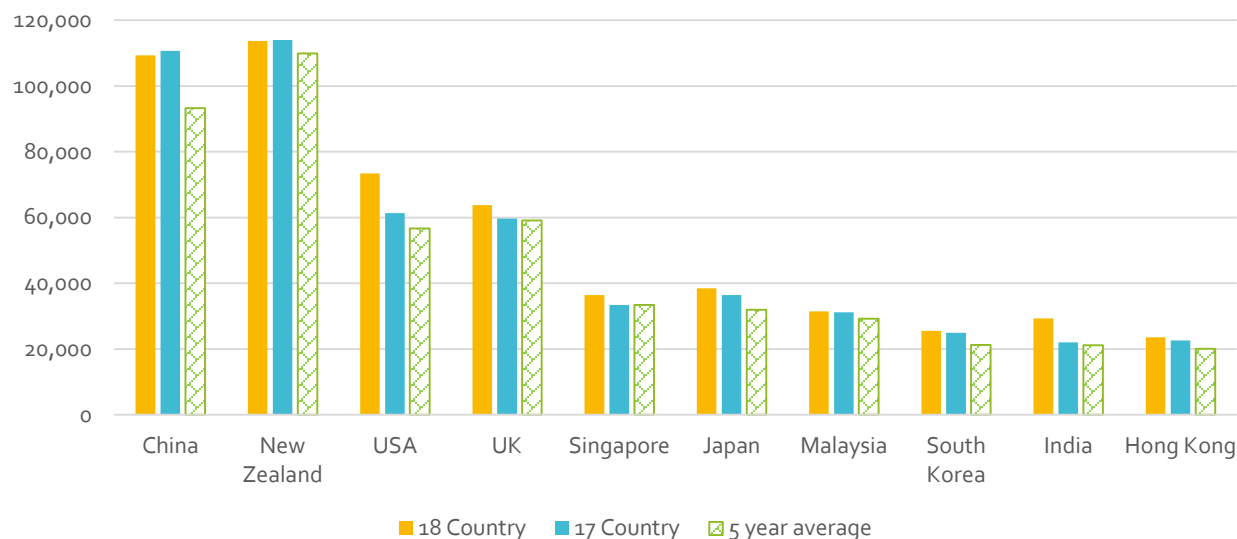
This section displays the performance of the major Australian source markets for international tourists comparing the month of January 2017 to January 2018.

Key Highlights

NZ keeps the title of largest source market for January, with growth from China retreating by 1.3%.

USA has now beaten the UK two consecutive years in a row to be Australia's third largest source market.

Destination	Total number of travellers 2017	2017 Year end change	Total number of travellers 2018	2018 Year end change	2018 Performance
China	110,700	6.6%	109,300	-1.3%	Neutral
New Zealand	114,000	-0.1%	113,700	-0.3%	Neutral
USA	61,300	12.5%	73,400	19.7%	Positive
UK	59,700	2.8%	63,800	6.9%	Positive
Singapore	33,400	-1.8%	36,400	9.0%	Positive
Japan	36,400	13.4%	38,500	5.8%	Positive
Malaysia	31,200	8.3%	31,400	0.6%	Neutral
South Korea	24,900	20.9%	25,500	2.4%	Positive
India	22,000	8.4%	29,300	33.2%	Positive
Hong Kong	22,600	16.5%	23,600	4.4%	Positive
National Total	710,200	7.8%	760,200	7.0%	Positive



Source: January 2018 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 – January 2018

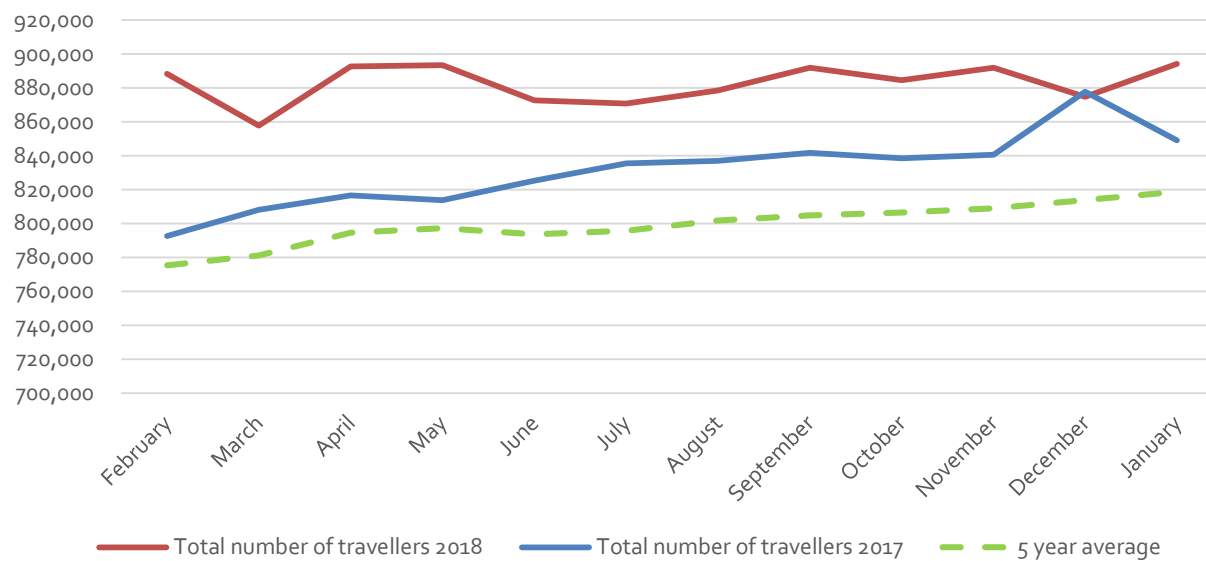
This section displays the number of Australians travelling outbound each month as of January Year end 2017 and 2018.

Key Highlights

Outbound movements for month end return to growth up 5.3% in 2018.

End of year movements up 0.6% to 6.2% to the highest levels since 2013.

Month	Total number of travellers 2017	2017 Year end change	Total number of travellers 2018	2018 Year end change	2018 Performance
February	792,700	5.7%	888,400	12.1%	Positive
March	808,000	3.8%	857,700	6.2%	Positive
April	816,600	4.9%	892,600	9.3%	Positive
May	813,700	4.7%	893,400	9.8%	Positive
June	825,200	5.0%	872,600	5.7%	Positive
July	835,500	8.3%	870,800	4.2%	Positive
August	836,900	5.0%	878,500	5.0%	Positive
September	841,600	6.1%	891,900	6.0%	Positive
October	838,500	6.0%	884,600	5.5%	Positive
November	840,500	5.0%	891,900	6.1%	Positive
December	877,800	7.7%	874,800	-0.3%	Neutral
January	849,100	5.0%	894,100	5.3%	Neutral
Total	9,976,100	5.6%	10,591,300	6.2%	Positive



Source: January 2018 Short-term Movement, Residents Returning - Selected Destinations: Seasonally adjusted

Year end changes to popular international destinations travelled to by Australian's – January 2018

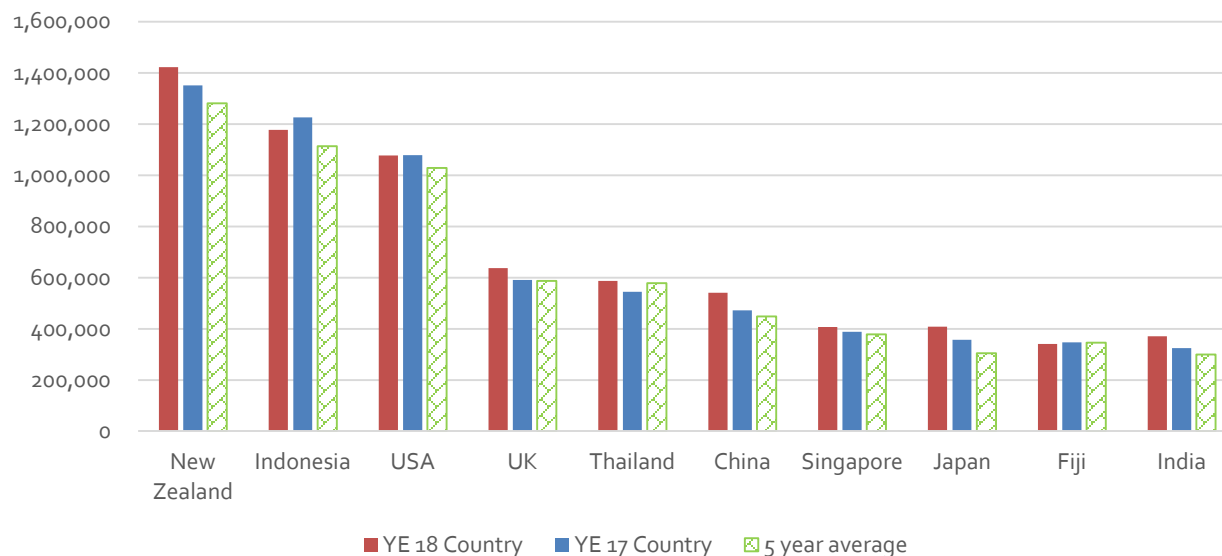
This section displays the performance of the major destinations Australian's are travelling to as of January Year end 2017 and 2018.

Key Highlights

7 of the 10 major source markets achieve an average growth of 9.7%.

Since 2013, the UK have added 100,000 movements.

Destination	Total number of travellers 2017	2017 Year end change	Total number of travellers 2018	2018 Year end change	2018 Performance
New Zealand	1,350,800	6.9%	1,421,900	5.3%	Positive
Indonesia	1,226,100	10.9%	1,177,400	-4.0%	Negative
USA	1,078,000	4.1%	1,077,400	-0.1%	Neutral
UK	590,600	-0.2%	636,300	7.7%	Positive
Thailand	544,700	-3.7%	586,900	7.7%	Positive
China	472,500	10.5%	540,900	14.5%	Positive
Singapore	388,600	5.9%	406,900	4.7%	Positive
Japan	357,100	14.1%	407,700	14.2%	Positive
Fiji	347,100	-3.3%	341,000	-1.8%	Neutral
India	324,500	12.7%	370,400	14.1%	Positive
National Total	9,976,100	5.6%	10,591,300	6.2%	Positive



Source: January 2018 Short-term Movement, Residents Returning - Selected Destinations: Seasonally adjusted

Monthly changes to popular international destinations travelled to by Australian's – January 2018

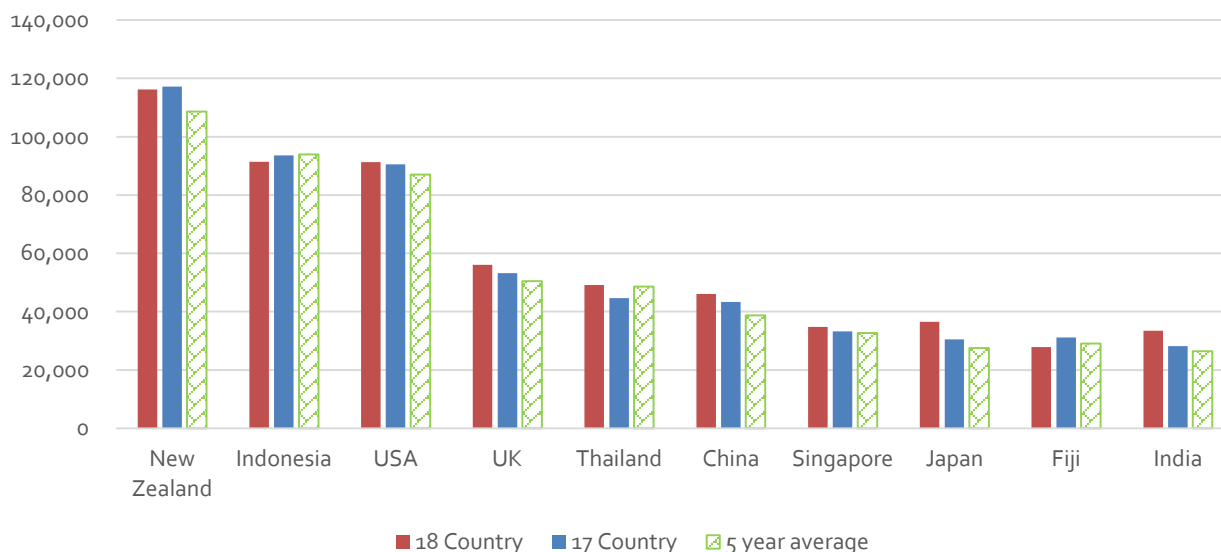
This section displays the performance of the major destinations Australian's are travelling to comparing January 2017 to January 2018

Key Highlights

Following two consecutive month declines, USA is forecasted to be Australia's second most visited destination in January 2019.

NZ update 5.3% for year end but down 0.9% in January.

Destination	Total number of travellers 2017	2017 Year end change	Total number of travellers 2018	2018 Year end change	2018 Performance
New Zealand	117,200	8.8%	116,200	-0.9%	Neutral
Indonesia	93,600	-9.2%	91,400	-2.4%	Negative
USA	90,500	1.6%	91,300	0.9%	Neutral
UK	53,200	10.8%	56,100	5.5%	Positive
Thailand	44,600	-2.2%	49,100	10.1%	Positive
China	43,300	19.3%	46,100	6.5%	Positive
Singapore	33,200	11.0%	34,800	4.8%	Positive
Japan	30,500	5.9%	36,500	19.7%	Positive
Fiji	31,100	3.3%	27,800	-10.6%	Negative
India	28,200	12.4%	33,500	18.8%	Positive
National Total	849,100	5.0%	894,100	5.3%	Positive

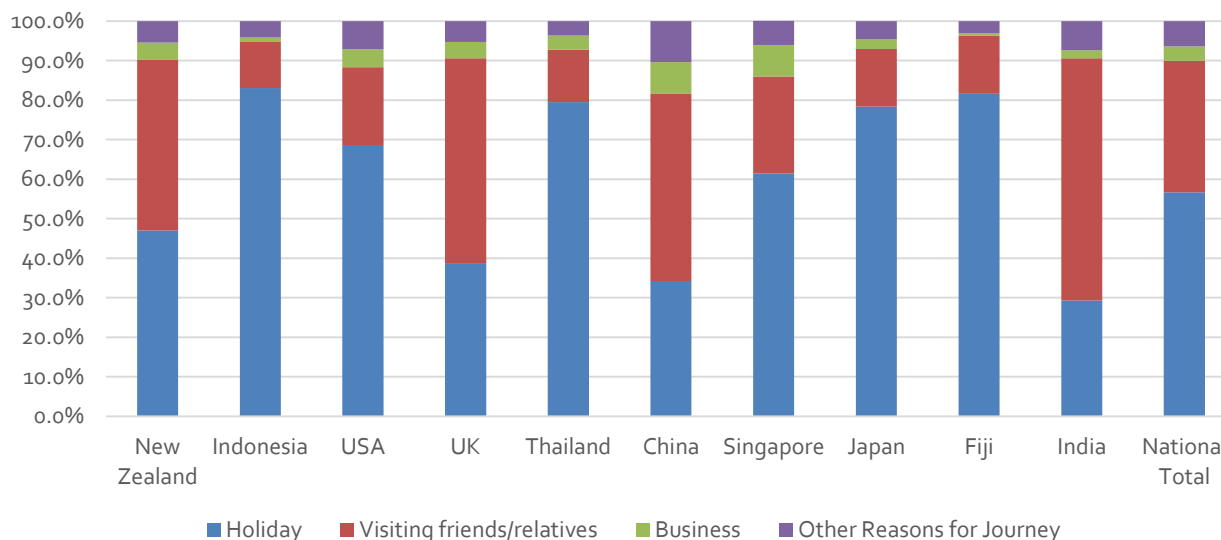


Source: January 2018 Short-term Movement, Residents Returning - Selected Destinations: Seasonally adjusted

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

This section displays the performance of the popular destinations visited by Australian's by reason of travel in January 2018.

	Holiday	Visiting friends/relatives	Business	Other Reasons for Journey
New Zealand	47.0%	43.2%	4.4%	5.4%
Indonesia	83.1%	11.6%	1.2%	4.1%
USA	68.6%	19.7%	4.5%	7.2%
UK	38.7%	51.8%	4.1%	5.3%
Thailand	79.5%	13.3%	3.5%	3.7%
China	34.3%	47.4%	8.0%	10.4%
Singapore	61.4%	24.5%	8.0%	6.1%
Japan	78.4%	14.5%	2.4%	4.7%
Fiji	81.6%	14.7%	0.6%	3.1%
India	29.3%	61.3%	2.1%	7.3%
National Total	56.6%	33.3%	3.6%	6.5%



Source: January 2018 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 December 2017 (includes five dedicated freight airlines but excludes airlines operating only via code share arrangements).



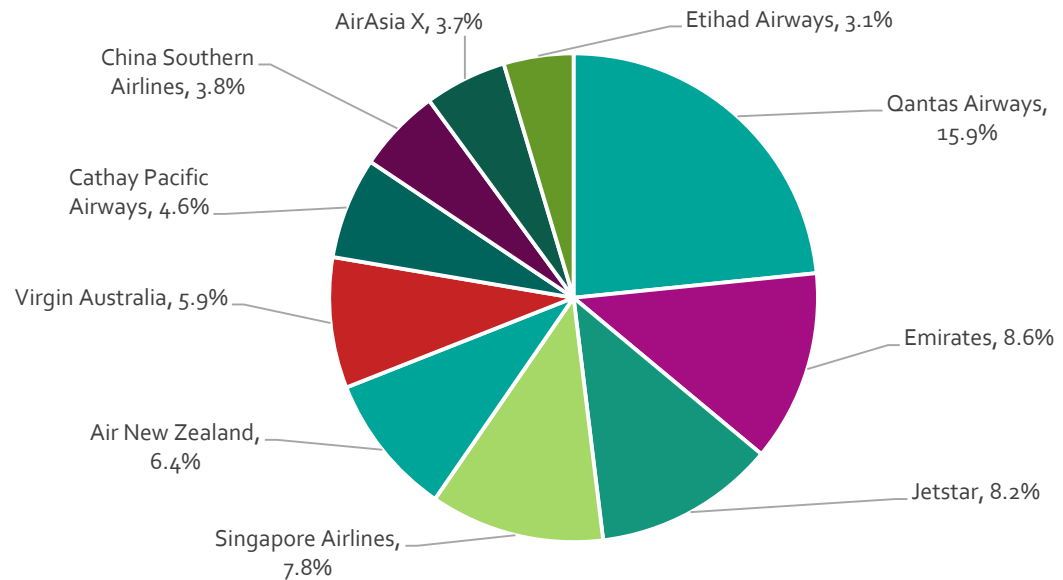
Source: International Airline Activity—Monthly Publications, December 2017

Airline activity - Month End December 2017

This snapshot displays the market share of each airline for international travel for the month of December 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	December -16	December -17
Qantas Airways	15.1%	15.9%
Emirates	9.1%	8.6%
Jetstar	8.9%	8.2%
Singapore Airlines	7.9%	7.8%
Air New Zealand	6.4%	6.4%
Virgin Australia	5.8%	5.9%
Cathay Pacific Airways	4.5%	4.6%
China Southern Airlines	3.2%	3.8%
AirAsia X	4.2%	3.7%
Etihad Airways	3.2%	3.1%



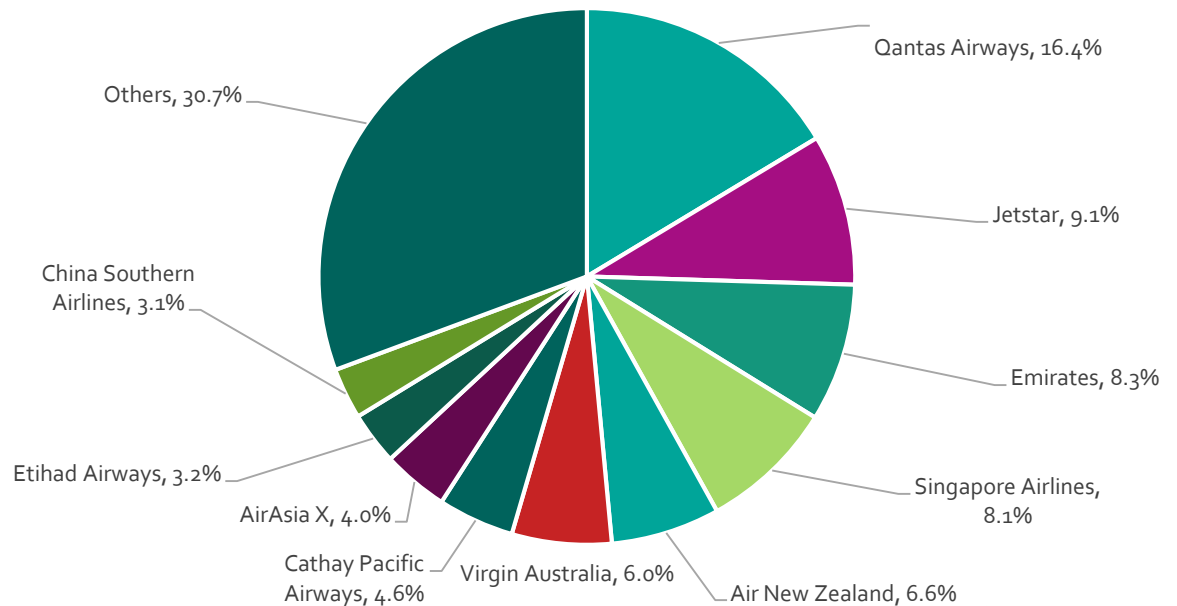
Source: International Airline Activity—Monthly Publications, December 2016 and December 2017

Airline activity – Year End December 2017

This snapshot displays the market share of each airline for international travel of Year end – December 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	December -16	Year End share of passengers carried	December - 17
Qantas Airways	15.6%	Qantas Airways	16.4%
Jetstar	9.5%	Jetstar	9.1%
Emirates	8.8%	Emirates	8.3%
Singapore Airlines	8.1%	Singapore Airlines	8.1%
Air New Zealand	6.8%	Air New Zealand	6.6%
Virgin Australia	6.3%	Virgin Australia	6.0%
Cathay Pacific Airways	4.9%	Cathay Pacific Airways	4.6%
AirAsia X	3.9%	AirAsia X	4.0%
Etihad Airways	3.1%	Etihad Airways	3.2%
China Southern Airlines	2.9%	China Southern Airlines	3.1%
Others	30.2%	Others	30.7%



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

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