

AFTA Travel Trends

April 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 February 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 February 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 February 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.

	February YE 2017 Total number of international visitors to Australia <i>Inbound</i>	February YE 2017 Total number of international trips by Australians <i>Outbound</i>	February YE 2018 Total number of international visitors to Australia <i>Inbound</i>	February YE 2018 Total number of international trips by Australians <i>Outbound</i>
China	1,243,400	484,500	1,398,800	532,200
New Zealand	1,346,600	1,359,200	1,357,100	1,421,100
USA	729,500	1,079,300	802,200	1,074,300
UK	719,700	595,800	728,700	636,900
Singapore	434,300	394,600	440,000	401,900
Japan	421,800	362,800	438,300	410,900
Malaysia	393,000	259,800	399,600	269,100
South Korea	285,900	74,200	301,500	73,100
India	269,800	332,300	311,500	370,300
Hong Kong	250,200	223,000	288,100	225,400
Indonesia	178,300	1,231,600	192,200	1,176,400
Thailand	94,300	548,800	97,300	588,300
Fiji	37,500	349,300	43,300	340,600
National Total	8,378,100	10,073,400	8,928,300	10,569,500

Source: February 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 – February 2018

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

Key Highlights

Growth continues to follow trend with an average for last three years of 8.4%.

Summer arrivals up on average of 4.9%.

Month	Total number of travellers 2017	2017 Year end change	Total number of travellers 2018	2018 Year end change	2018 Performance
March	674,000	9.0%	709,800	5.3%	Positive
April	675,100	11.9%	747,200	10.7%	Positive
May	677,500	11.5%	731,900	8.0%	Positive
June	695,600	12.8%	727,900	4.6%	Positive
July	693,600	13.4%	746,100	7.6%	Positive
August	690,500	10.7%	758,000	9.8%	Positive
September	717,700	12.2%	742,100	3.4%	Positive
October	707,400	11.9%	756,500	6.9%	Positive
November	700,400	7.9%	755,200	7.8%	Positive
December	713,800	7.5%	741,900	3.9%	Positive
January	709,600	7.5%	760,300	7.1%	Positive
February	722,900	12.0%	751,400	3.9%	Positive
Total	8,378,100	10.7%	8,928,300	6.6%	Positive



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

Year end changes to top Australian source markets – February 2018

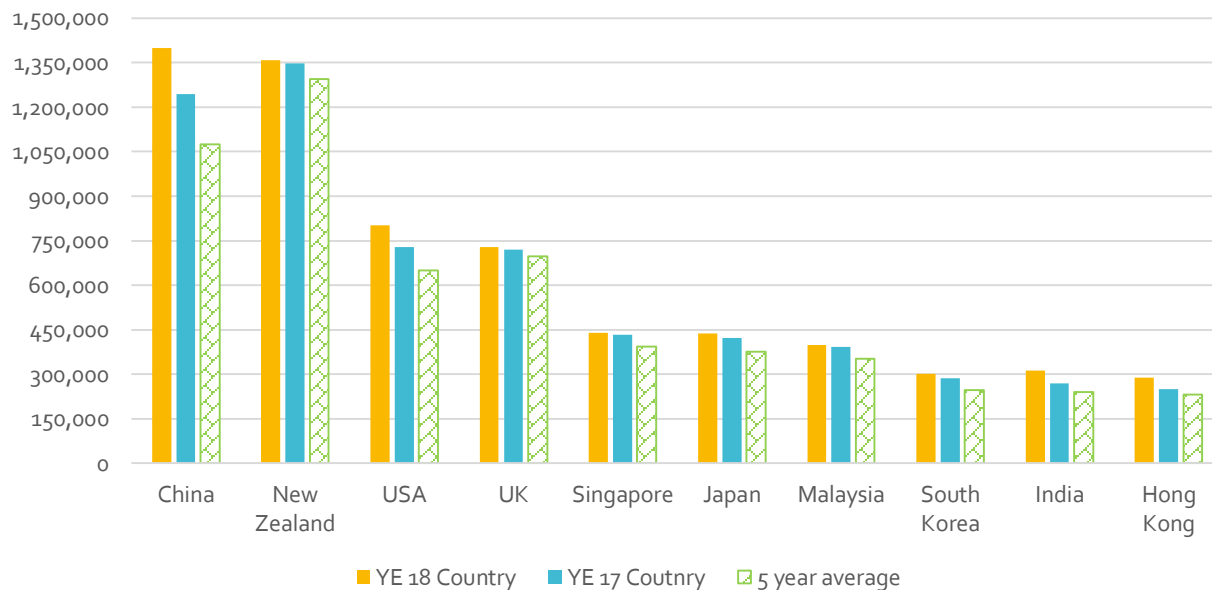
This section displays the performance of the major Australian source markets for international travellers as of February Year end 2017 and 2018.

Key Highlights

All markets are above the 5 year average.

India delivers an average growth of 15.5% over the last two years.

Destination	Total number of travellers 2017	2017 Year end change	Total number of travellers 2018	2018 Year end change	2018 Performance
China	1,243,400	14.3%	1,398,800	12.5%	Positive
New Zealand	1,346,600	2.4%	1,357,100	0.8%	Neutral
USA	729,500	15.9%	802,200	10.0%	Positive
UK	719,700	3.9%	728,700	1.3%	Positive
Singapore	434,300	10.9%	440,000	1.3%	Positive
Japan	421,800	18.8%	438,300	3.9%	Positive
Malaysia	393,000	13.1%	399,600	1.7%	Neutral
South Korea	285,900	22.4%	301,500	5.5%	Positive
India	269,800	15.5%	311,500	15.5%	Positive
Hong Kong	250,200	10.2%	288,100	15.1%	Positive
National Total	8,378,100	10.7%	8,928,300	6.6%	Positive



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

Monthly changes to top Australian source markets – February 2018

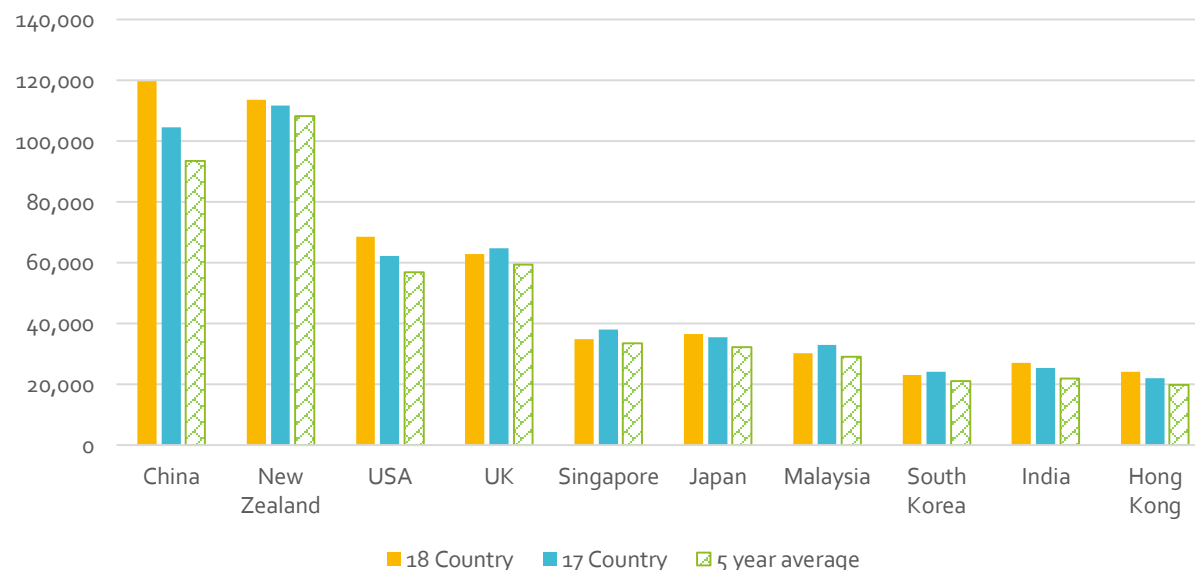
This section displays the performance of the major Australian source markets for international tourists comparing the month of February 2017 to February 2018.

Key Highlights

Seeking an escape from the winter chill, movements from the USA are up an average of 9.8%.

Outside the growth of arrivals from China, the rest of Asia grew 0.7%.

Destination	Total number of travellers 2017	2017 Year end change	Total number of travellers 2018	2018 Year end change	2018 Performance
China	104,500	18.3%	119,700	14.5%	Positive
New Zealand	111,700	8.2%	113,600	1.7%	Neutral
USA	62,300	9.5%	68,500	10.0%	Positive
UK	64,700	10.6%	63,000	-2.6%	Negative
Singapore	38,100	13.4%	35,000	-8.1%	Negative
Japan	35,600	2.3%	36,700	3.1%	Positive
Malaysia	33,100	8.5%	30,200	-8.8%	Negative
South Korea	24,200	0.4%	23,100	-4.5%	Negative
India	25,400	30.3%	27,100	6.7%	Positive
Hong Kong	22,100	11.6%	24,300	10.0%	Positive
National Total	722,900	12.0%	751,400	3.9%	Positive



Source: February 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 – February 2018

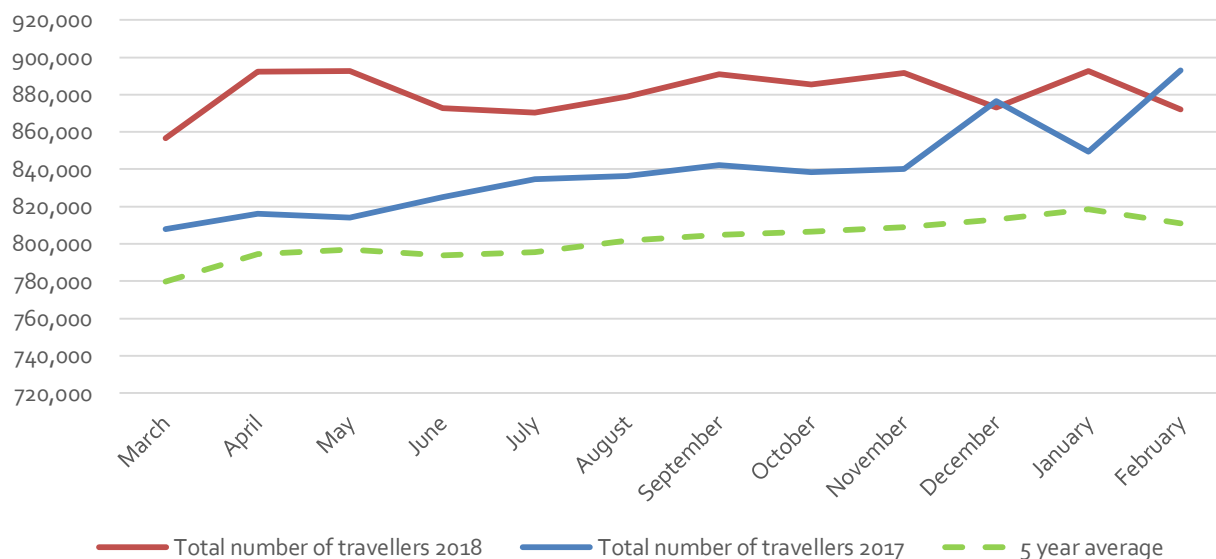
This section displays the number of Australians travelling outbound each month as of February Year end 2017 and 2018.

Key Highlights

Summer outbound growth is 0.86%.

Average February growth for the last three years was 4.5%.

Month	Total number of travellers 2017	2017 Year end change	Total number of travellers 2018	2018 Year end change	2018 Performance
March	807,900	3.8%	856,700	6.0%	Positive
April	816,000	4.8%	892,400	9.4%	Positive
May	813,900	4.8%	892,600	9.7%	Positive
June	825,000	5.0%	872,800	5.8%	Positive
July	834,800	8.3%	870,400	4.3%	Positive
August	836,400	4.9%	878,800	5.1%	Positive
September	842,100	6.2%	891,000	5.8%	Positive
October	838,500	6.0%	885,300	5.6%	Positive
November	840,000	4.9%	891,700	6.2%	Positive
December	876,400	7.7%	873,000	-0.4%	Neutral
January	849,400	5.1%	892,800	5.1%	Positive
February	893,000	12.3%	872,000	-2.4%	Negative
Total	10,073,400	6.2%	10,569,500	4.9%	Positive



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

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

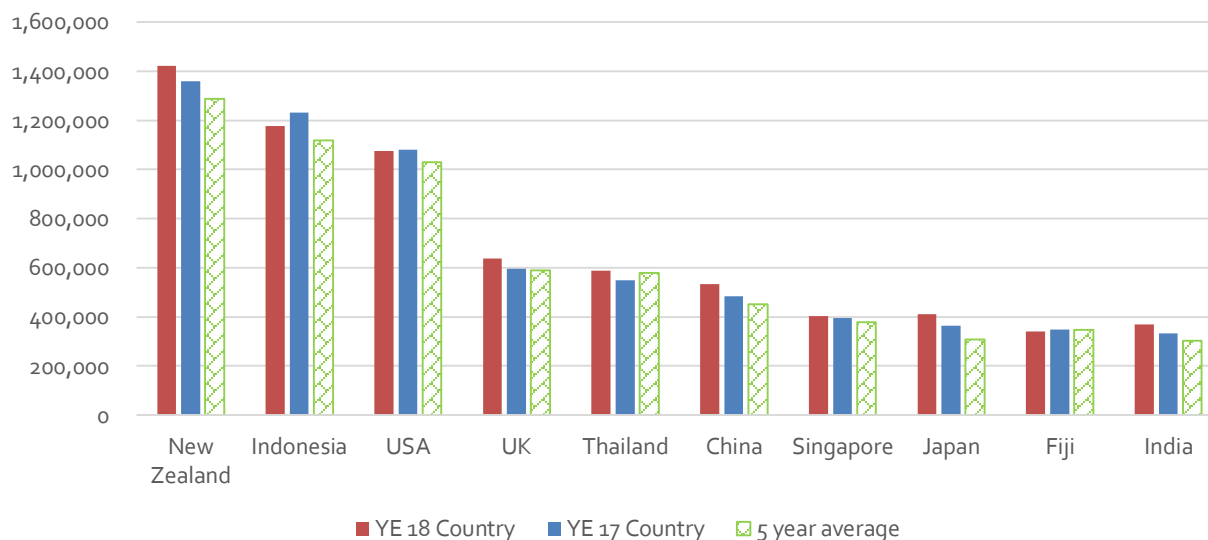
This section displays the performance of the major destinations Australian's are travelling to as of February Year end 2017 and 2018.

Key Highlights

Japan growth continues and has surpassed Singapore in total movements.

India now has a greater number of movements than Fiji.

Destination	Total number of travellers 2017	2017 Year end change	Total number of travellers 2018	2018 Year end change	2018 Performance
New Zealand	1,359,200	6.9%	1,421,100	4.6%	Positive
Indonesia	1,231,600	10.4%	1,176,400	-4.5%	Negative
USA	1,079,300	4.0%	1,074,300	-0.5%	Neutral
UK	595,800	0.3%	636,900	6.9%	Positive
Thailand	548,800	-2.2%	588,300	7.2%	Positive
China	484,500	11.0%	532,200	9.8%	Positive
Singapore	394,600	7.9%	401,900	1.8%	Neutral
Japan	362,800	15.4%	410,900	13.3%	Positive
Fiji	349,300	-2.0%	340,600	-2.5%	Negative
India	332,300	14.5%	370,300	11.4%	Positive
National Total	10,073,400	6.2%	10,569,500	4.9%	Positive



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

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

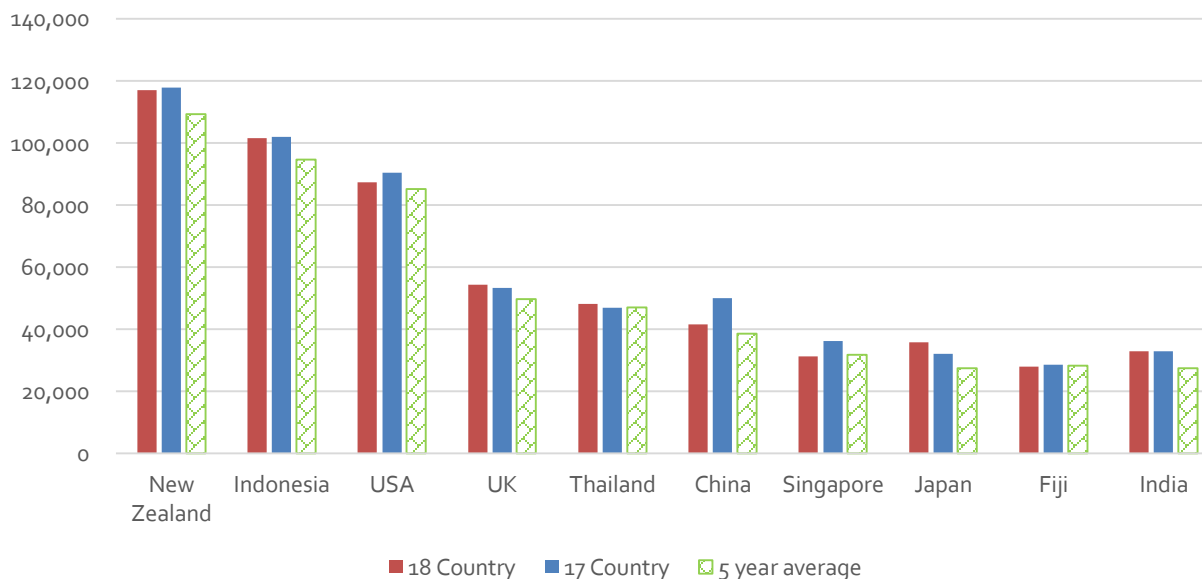
This section displays the performance of the major destinations Australian's are travelling to comparing February 2017 to February 2018

Key Highlights

Major destinations soften with only the UK, Thailand and Japan experiencing growth .

India consolidates growth with a neutral performance in 2018.

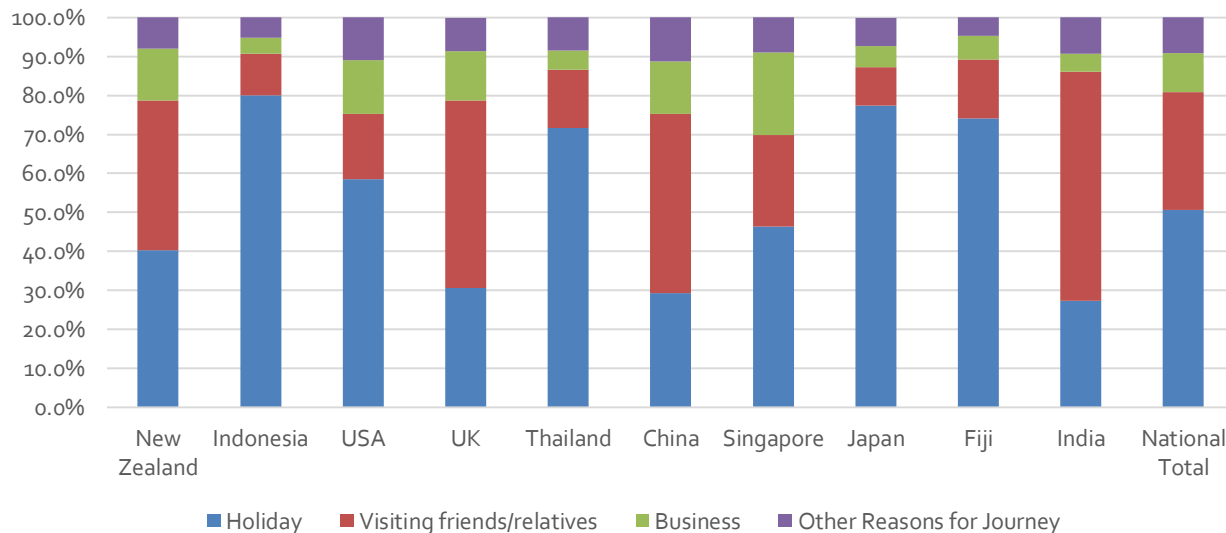
Destination	Total number of travellers 2017	2017 Year end change	Total number of travellers 2018	2018 Year end change	2018 Performance
New Zealand	118,000	7.6%	117,100	-0.8%	Neutral
Indonesia	102,100	5.0%	101,600	-0.5%	Neutral
USA	90,500	1.8%	87,300	-3.5%	Negative
UK	53,400	10.8%	54,400	1.9%	Neutral
Thailand	46,900	9.6%	48,200	2.8%	Positive
China	50,100	32.5%	41,500	-17.2%	Negative
Singapore	36,200	21.9%	31,200	-13.8%	Negative
Japan	32,100	23.0%	35,800	11.5%	Positive
Fiji	28,500	8.0%	28,000	-1.8%	Neutral
India	32,800	29.1%	32,800	0.0%	Neutral
National Total	893,000	12.3%	872,000	-2.4%	Negative



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

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

	Holiday	Visiting friends/relatives	Business	Other Reasons for Journey
New Zealand	40.4%	38.3%	13.3%	8.0%
Indonesia	80.1%	10.7%	4.1%	5.1%
USA	58.4%	16.8%	13.8%	11.0%
UK	30.6%	48.0%	12.7%	8.5%
Thailand	71.7%	15.0%	4.9%	8.4%
China	29.3%	46.0%	13.5%	11.3%
Singapore	46.4%	23.4%	21.2%	9.0%
Japan	77.4%	9.9%	5.3%	7.4%
Fiji	74.1%	15.1%	6.0%	4.7%
India	27.3%	58.8%	4.6%	9.3%
National Total	50.7%	30.3%	9.9%	9.2%



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



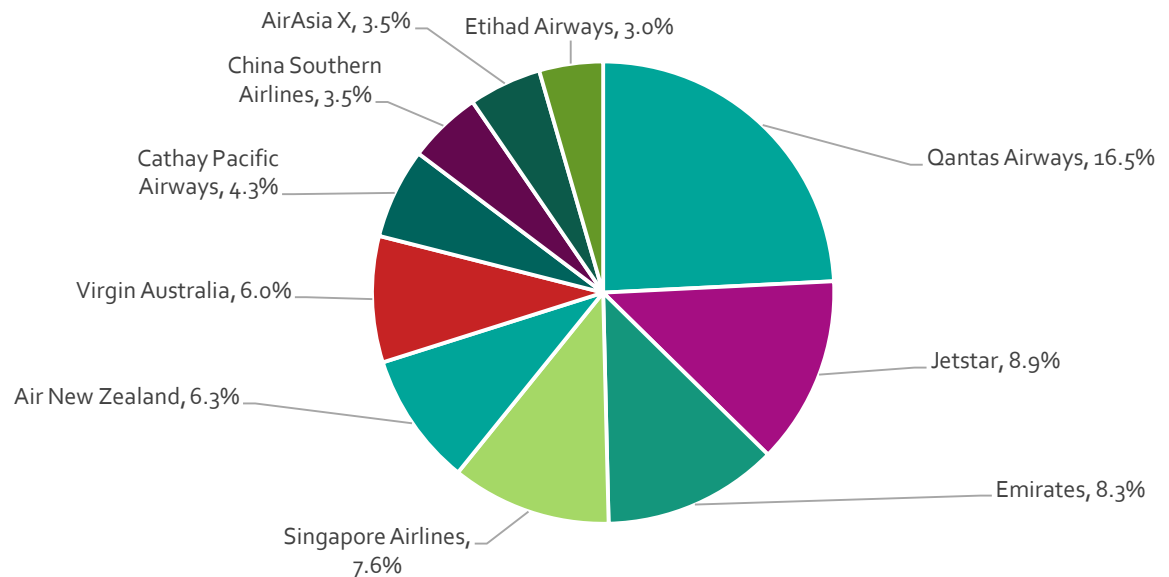
Source: International Airline Activity—Monthly Publications, January 2018

Airline activity - Month End January 2018

This snapshot displays the market share of each airline for international travel for the month of January 2018.

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	January -17	January -18
Qantas Airways	16.2%	16.5%
Emirates	9.1%	8.9%
Jetstar	8.9%	8.3%
Singapore Airlines	7.8%	7.6%
Air New Zealand	6.2%	6.3%
Virgin Australia	5.6%	6.0%
Cathay Pacific Airways	4.0%	4.3%
China Southern Airlines	3.5%	3.5%
AirAsia X	4.1%	3.5%
Etihad Airways	3.0%	3.0%



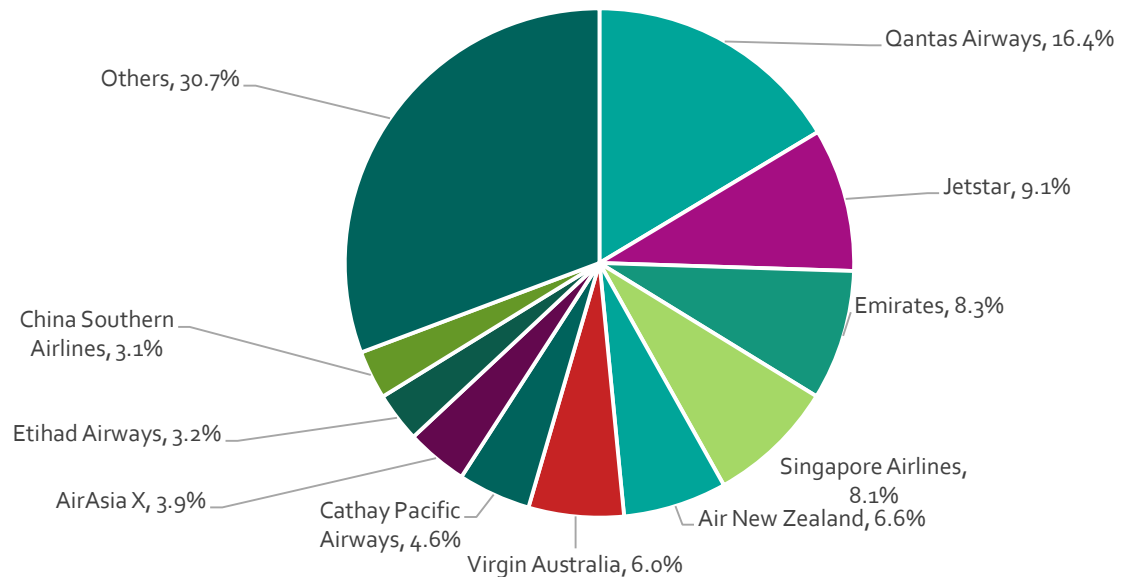
Source: International Airline Activity—Monthly Publications, January 2017 and January 2018

Airline activity – Year End January 2018

This snapshot displays the market share of each airline for international travel of Year end – January 2018.

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	January -17	Year End share of passengers carried	January - 18
Qantas Airways	15.7%	Qantas Airways	16.4%
Jetstar	9.4%	Jetstar	9.1%
Emirates	8.8%	Emirates	8.3%
Singapore Airlines	8.1%	Singapore Airlines	8.1%
Air New Zealand	6.7%	Air New Zealand	6.6%
Virgin Australia	6.2%	Virgin Australia	6.0%
Cathay Pacific Airways	4.8%	Cathay Pacific Airways	4.6%
AirAsia X	3.9%	AirAsia X	3.9%
Etihad Airways	3.1%	Etihad Airways	3.2%
China Southern Airlines	2.9%	China Southern Airlines	3.1%
Others	30.4%	Others	30.7%



Source: International Airline Activity—Monthly Publications, January 2017 and January 2018

For further information please contact:

Dean Long

Head of Public Policy and Strategic Partnerships

E: Dean.Long@afta.com.au

Ph: 02 9287 9900

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