

# AFTA Travel Trends

May 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 March 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 March 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 March 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.

	March YE 2017 Total number of international visitors to Australia <i>Inbound</i>	March YE 2017 Total number of international trips by Australians <i>Outbound</i>	March YE 2018 Total number of international visitors to Australia <i>Inbound</i>	March YE 2018 Total number of international trips by Australians <i>Outbound</i>
China	1,252,200	484,100	1,409,200	552,400
New Zealand	1,352,200	1,366,500	1,363,700	1,432,100
USA	735,000	1,087,800	802,800	1,069,200
UK	720,200	599,600	731,300	635,400
Singapore	433,300	397,900	444,200	396,400
Japan	426,600	365,500	436,600	417,200
Malaysia	395,600	259,300	401,000	270,200
South Korea	285,200	74,700	304,800	73,000
India	270,600	332,600	319,500	373,700
Hong Kong	249,400	223,100	295,200	225,500
Indonesia	179,300	1,232,400	192,800	1,184,900
Thailand	94,200	549,900	97,800	587,900
Fiji	37,200	347,500	43,400	339,500
<b>National Total</b>	<b>8,414,700</b>	<b>10,120,900</b>	<b>8,996,800</b>	<b>10,625,600</b>

Source: March 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 – March 2018

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

### Key Highlights

**March has an average 3 year growth of 7.7%.**

**In 2017, January, February and March had a growth rate of 8.3%. In 2018 it was down to 6.8%.**

Month	Total number of travellers 2017	2017 Year end change	Total number of travellers 2018	2018 Year end change	2018 Performance
April	675,300	11.9%	746,500	10.5%	Positive
May	678,300	11.6%	733,800	8.2%	Positive
June	696,000	12.7%	728,200	4.6%	Positive
July	693,400	13.4%	746,000	7.6%	Positive
August	691,200	10.9%	758,100	9.7%	Positive
September	717,200	12.2%	742,100	3.5%	Positive
October	707,600	11.9%	756,800	7.0%	Positive
November	701,300	8.0%	755,300	7.7%	Positive
December	712,900	7.5%	744,100	4.4%	Positive
January	710,500	7.6%	762,500	7.3%	Positive
February	723,100	12.0%	751,800	4.0%	Positive
March	707,900	5.3%	771,600	9.0%	Positive
<b>Total</b>	<b>8,414,700</b>	<b>10.3%</b>	<b>8,996,800</b>	<b>6.9%</b>	<b>Positive</b>



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

## Year end changes to top Australian source markets – March 2018

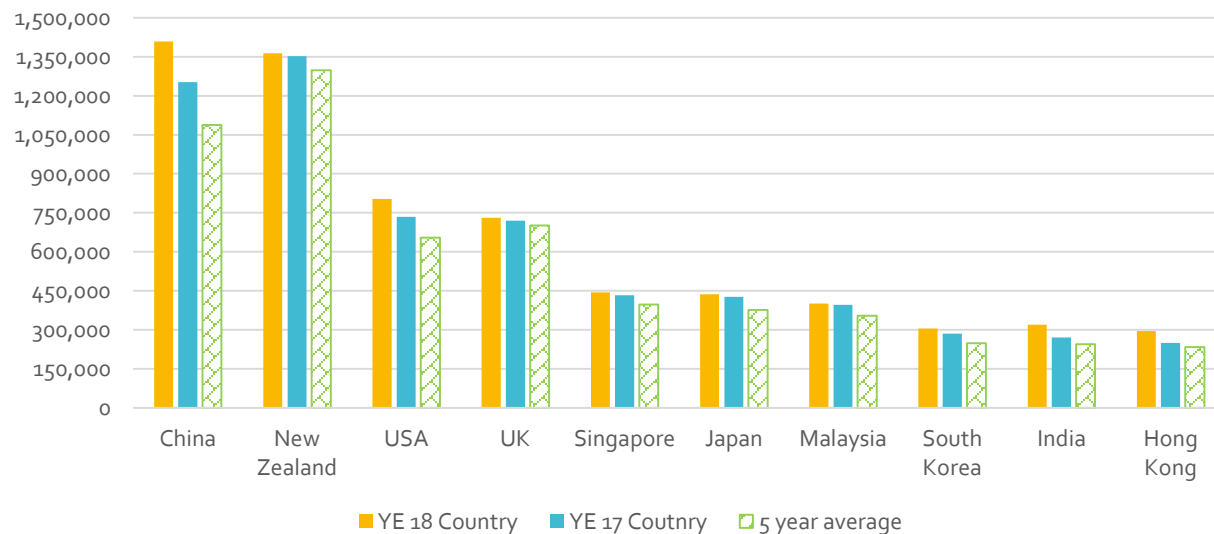
This section displays the performance of the major Australian source markets for international travellers as of March Year end 2017 and 2018.

### Key Highlights

**India growth up an average of 17% for the last two years.**

**China arrivals extend lead over NZ by 45,500 movements.**

Destination	Total number of travellers 2017	2017 Year end change	Total number of travellers 2018	2018 Year end change	2018 Performance
China	1,252,200	12.9%	1,409,200	12.5%	Positive
New Zealand	1,352,200	3.0%	1,363,700	0.9%	Neutral
USA	735,000	15.6%	802,800	9.2%	Positive
UK	720,200	4.0%	731,300	1.5%	Neutral
Singapore	433,300	8.7%	444,200	2.5%	Positive
Japan	426,600	17.7%	436,600	2.3%	Positive
Malaysia	395,600	12.5%	401,000	1.4%	Neutral
South Korea	285,200	19.7%	304,800	6.9%	Positive
India	270,600	15.8%	319,500	18.1%	Positive
Hong Kong	249,400	9.3%	295,200	18.4%	Positive
<b>National Total</b>	<b>8,414,700</b>	<b>10.3%</b>	<b>8,996,800</b>	<b>6.9%</b>	<b>Positive</b>



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

## Monthly changes to top Australian source markets – March 2018

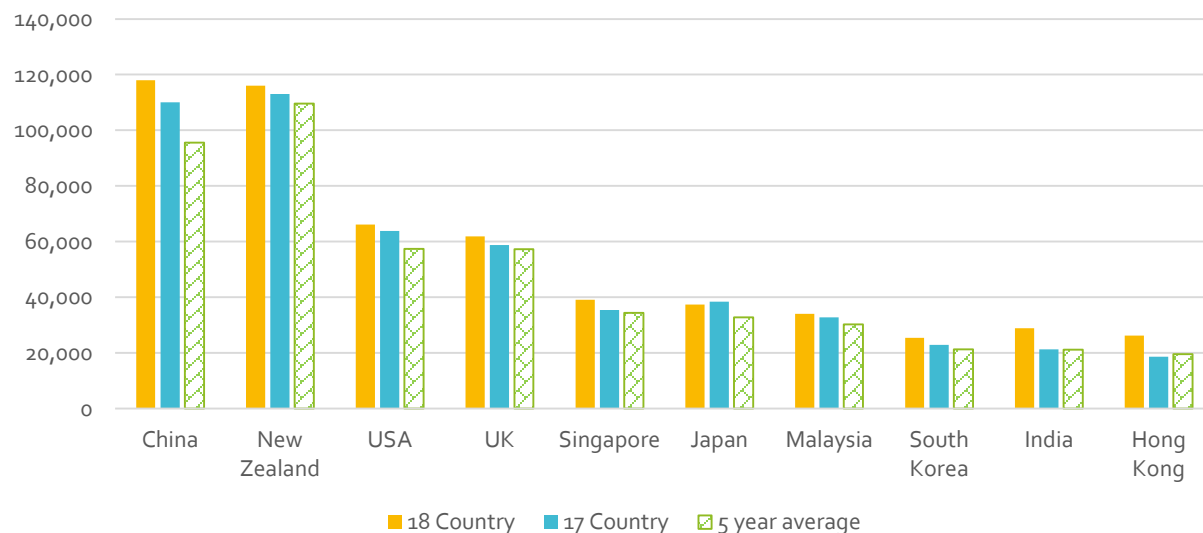
This section displays the performance of the major Australian source markets for international tourists comparing the month of March 2017 to March 2018.

### Key Highlights

**Japan is the only market to not have growth, but is still above the 5 year average.**

**The 9% growth in movements is a high for the last two years for March.**

Destination	Total number of travellers 2017	2017 Year end change	Total number of travellers 2018	2018 Year end change	2018 Performance
China	110,000	8.3%	118,000	7.3%	Positive
New Zealand	113,000	5.2%	116,000	2.7%	Positive
USA	63,800	9.8%	66,100	3.6%	Positive
UK	58,700	0.9%	61,900	5.5%	Positive
Singapore	35,400	-3.3%	39,100	10.5%	Positive
Japan	38,400	15.3%	37,300	-2.9%	Negative
Malaysia	32,700	7.2%	34,000	4.0%	Positive
South Korea	22,900	-2.6%	25,400	10.9%	Positive
India	21,300	2.9%	28,800	35.2%	Positive
Hong Kong	18,600	-4.1%	26,200	40.9%	Positive
National Total	707,900	5.3%	771,600	9.0%	Positive



Source: March 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 – March 2018

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

### Key Highlights

**March returns to growth up 6.0% from a -2.3% in February.**

**A 6% increase for March tracks above the 5 year trend of 5.4%.**

Month	Total number of travellers 2017	2017 Year end change	Total number of travellers 2018	2018 Year end change	2018 Performance
April	814,900	4.6%	891,600	9.4%	Positive
May	814,500	4.9%	893,200	9.7%	Positive
June	825,900	5.0%	873,600	5.8%	Positive
July	834,200	8.2%	870,200	4.3%	Positive
August	837,900	5.1%	879,300	4.9%	Positive
September	841,700	6.2%	888,600	5.6%	Positive
October	837,800	6.0%	887,400	5.9%	Positive
November	839,800	5.0%	890,300	6.0%	Positive
December	873,600	7.4%	875,600	0.2%	Neutral
January	851,000	5.3%	895,500	5.2%	Positive
February	893,100	12.4%	872,200	-2.3%	Negative
March	856,500	5.9%	908,100	6.0%	Positive
<b>Total</b>	<b>10,120,900</b>	<b>6.3%</b>	<b>10,625,600</b>	<b>5.0%</b>	<b>Positive</b>



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

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

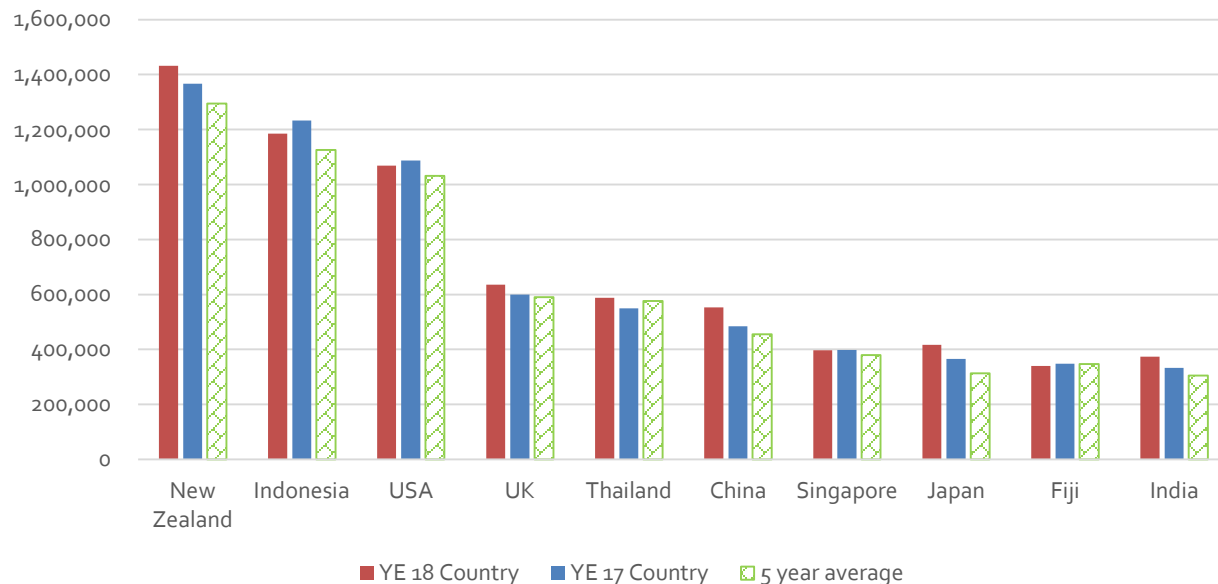
This section displays the performance of the major destinations Australian's are travelling to as of March Year end 2017 and 2018.

### Key Highlights

**Fiji is the only country to slip below the 5 year average of the major markets.**

**Indonesia movements down at 2016 levels.**

Destination	Total number of travellers 2017	2017 Year end change	Total number of travellers 2018	2018 Year end change	2018 Performance
New Zealand	1,366,500	6.6%	1,432,100	4.8%	Positive
Indonesia	1,232,400	10.3%	1,184,900	-3.9%	Negative
USA	1,087,800	5.4%	1,069,200	-1.7%	Neutral
UK	599,600	0.5%	635,400	6.0%	Positive
Thailand	549,900	-1.3%	587,900	6.9%	Positive
China	484,100	10.8%	552,400	14.1%	Positive
Singapore	397,900	7.9%	396,400	-0.4%	Neutral
Japan	365,500	14.8%	417,200	14.1%	Positive
Fiji	347,500	-3.1%	339,500	-2.3%	Negative
India	332,600	13.1%	373,700	12.4%	Positive
<b>National Total</b>	<b>10,120,900</b>	<b>6.3%</b>	<b>10,625,600</b>	<b>5.0%</b>	<b>Positive</b>



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

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

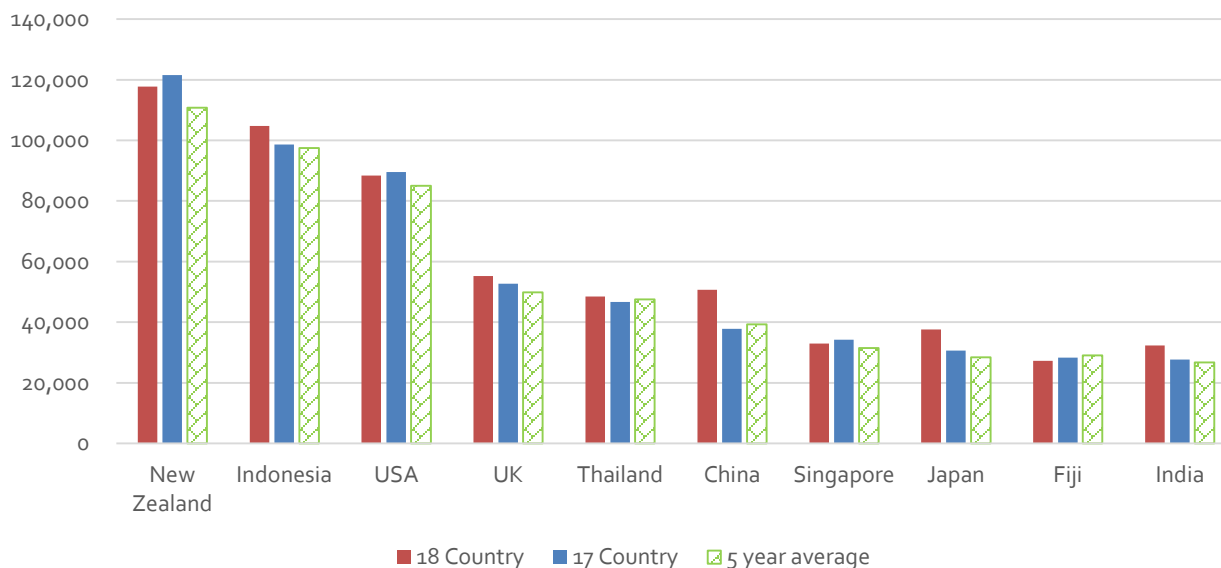
This section displays the performance of the major destinations Australian's are travelling to comparing March 2017 to March 2018

### Key Highlights

**China, Japan and India up on average of 24.5% for March 2018.**

**Fiji continues decline with an average 5.5% for 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
New Zealand	121,600	6.6%	117,700	-3.2%	Negative
Indonesia	98,600	0.2%	104,800	6.3%	Positive
USA	89,600	10.1%	88,400	-1.3%	Neutral
UK	52,700	8.2%	55,200	4.7%	Positive
Thailand	46,700	2.6%	48,500	3.9%	Positive
China	37,800	-0.3%	50,700	34.1%	Positive
Singapore	34,200	10.0%	33,000	-3.5%	Negative
Japan	30,600	8.5%	37,600	22.9%	Positive
Fiji	28,300	-7.2%	27,200	-3.9%	Negative
India	27,700	0.7%	32,300	16.6%	Positive
<b>National Total</b>	<b>856,500</b>	<b>5.9%</b>	<b>908,100</b>	<b>6.0%</b>	<b>Positive</b>

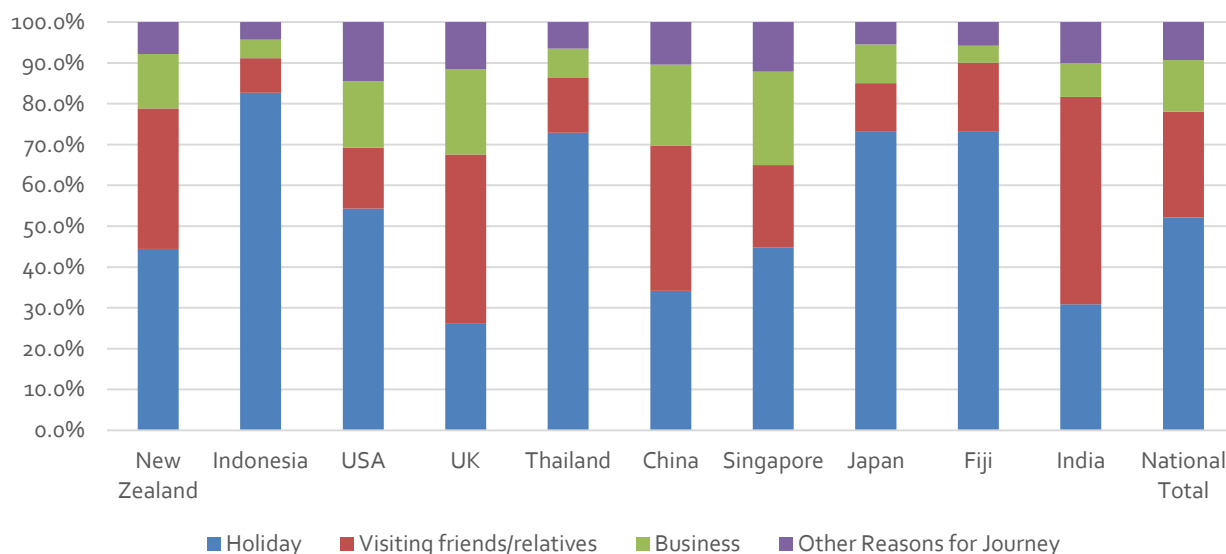


Source: March 2018 Short-term Movement, Residents Returning - Selected Destinations: Seasonally adjusted

## Reasons to travel to popular international destinations by Australian's – March 2018

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

	Holiday	Visiting friends/relatives	Business	Other Reasons for Journey
New Zealand	44.4%	34.4%	13.4%	7.8%
Indonesia	82.7%	8.5%	4.6%	4.3%
USA	54.3%	14.8%	16.4%	14.5%
UK	26.1%	41.5%	21.0%	11.5%
Thailand	72.9%	13.5%	7.0%	6.5%
China	34.2%	35.6%	19.8%	10.4%
Singapore	44.8%	20.2%	22.9%	12.1%
Japan	73.3%	11.7%	9.5%	5.5%
Fiji	73.1%	16.9%	4.2%	5.8%
India	30.9%	50.8%	8.3%	10.0%
<b>National Total</b>	<b>52.1%</b>	<b>25.9%</b>	<b>12.6%</b>	<b>9.3%</b>





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



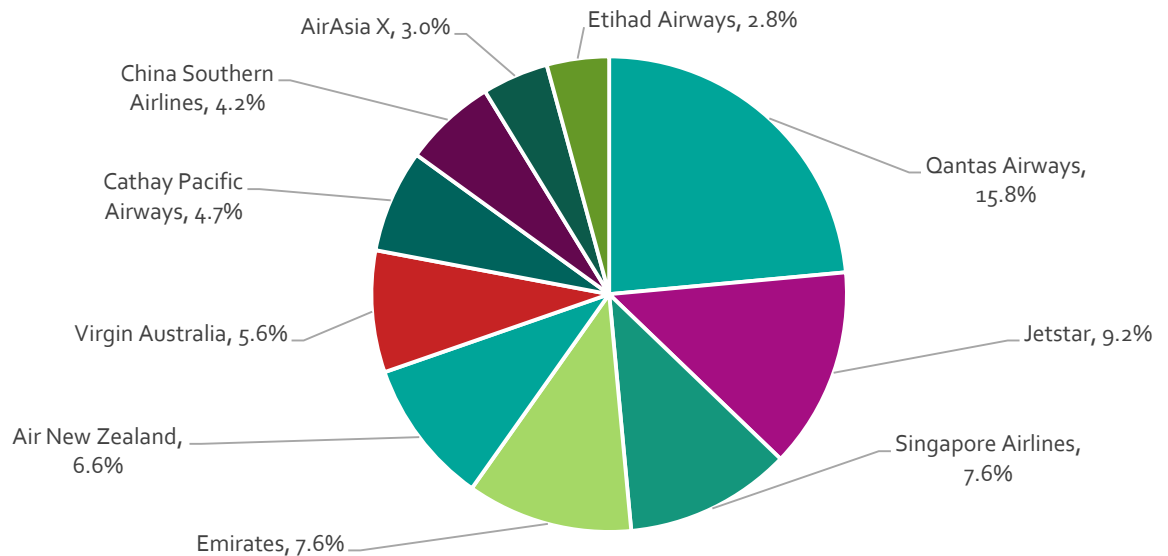
Source: International Airline Activity—Monthly Publications, February 2018

## Airline activity - Month End February 2018

This snapshot displays the market share of each airline for international travel for the month of February 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	February -17	February -18
<b>Qantas Airways</b>	16.1%	15.8%
<b>Jetstar</b>	9.1%	9.2%
<b>Singapore Airlines</b>	8.1%	7.6%
<b>Emirates</b>	8.4%	7.6%
<b>Air New Zealand</b>	6.6%	6.6%
<b>Virgin Australia</b>	5.4%	5.6%
<b>Cathay Pacific Airways</b>	5.0%	4.7%
<b>China Southern Airlines</b>	3.7%	4.2%
<b>AirAsia X</b>	4.2%	3.0%
<b>Etihad Airways</b>	3.1%	2.8%



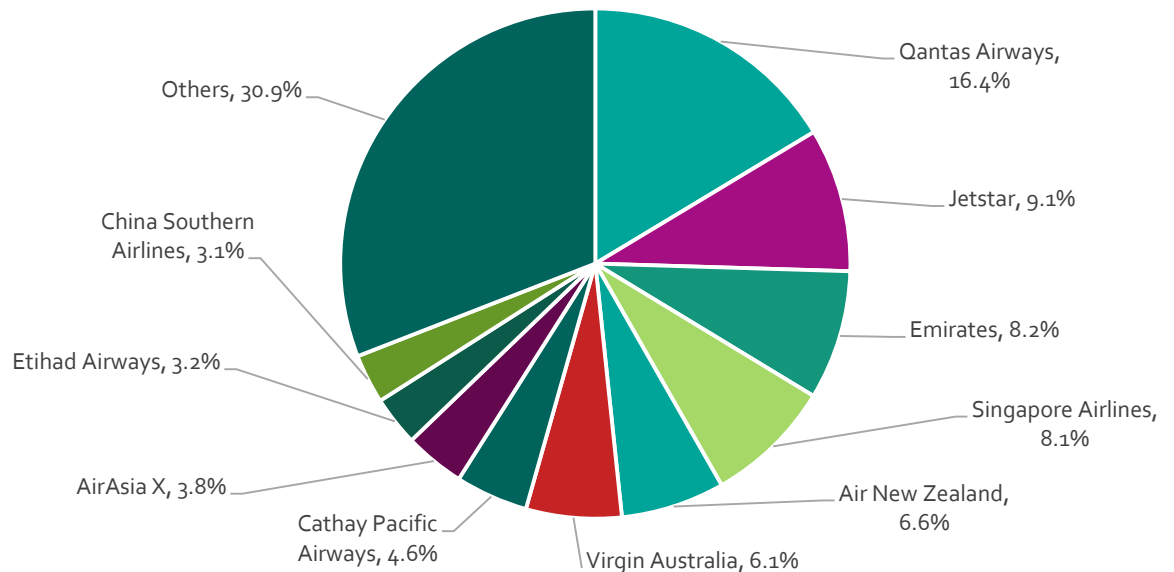
Source: International Airline Activity—Monthly Publications, February 2017 and February 2018

## Airline activity – Year End February 2018

This snapshot displays the market share of each airline for international travel of Year end – February 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	February - 17	Year End share of passengers carried	February - 18
<b>Qantas Airways</b>	15.7%	<b>Qantas Airways</b>	16.4%
<b>Jetstar</b>	9.4%	<b>Jetstar</b>	9.1%
<b>Emirates</b>	8.8%	<b>Emirates</b>	8.2%
<b>Singapore Airlines</b>	8.1%	<b>Singapore Airlines</b>	8.1%
<b>Air New Zealand</b>	6.7%	<b>Air New Zealand</b>	6.6%
<b>Virgin Australia</b>	6.1%	<b>Virgin Australia</b>	6.1%
<b>Cathay Pacific Airways</b>	4.8%	<b>Cathay Pacific Airways</b>	4.6%
<b>AirAsia X</b>	3.9%	<b>AirAsia X</b>	3.8%
<b>Etihad Airways</b>	3.1%	<b>Etihad Airways</b>	3.2%
<b>China Southern Airlines</b>	2.9%	<b>China Southern Airlines</b>	3.1%
<b>Others</b>	30.5%	<b>Others</b>	30.9%



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

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