

# AFTA Travel Trends

July 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 May 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 May 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 May 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.

	May YE 2017 Total number of international visitors to Australia <i>Inbound</i>	May YE 2017 Total number of international trips by Australians <i>Outbound</i>	May YE 2018 Total number of international visitors to Australia <i>Inbound</i>	May YE 2018 Total number of international trips by Australians <i>Outbound</i>
China	1,270,100	500,100	1,432,600	566,000
New Zealand	1,352,600	1,401,500	1,366,500	1,423,700
USA	756,600	1,083,500	791,800	1,078,400
UK	726,800	613,300	734,400	639,500
Singapore	437,300	399,100	434,700	406,000
Japan	426,100	374,100	443,000	429,900
Malaysia	401,300	265,000	389,100	267,700
South Korea	289,700	74,700	303,000	73,200
India	276,500	339,800	329,800	379,300
Hong Kong	262,500	220,400	293,600	232,500
Indonesia	184,800	1,229,600	194,200	1,207,000
Thailand	94,500	554,700	98,600	585,000
Fiji	38,100	351,100	44,400	338,900
<b>National Total</b>	<b>8,542,400</b>	<b>10,277,000</b>	<b>9,035,100</b>	<b>10,715,500</b>

Source: May 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 – May 2018

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

### Key Highlights

**Growth for 2018 is nearly half that of 2017.**

**Average growth rate for the last three months is 4.7%.**

Month	Total number of travellers 2017	2017 Year end change	Total number of travellers 2018	2018 Year end change	2018 Performance
June	696,100	12.9%	728,300	4.6%	Positive
July	693,900	13.3%	747,200	7.7%	Positive
August	690,800	10.7%	757,800	9.7%	Positive
September	718,000	12.3%	742,000	3.3%	Positive
October	707,800	11.9%	755,900	6.8%	Positive
November	700,000	7.8%	755,400	7.9%	Positive
December	712,600	7.6%	743,400	4.3%	Positive
January	709,400	7.5%	761,200	7.3%	Positive
February	721,900	11.9%	750,400	3.9%	Positive
March	707,200	5.4%	771,400	9.1%	Positive
April	750,900	10.8%	755,800	0.7%	Neutral
May	733,800	8.2%	766,300	4.4%	Positive
<b>Total</b>	<b>8,542,400</b>	<b>10.0%</b>	<b>9,035,100</b>	<b>5.8%</b>	<b>Positive</b>



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

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

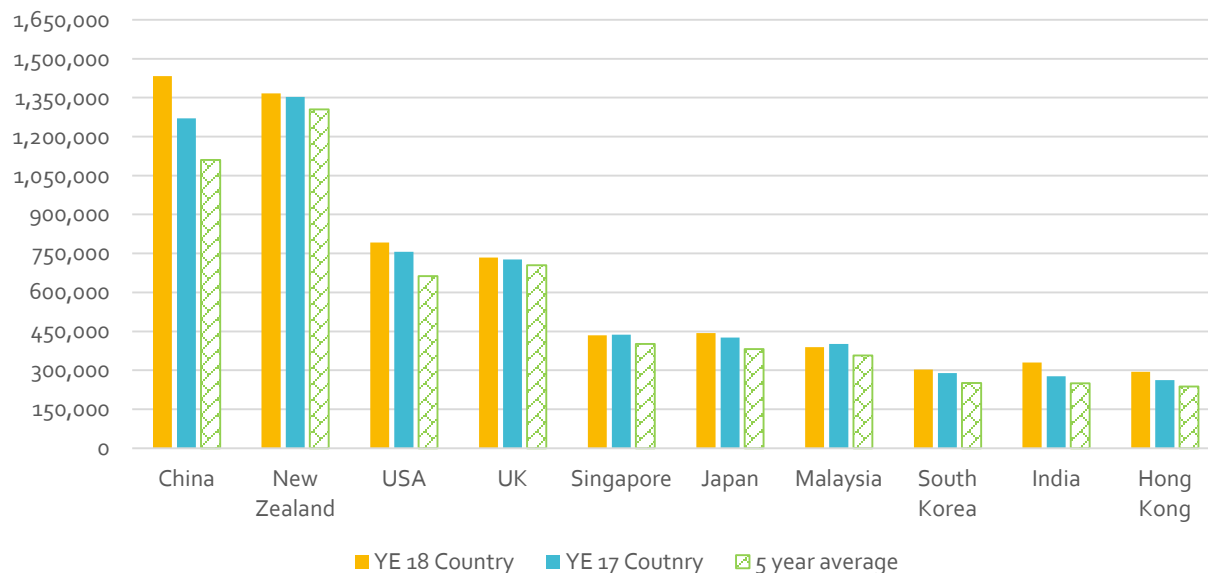
This section displays the performance of the major Australian source markets for international travellers as of May Year end 2017 and 2018.

### Key Highlights

**Average growth for Asia source markets is 7.1%.**

**Median growth for the 10 major markets is 4.6%.**

Destination	Total number of travellers 2017	2017 Year end change	Total number of travellers 2018	2018 Year end change	2018 Performance
China	1,270,100	11.0%	1,432,600	12.8%	Positive
New Zealand	1,352,600	2.8%	1,366,500	1.0%	Neutral
USA	756,600	15.7%	791,800	4.7%	Positive
UK	726,800	4.5%	734,400	1.0%	Neutral
Singapore	437,300	5.9%	434,700	-0.6%	Neutral
Japan	426,100	12.6%	443,000	4.0%	Positive
Malaysia	401,300	12.0%	389,100	-3.0%	Neutral
South Korea	289,700	17.1%	303,000	4.6%	Positive
India	276,500	15.8%	329,800	19.3%	Positive
Hong Kong	262,500	14.1%	293,600	11.8%	Positive
<b>National Total</b>	<b>8,542,400</b>	<b>10.0%</b>	<b>9,035,100</b>	<b>5.8%</b>	<b>Positive</b>



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

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

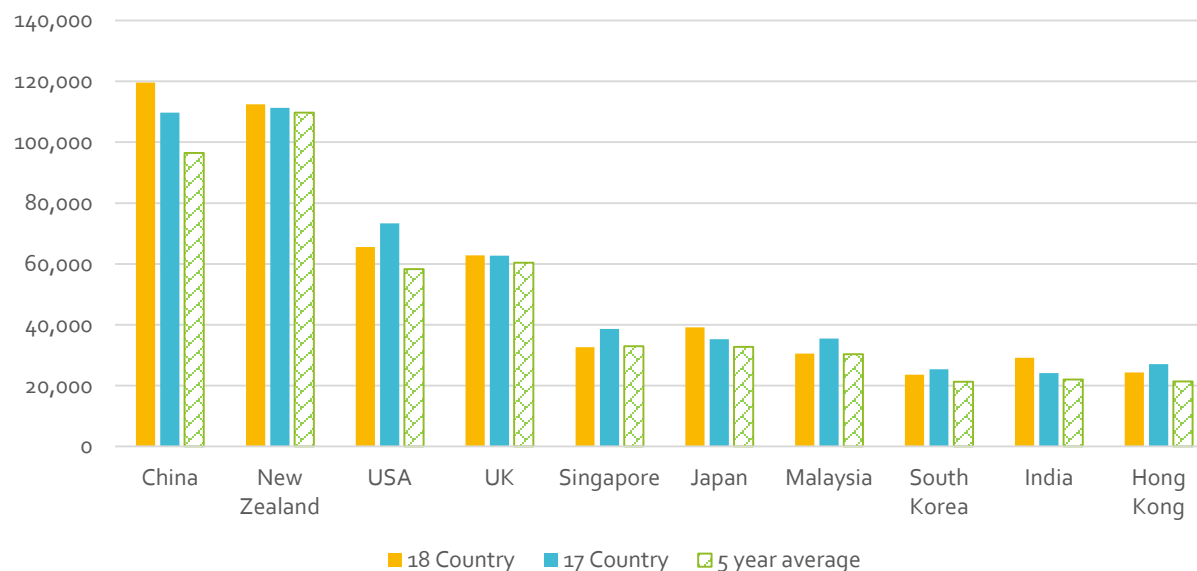
This section displays the performance of the major Australian source markets for international tourists comparing the month of May 2017 to May 2018.

### Key Highlights

**India is 7,100 movements above the 5 year average.**

**2018 USA arrivals for May are tracking at 2016 levels.**

Destination	Total number of travellers 2017	2017 Year end change	Total number of travellers 2018	2018 Year end change	2018 Performance
China	112,600	12.8%	125,600	11.5%	Positive
New Zealand	111,500	0.5%	113,700	2.0%	Neutral
USA	66,100	11.3%	62,300	-5.7%	Negative
UK	59,500	2.4%	61,900	4.0%	Positive
Singapore	39,500	7.6%	36,500	-7.6%	Negative
Japan	35,600	6.0%	38,200	7.3%	Positive
Malaysia	34,500	5.2%	28,600	-17.1%	Negative
South Korea	24,600	9.3%	24,300	-1.2%	Neutral
India	24,900	13.2%	30,000	20.5%	Positive
Hong Kong	24,300	26.6%	25,500	4.9%	Negative
National Total	733,800	8.2%	766,300	4.4%	Positive



Source: May 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 – May 2018

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

### Key Highlights

**Autumn departures average 5.3% for 2018.**

**In 2018 there were 102,740 more departures than the 5 year average.**

Month	Total number of travellers 2017	2017 Year end change	Total number of travellers 2018	2018 Year end change	2018 Performance
June	825,000	4.9%	873,400	5.9%	Positive
July	834,200	8.2%	871,000	4.4%	Positive
August	837,200	4.9%	878,200	4.9%	Positive
September	841,400	6.3%	888,600	5.6%	Positive
October	838,500	6.1%	887,100	5.8%	Positive
November	838,900	4.8%	890,000	6.1%	Positive
December	875,200	7.6%	876,700	0.2%	Neutral
January	851,800	5.4%	896,500	5.2%	Positive
February	894,800	12.3%	874,800	-2.2%	Negative
March	859,100	6.0%	912,700	6.2%	Positive
April	891,700	9.4%	927,700	4.0%	Positive
May	889,200	9.5%	938,800	5.6%	Positive
<b>Total</b>	<b>10,277,000</b>	<b>7.1%</b>	<b>10,715,500</b>	<b>4.3%</b>	<b>Positive</b>



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

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

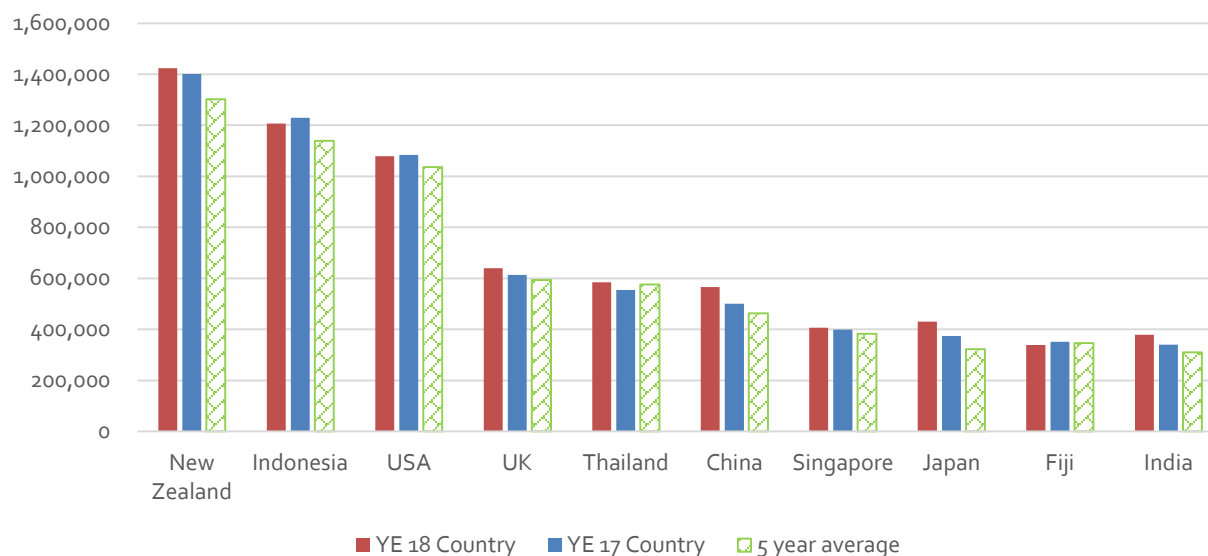
This section displays the performance of the major destinations Australian's are travelling to as of May Year end 2017 and 2018.

### Key Highlights

**The first time in more than five years that the top 3 markets have been rated as neutral.**

**Fiji is tracking at 2014 levels.**

Destination	Total number of travellers 2017	2017 Year end change	Total number of travellers 2018	2018 Year end change	2018 Performance
New Zealand	1,401,500	8.6%	1,423,700	1.6%	Neutral
Indonesia	1,229,600	8.6%	1,207,000	-1.8%	Neutral
USA	1,083,500	2.8%	1,078,400	-0.5%	Neutral
UK	613,300	3.4%	639,500	4.3%	Positive
Thailand	554,700	-0.4%	585,000	5.5%	Positive
China	500,100	12.7%	566,000	13.2%	Positive
Singapore	399,100	7.3%	406,000	1.7%	Neutral
Japan	374,100	14.3%	429,900	14.9%	Positive
Fiji	351,100	-0.5%	338,900	-3.5%	Negative
India	339,800	14.3%	379,300	11.6%	Positive
<b>National Total</b>	<b>10,277,000</b>	<b>7.1%</b>	<b>10,715,500</b>	<b>4.3%</b>	<b>Positive</b>



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

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

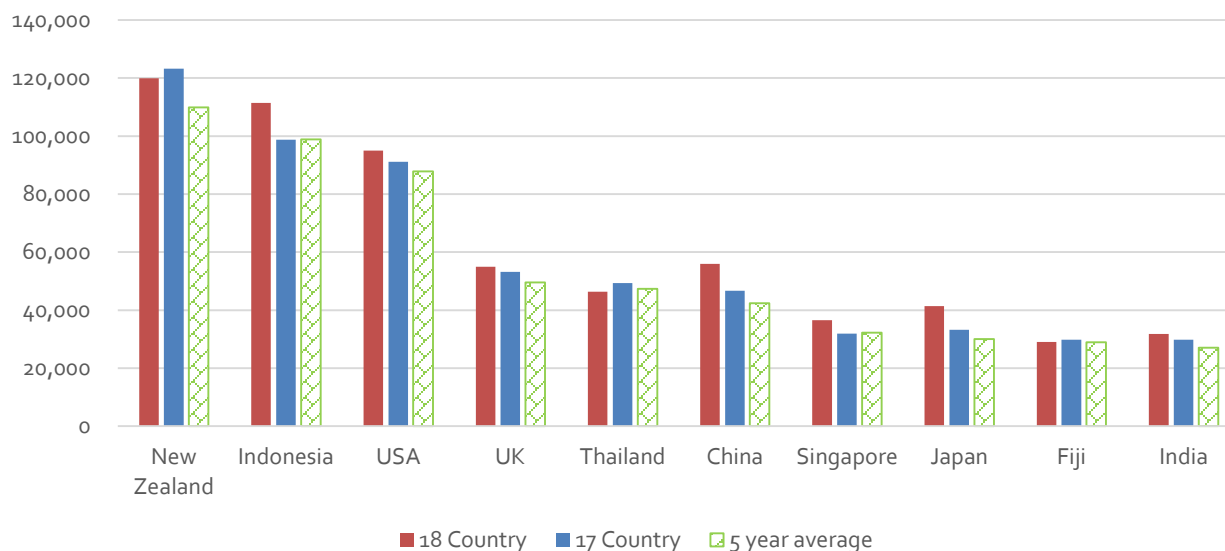
This section displays the performance of the major destinations Australian's are travelling to comparing May 2017 to May 2018

### Key Highlights

Average growth of Asian destinations is 12.1%.

All markets are 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
New Zealand	123,200	15.5%	119,900	-2.7%	Negative
Indonesia	98,800	-5.4%	111,400	12.8%	Positive
USA	91,100	2.6%	95,000	4.3%	Positive
UK	53,200	16.2%	55,000	3.4%	Positive
Thailand	49,400	5.3%	46,400	-6.1%	Negative
China	46,700	24.5%	56,000	19.9%	Positive
Singapore	31,900	0.3%	36,600	14.7%	Positive
Japan	33,200	13.7%	41,400	24.7%	Positive
Fiji	29,800	7.6%	29,100	-2.3%	Negative
India	29,800	19.2%	31,800	6.7%	Positive
<b>National Total</b>	<b>889,200</b>	<b>9.5%</b>	<b>938,800</b>	<b>5.6%</b>	<b>Positive</b>

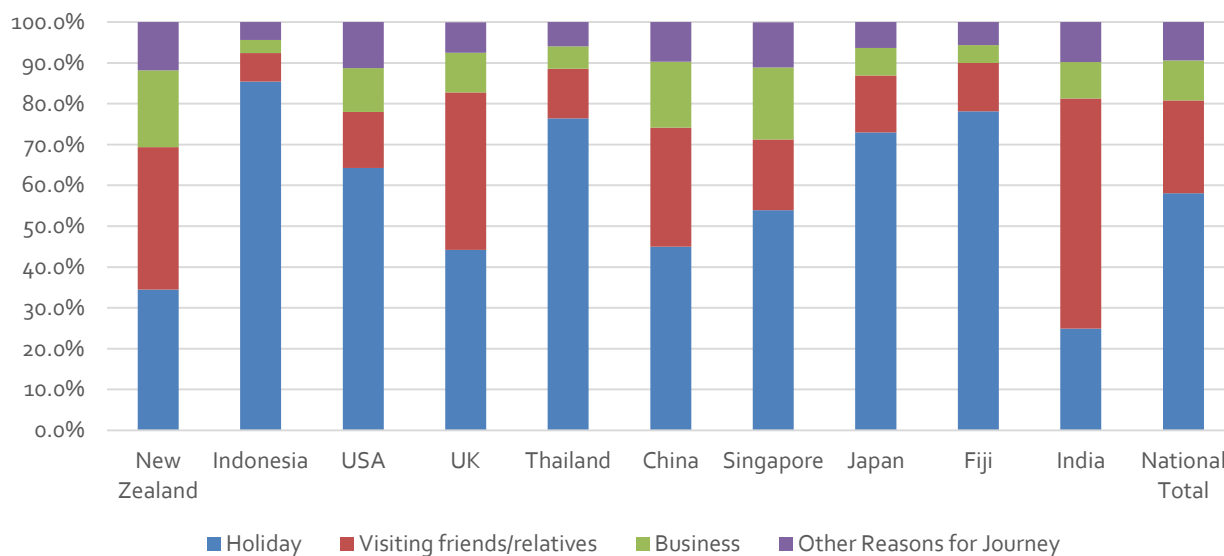


Source: May 2018 Short-term Movement, Residents Returning - Selected Destinations: Seasonally adjusted

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

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

	Holiday	Visiting friends/relatives	Business	Other Reasons for Journey
New Zealand	34.5%	34.9%	18.8%	11.8%
Indonesia	85.5%	6.9%	3.2%	4.4%
USA	64.2%	13.8%	10.8%	11.2%
UK	44.2%	38.6%	9.7%	7.5%
Thailand	76.4%	12.2%	5.5%	6.0%
China	45.0%	29.2%	16.1%	9.8%
Singapore	53.9%	17.3%	17.7%	11.1%
Japan	73.0%	13.9%	6.8%	6.3%
Fiji	78.2%	11.8%	4.4%	5.6%
India	24.9%	56.4%	8.9%	9.8%
<b>National Total</b>	<b>58.0%</b>	<b>22.7%</b>	<b>9.9%</b>	<b>9.4%</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 April 2018 (includes five dedicated freight airlines but excludes airlines operating only via code share arrangements).



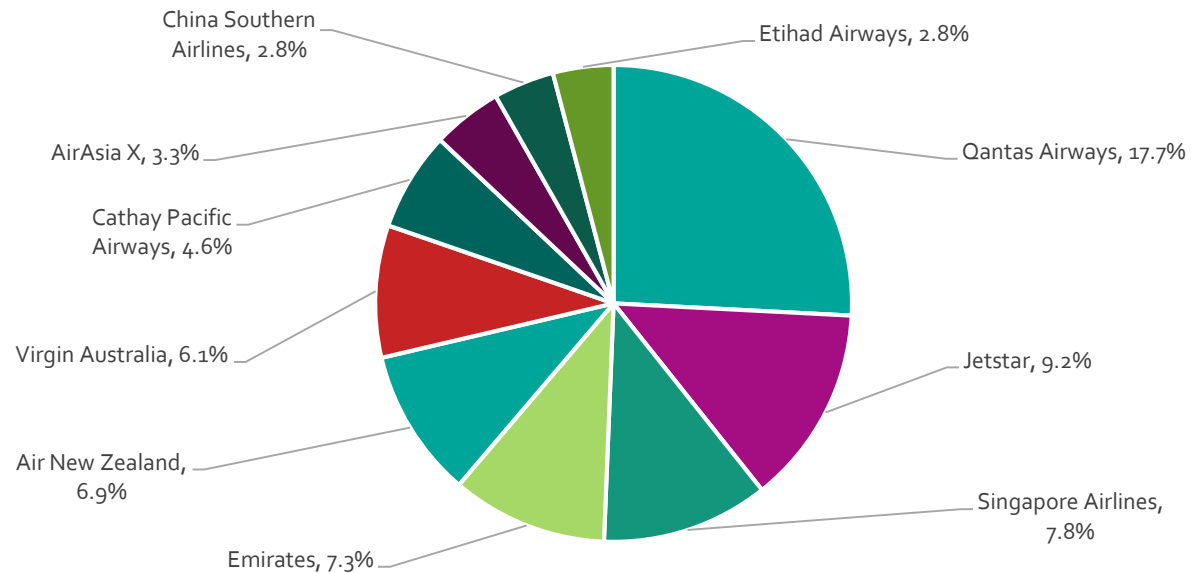
Source: International Airline Activity—Monthly Publications, April 2018

## Airline activity - Month End April 2018

This snapshot displays the market share of each airline for international travel for the month of April 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	April -17	April -18
<b>Qantas Airways</b>	16.5%	17.7%
<b>Jetstar</b>	8.9%	9.2%
<b>Singapore Airlines</b>	7.9%	7.8%
<b>Emirates</b>	8.3%	7.3%
<b>Air New Zealand</b>	6.7%	6.9%
<b>Virgin Australia</b>	5.8%	6.1%
<b>Cathay Pacific Airways</b>	5.0%	4.6%
<b>China Southern Airlines</b>	4.3%	3.3%
<b>AirAsia X</b>	2.7%	2.8%
<b>Etihad Airways</b>	3.2%	2.8%



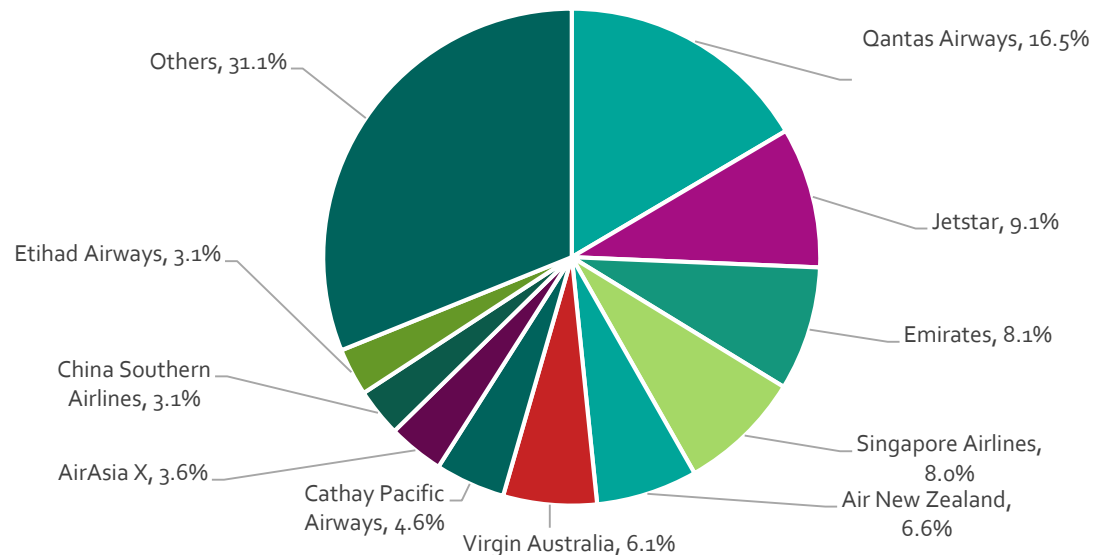
Source: International Airline Activity—Monthly Publications, April 2017 and April 2018

## Airline activity – Year End April 2018

This snapshot displays the market share of each airline for international travel of Year end – April 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	April - 17	Year End share of passengers carried	April - 18
<b>Qantas Airways</b>	15.8%	<b>Qantas Airways</b>	16.5%
<b>Jetstar</b>	9.3%	<b>Jetstar</b>	9.1%
<b>Emirates</b>	8.6%	<b>Emirates</b>	8.1%
<b>Singapore Airlines</b>	8.1%	<b>Singapore Airlines</b>	8.0%
<b>Air New Zealand</b>	6.6%	<b>Air New Zealand</b>	6.6%
<b>Virgin Australia</b>	6.0%	<b>Virgin Australia</b>	6.1%
<b>Cathay Pacific Airways</b>	4.7%	<b>Cathay Pacific Airways</b>	4.6%
<b>AirAsia X</b>	4.1%	<b>AirAsia X</b>	3.6%
<b>Etihad Airways</b>	3.2%	<b>China Southern Airlines</b>	3.1%
<b>China Southern Airlines</b>	2.9%	<b>Etihad Airways</b>	3.1%
<b>Others</b>	30.7%	<b>Others</b>	31.1%



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

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