

# AFTA Travel Trends

September 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 July 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 July 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 July 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.

	July YE 2017 Total number of international visitors to Australia <i>Inbound</i>	July YE 2017 Total number of international trips by Australians <i>Outbound</i>	July YE 2018 Total number of international visitors to Australia <i>Inbound</i>	July YE 2018 Total number of international trips by Australians <i>Outbound</i>
China	1,310,500	512,900	1,433,300	573,700
New Zealand	1,352,400	1,415,300	1,371,800	1,422,900
USA	770,400	1,086,300	785,200	1,080,900
UK	725,300	618,400	732,100	649,000
Singapore	436,600	402,300	433,000	412,200
Japan	430,000	380,300	446,000	445,900
Malaysia	399,300	268,900	392,400	266,200
South Korea	289,500	74,700	308,000	72,200
India	283,900	348,100	339,200	383,500
Hong Kong	264,300	218,500	301,800	237,200
Indonesia	185,100	1,217,800	196,100	1,210,300
Thailand	95,000	561,300	99,700	579,100
Fiji	39,200	351,200	45,100	337,800
<b>National Total</b>	<b>8,627,800</b>	<b>10,363,300</b>	<b>9,093,600</b>	<b>10,811,900</b>

Source: July 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 – July 2018

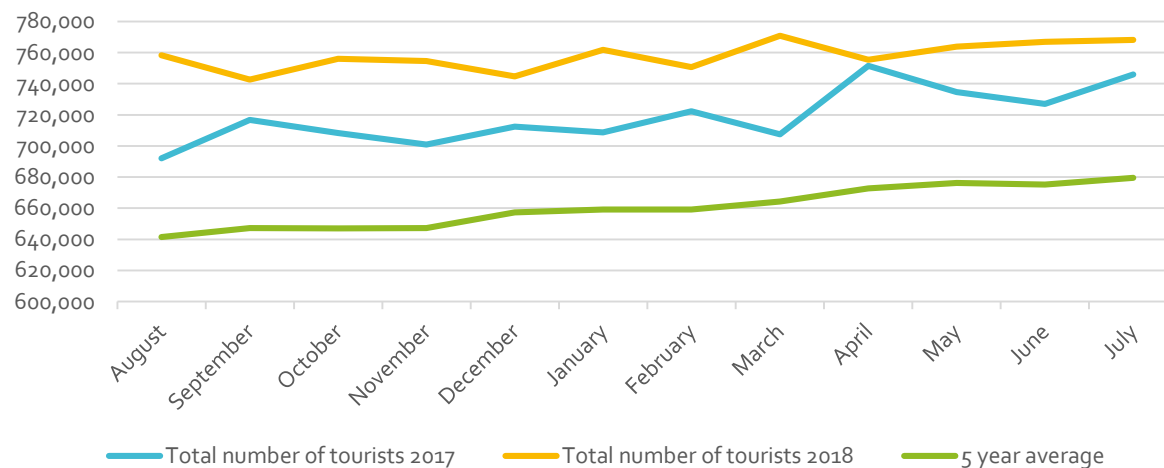
This section displays the number of international tourists travelling to Australia each month as of July Year end 2017 and 2018.

### Key Highlights

. July growth rate slows to 3%.

. Total growth rate slows further to lowest level in 5 years at 5.4%.

Month	Total number of travellers 2016 - 2017	Change on previous year	Total number of travellers 2017 - 2018	Change on previous year	2018 Performance
August	692,000	10.9%	758,200	9.6%	Positive
September	716,800	12.1%	742,700	3.6%	Positive
October	708,200	12.0%	756,100	6.8%	Positive
November	700,800	8.0%	754,600	7.7%	Positive
December	712,500	7.6%	744,600	4.5%	Positive
January	708,800	7.3%	761,800	7.5%	Positive
February	722,300	11.9%	750,700	3.9%	Positive
March	707,400	5.5%	770,900	9.0%	Positive
April	751,400	10.7%	755,300	0.5%	Neutral
May	734,600	8.3%	763,800	4.0%	Positive
June	727,000	4.6%	766,800	5.5%	Positive
July	746,000	7.4%	768,100	3.0%	Positive
Total	8,627,800	8.8%	9,093,600	5.4%	Positive



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

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

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

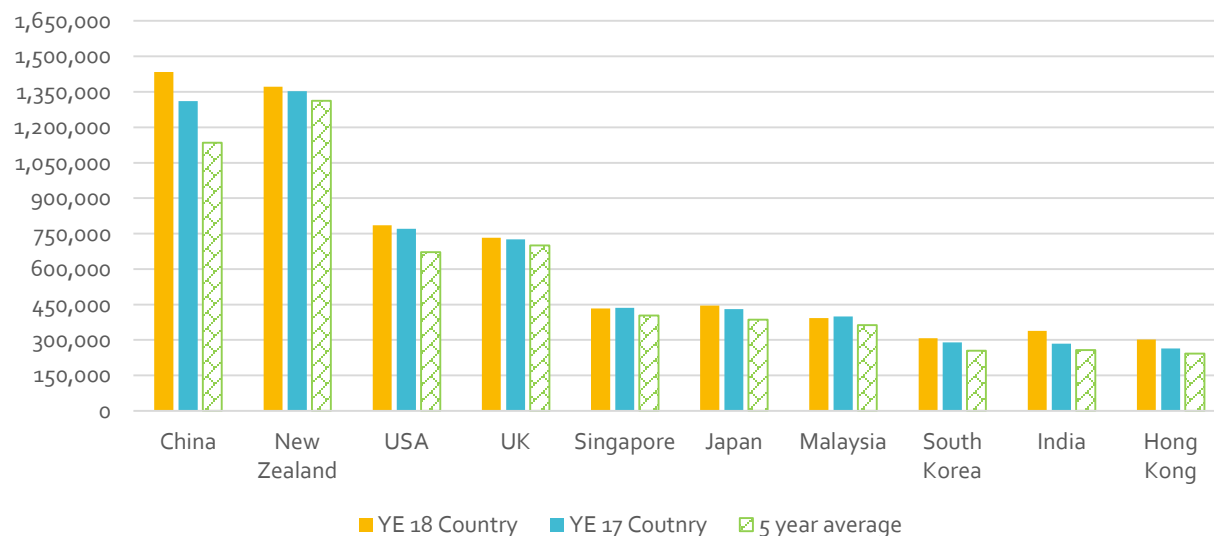
### Key Highlights

**. China arrivals continue strong growth significantly outperforming the 5 year average.**

**. No markets dropped below the 5 year average.**

**. India and Hong Kong growth rates continue to grow.**

Destination	Total number of travellers 2017	2017 Year end change	Total number of travellers 2018	2018 Year end change	2018 Performance
China	1,310,500	11.0%	1,433,300	9.4%	Positive
New Zealand	1,352,400	2.2%	1,371,800	1.4%	Neutral
USA	770,400	14.3%	785,200	1.9%	Neutral
UK	725,300	3.4%	732,100	0.9%	Neutral
Singapore	436,600	3.8%	433,000	-0.8%	Neutral
Japan	430,000	10.6%	446,000	3.7%	Positive
Malaysia	399,300	9.4%	392,400	-1.7%	Neutral
South Korea	289,500	10.8%	308,000	6.4%	Positive
India	283,900	16.2%	339,200	19.5%	Positive
Hong Kong	264,300	12.2%	301,800	14.2%	Positive
<b>National Total</b>	<b>8,627,800</b>	<b>8.8%</b>	<b>9,093,600</b>	<b>5.4%</b>	<b>Positive</b>



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

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

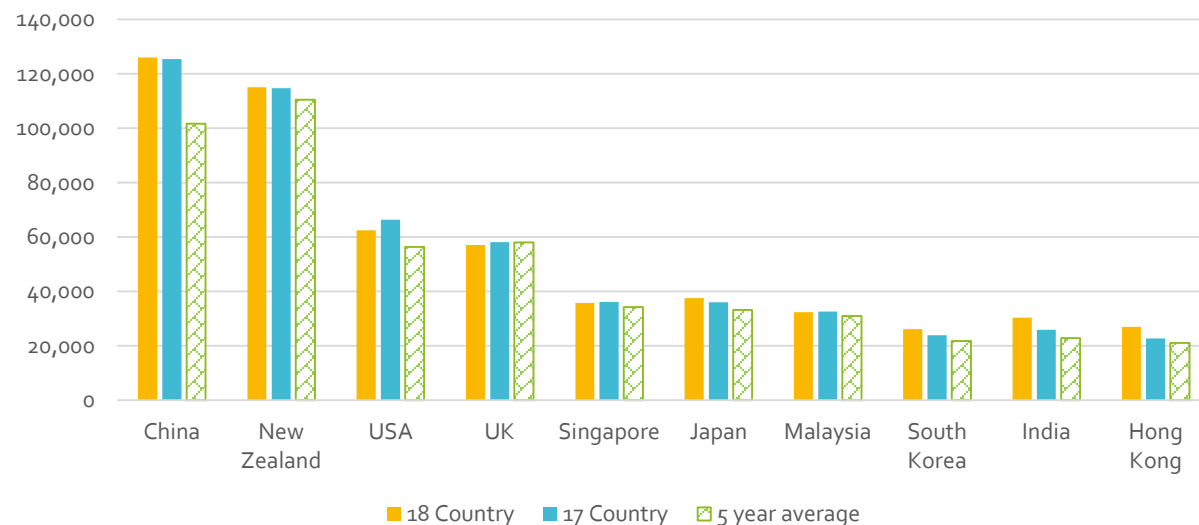
This section displays the performance of the major Australian source markets for international tourists comparing the month of July 2017 to July 2018.

### Key Highlights

. USA experiences second consecutive month of negative growth.

. China experiences second consecutive month of neutral growth.

Destination	Total number of travellers 2017	Change on previous year	Total number of travellers 2018	Change on previous year	2018 Performance
China	125,400	25.7%	126,000	0.5%	Neutral
New Zealand	114,700	2.2%	115,000	0.3%	Neutral
USA	66,300	9.6%	62,500	-5.7%	Negative
UK	58,100	-4.9%	57,100	-1.7%	Neutral
Singapore	36,100	0.3%	35,800	-0.8%	Neutral
Japan	36,000	5.9%	37,500	4.2%	Positive
Malaysia	32,600	-5.8%	32,400	-0.6%	Neutral
South Korea	23,900	-1.2%	26,100	9.2%	Positive
India	25,900	19.4%	30,400	17.4%	Positive
Hong Kong	22,700	9.7%	27,000	18.9%	Positive
National Total	746,000	7.4%	768,100	3.0%	Positive



Source: July 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 – July 2018

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

### Key Highlights

. Year end results tracking at a similar rate year on year.

. 5<sup>th</sup> consecutive month of volume exceeding 900k.

Month	Total number of travellers 2016 – 2017	Change on previous year	Total number of travellers 2017 - 2018	Change on previous year	2018 Performance
August	837,200	5.0%	876,100	4.6%	Positive
September	841,000	6.1%	890,100	5.8%	Positive
October	839,900	6.2%	889,700	5.9%	Positive
November	839,600	4.8%	888,300	5.8%	Positive
December	874,400	7.6%	876,900	0.3%	Neutral
January	853,000	5.5%	897,200	5.2%	Positive
February	894,300	12.2%	874,200	-2.2%	Negative
March	856,400	5.9%	913,200	6.6%	Positive
April	890,400	9.3%	926,000	4.0%	Positive
May	888,600	9.4%	935,900	5.3%	Positive
June	875,800	6.1%	918,100	4.8%	Positive
July	872,700	4.5%	926,200	6.1%	Positive
<b>Total</b>	<b>10,363,300</b>	<b>6.9%</b>	<b>10,811,900</b>	<b>4.3%</b>	<b>Positive</b>



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

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

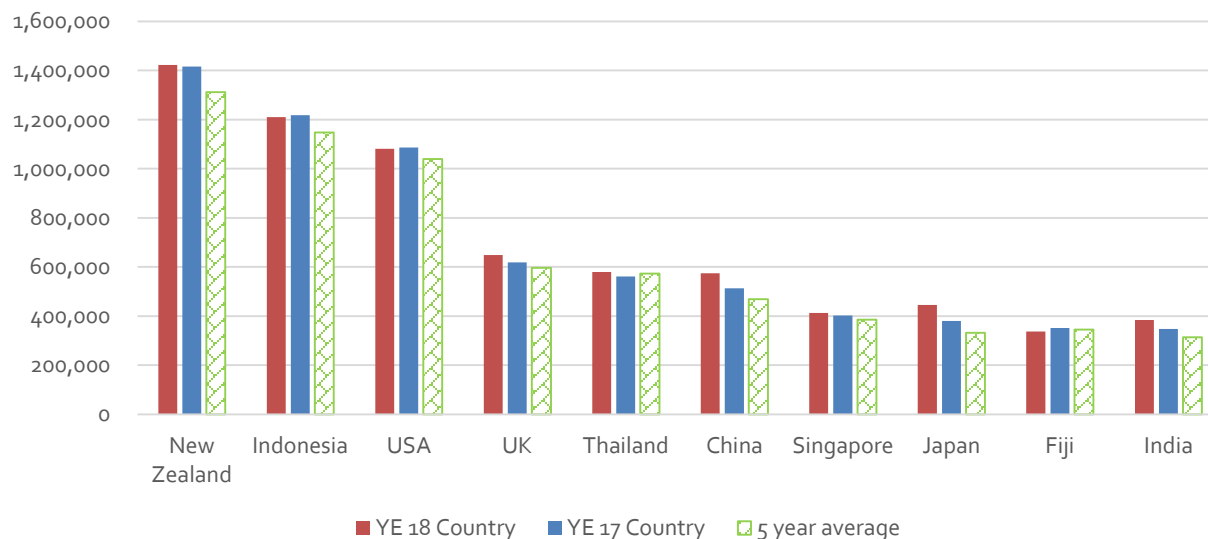
This section displays the performance of the major destinations Australian's are travelling to as of July Year end 2017 and 2018.

### Key Highlights

. Third consecutive month that top three destinations have been rated as neutral.

. Fiji continues to demonstrate negative growth against 2017 data and 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	1,415,300	9.0%	1,422,900	0.5%	Neutral
Indonesia	1,217,800	4.3%	1,210,300	-0.6%	Neutral
USA	1,086,300	2.4%	1,080,900	-0.5%	Neutral
UK	618,400	4.8%	649,000	4.9%	Positive
Thailand	561,300	1.4%	579,100	3.2%	Positive
China	512,900	14.2%	573,700	11.9%	Positive
Singapore	402,300	7.0%	412,200	2.5%	Neutral
Japan	380,300	11.8%	445,900	17.2%	Positive
Fiji	351,200	0.4%	337,800	-3.8%	Negative
India	348,100	15.5%	383,500	10.2%	Positive
<b>National Total</b>	<b>10,363,300</b>	<b>6.9%</b>	<b>10,811,900</b>	<b>4.3%</b>	<b>Positive</b>



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

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

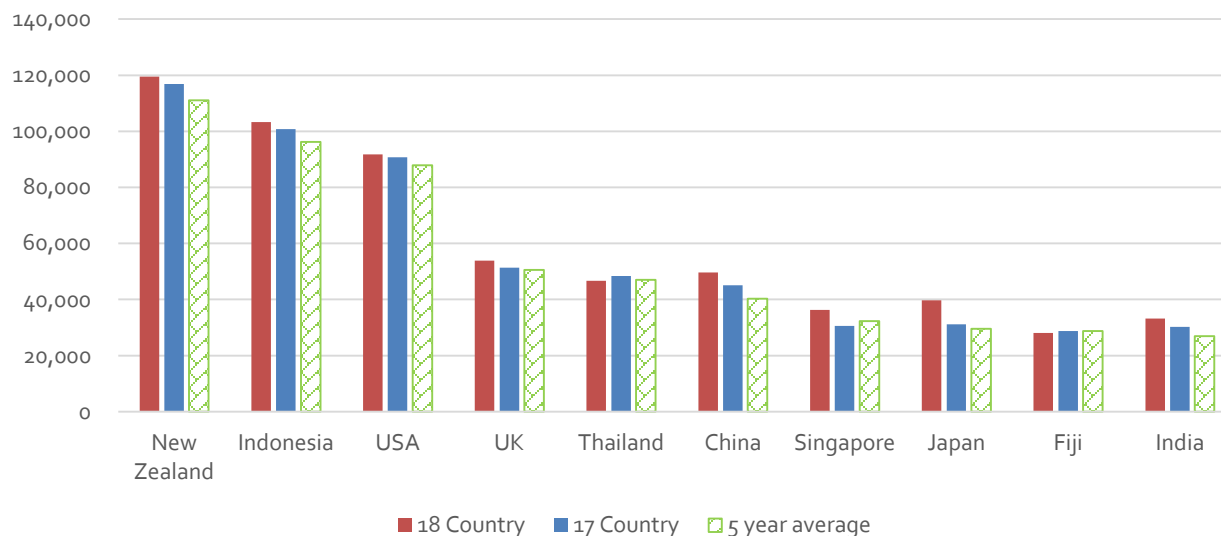
This section displays the performance of the major destinations Australian's are travelling to comparing July 2017 to July 2018

### Key Highlights

. Japan again demonstrates large growth of 27.7% compared to same period last year.

. New Zealand returns to positive growth following the negative growth last month.

Destination	Total number of travellers 2017	Change to previous year	Total number of travellers 2018	Change to previous year	2018 Performance
New Zealand	116,900	2.7%	119,500	2.2%	Positive
Indonesia	100,800	-3.5%	103,300	2.5%	Positive
USA	90,700	1.0%	91,800	1.2%	Neutral
UK	51,300	4.7%	53,900	5.1%	Positive
Thailand	48,400	5.9%	46,700	-3.5%	Negative
China	45,100	16.5%	49,600	10.0%	Positive
Singapore	30,600	-7.8%	36,300	18.6%	Positive
Japan	31,100	-1.6%	39,700	27.7%	Positive
Fiji	28,800	-1.0%	28,100	-2.4%	Negative
India	30,200	15.3%	33,200	9.9%	Positive
<b>National Total</b>	<b>872,700</b>	<b>4.5%</b>	<b>926,200</b>	<b>6.1%</b>	<b>Positive</b>

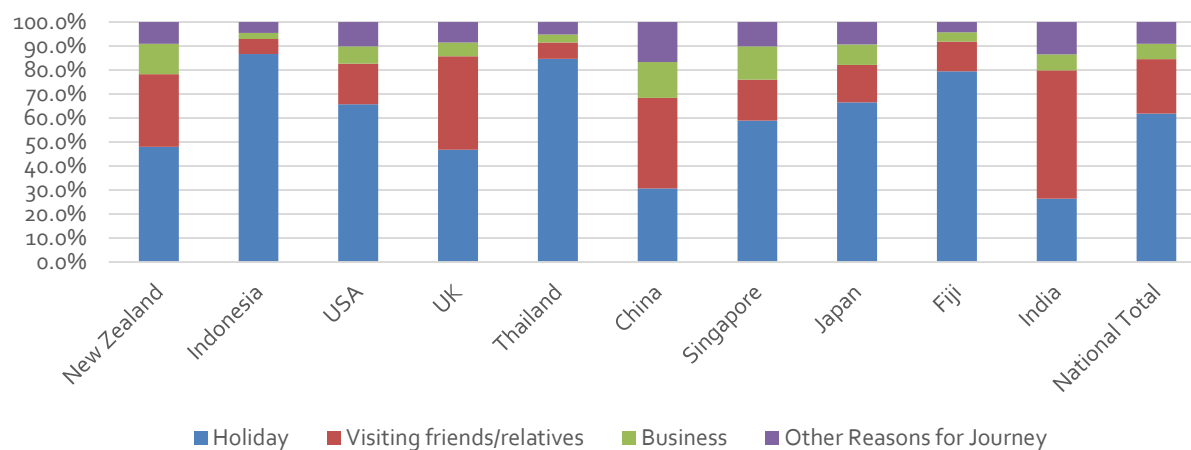


Source: July 2018 Short-term Movement, Residents Returning - Selected Destinations: Seasonally adjusted

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

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

	Holiday	Visiting friends/relatives	Business	Other Reasons for Journey
New Zealand	47.9%	30.3%	12.7%	9.1%
Indonesia	86.6%	6.3%	2.5%	4.6%
USA	65.8%	16.8%	7.2%	10.2%
UK	46.8%	38.9%	5.7%	8.5%
Thailand	84.7%	6.8%	3.3%	5.2%
China	30.7%	37.7%	15.0%	16.6%
Singapore	59.0%	17.0%	14.0%	10.1%
Japan	66.5%	15.6%	8.6%	9.3%
Fiji	79.5%	12.4%	3.8%	4.3%
India	26.4%	53.5%	6.7%	13.4%
<b>National Total</b>	<b>61.8%</b>	<b>22.6%</b>	<b>6.5%</b>	<b>9.0%</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 June 2018 (includes five dedicated freight airlines but excludes airlines operating only via code share arrangements).



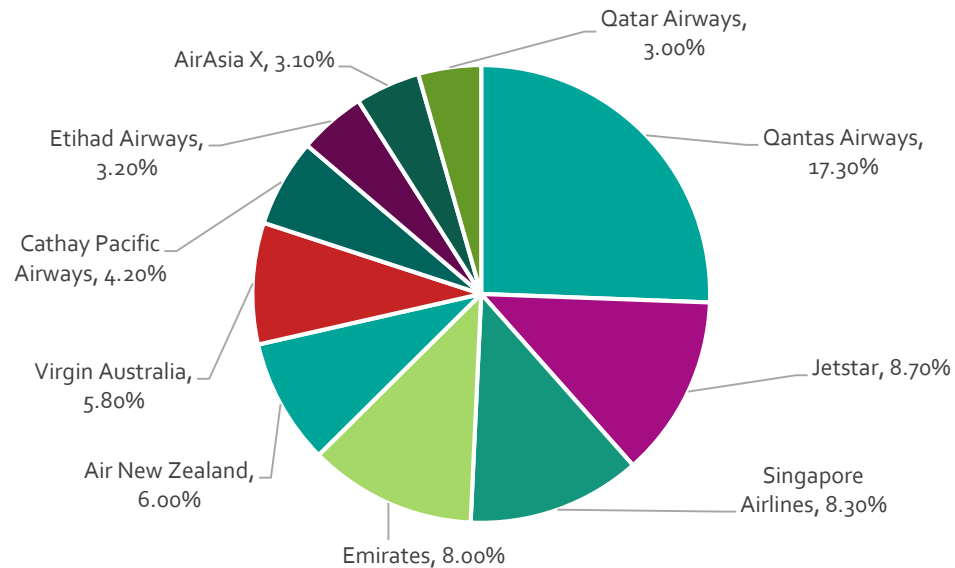
Source: International Airline Activity—Monthly Publications, June 2018

## Airline activity - Month End June 2018

This snapshot displays the market share of each airline for international travel for the month of June 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	June -17	June -18
<b>Qantas Airways</b>	16.2%	17.3%
<b>Jetstar</b>	9.3%	8.7%
<b>Singapore Airlines</b>	8.4%	8.3%
<b>Emirates</b>	8.4%	8.0%
<b>Air New Zealand</b>	6.1%	6.0%
<b>Virgin Australia</b>	5.9%	5.8%
<b>Cathay Pacific Airways</b>	4.6%	4.2%
<b>Etihad Airways</b>	3.2%	3.2%
<b>AirAsia X</b>	4.2%	3.1%
<b>Qatar Airways</b>	2.1%	3.0%



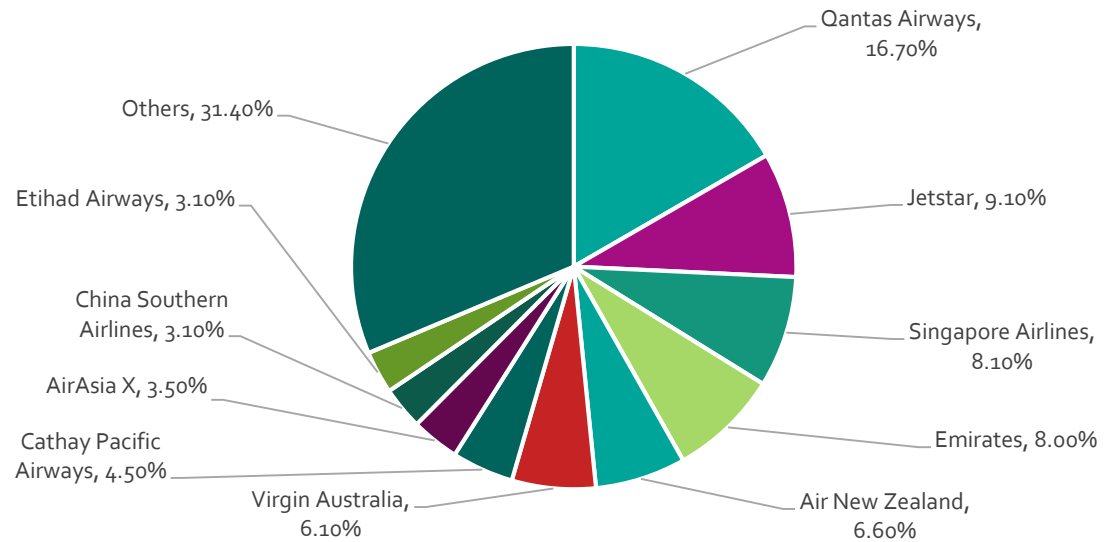
Source: International Airline Activity—Monthly Publications, June 2017 and June 2018

## Airline activity – Year End June 2018

This snapshot displays the market share of each airline for international travel of Year end – June 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	June - 17	Year End share of passengers carried	June - 18
Qantas Airways	15.9%	Qantas Airways	16.7%
Jetstar	9.2%	Jetstar	9.1%
Emirates	8.5%	Singapore Airlines	8.1%
Singapore Airlines	8.1%	Emirates	8.0%
Air New Zealand	6.6%	Air New Zealand	6.6%
Virgin Australia	6.0%	Virgin Australia	6.1%
Cathay Pacific Airways	4.7%	Cathay Pacific Airways	4.5%
AirAsia X	4.2%	AirAsia X	3.5%
Etihad Airways	3.2%	China Southern Airlines	3.1%
China Southern Airlines	2.9%	Etihad Airways	3.1%
Others	30.7%	Others	31.4%



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

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