

AFTA Travel Trends

December 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 October 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 October 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 October 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.

	October YE 2017 Total number of international visitors to Australia <i>Inbound</i>	October YE 2017 Total number of international trips by Australians <i>Outbound</i>	October YE 2018 Total number of international visitors to Australia <i>Inbound</i>	October YE 2018 Total number of international trips by Australians <i>Outbound</i>
China	1,365,900	532,600	1,439,400	588,300
New Zealand	1,355,800	1,428,500	1,380,500	1,424,400
USA	774,600	1,087,000	784,800	1,084,900
UK	718,400	628,600	740,300	657,000
Singapore	441,700	404,200	442,200	421,800
Japan	432,000	391,900	460,300	458,100
Malaysia	403,600	269,600	399,600	266,300
South Korea	295,800	74,500	296,100	73,500
India	295,800	359,300	350,000	390,800
Hong Kong	278,500	220,200	305,300	244,500
Indonesia	295,800	1,206,800	350,000	1,236,400
Thailand	98,000	570,400	99,300	578,800
Fiji	41,500	347,500	45,300	340,800
National Total	8,721,500	10,500,600	9,194,900	10,947,600

Source: October 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 – October 2018

This section displays the number of international tourists travelling to Australia each month.

Key Highlights

- During October 2018, short-term visitor arrivals (780,000 movements) increased 1.1% when compared with September 2018 (772,600 movements).
- This followed a monthly increase of 2.6% for August 2018 and a monthly decrease of 2.4% for September 2018.

Month	Total number of travellers 2016 - 2017	Change on previous year	Total number of travellers 2017 - 2018	Change on previous year	2018 Performance
November	701,500	8.0%	755,100	7.6%	Positive
December	712,500	7.6%	744,500	4.5%	Positive
January	710,900	7.4%	762,900	7.3%	Positive
February	723,100	11.9%	751,700	4.0%	Positive
March	707,400	5.3%	772,900	9.3%	Positive
April	752,400	10.9%	755,600	0.4%	Neutral
May	733,400	8.2%	764,800	4.3%	Positive
June	726,400	4.5%	770,800	6.1%	Positive
July	746,800	7.6%	771,700	3.3%	Positive
August	750,700	9.1%	791,500	5.4%	Positive
September	745,500	4.0%	772,600	3.6%	Positive
October	758,200	6.8%	780,800	3.0%	Positive
Total	8,768,800	7.6%	9,194,900	4.9%	Positive



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

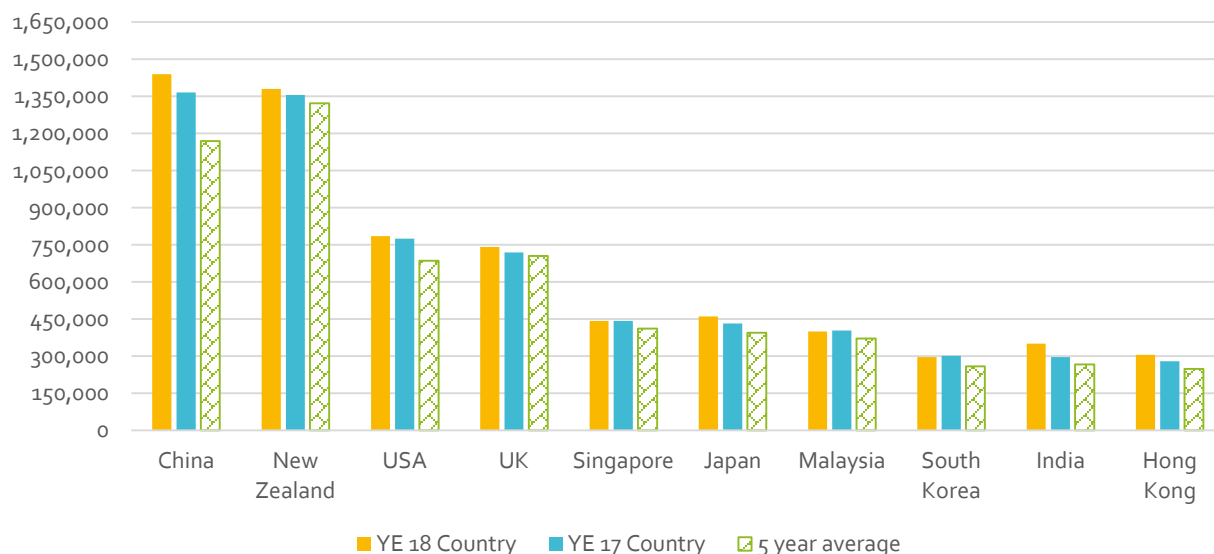
Year end changes to top Australian source markets – October 2018

This section displays the performance of the major Australian source markets for international travellers for 12 month period ending October 2017 and 2018.

Key Highlights

- India and Hong Kong continue with strongest positive growth when comparing the same periods.
- China's growth remains highest in actual volume with 5.4% increase representing an increase of 73,500 visitors.
- Total growth rate slows to lowest level in 5 years at 4.9%.

Destination	Total number of travellers 2017	2017 Year end change	Total number of travellers 2018	2018 Year end change	2018 Performance
China	1,365,900	13.0%	1,439,400	5.4%	Positive
New Zealand	1,355,800	1.7%	1,380,500	1.8%	Neutral
USA	774,600	9.7%	784,800	1.3%	Neutral
UK	718,400	1.1%	740,300	3.0%	Positive
Singapore	441,700	2.9%	442,200	0.1%	Neutral
Japan	432,000	6.2%	460,300	6.6%	Positive
Malaysia	403,600	5.1%	399,600	-1.0%	Neutral
South Korea	300,500	8.5%	296,100	-1.5%	Neutral
India	295,800	15.7%	350,000	18.3%	Positive
Hong Kong	278,500	16.0%	305,300	9.6%	Positive
National Total	8,768,800	7.6%	9,194,900	4.9%	Positive



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

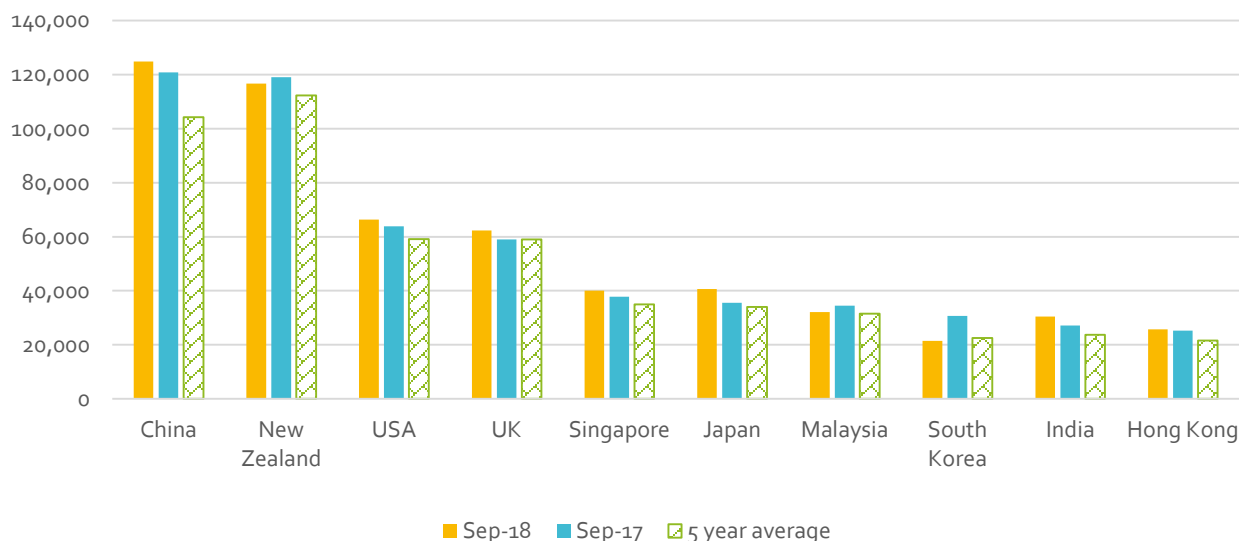
Monthly changes to top Australian source markets – October 2018

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

Key Highlights

- On a month to month comparison, South Korea has the largest decrease of 30% or 9,200 passengers.
- South Korea volume of 21,500 also dips below the 5 year average of 22,560.
- The largest increase has been Japan with 14% or 5,000 passengers.

Destination	Total number of travellers 2017	Change on previous year	Total number of travellers 2018	Change on previous year	2018 Performance
China	120,800	14.0%	124,800	3.3%	Positive
New Zealand	119,000	7.1%	116,700	-1.9%	Neutral
USA	63,900	4.6%	66,300	3.8%	Positive
UK	59,000	-3.8%	62,300	5.6%	Positive
Singapore	37,800	11.5%	40,100	6.1%	Positive
Japan	35,600	-0.8%	40,600	14.0%	Positive
Malaysia	34,500	-6.0%	32,100	-7.0%	Negative
South Korea	30,700	28.5%	21,500	-30.0%	Negative
India	27,200	17.7%	30,500	12.1%	Positive
Hong Kong	25,300	21.6%	25,700	1.6%	Neutral
National Total	758,200	6.8%	780,800	3.0%	Positive



Source: October 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 – October 2018

This section displays the number of Australians travelling outbound for each month.

Key Highlights

- During October 2018, short-term resident returns (943,300 movements) increased 2.4% when compared with September 2018 (921,200 movements).
- This followed a monthly increase of 1.5% for August 2018 and a monthly decrease of 1.7% for September 2018.

Month	Total number of travellers 2016 – 2017	Change on previous year	Total number of travellers 2017 - 2018	Change on previous year	2018 Performance
October	838,700	4.7%	887,400	5.8%	Positive
November	873,900	7.6%	878,100	0.5%	Neutral
December	854,400	5.4%	895,300	4.8%	Positive
January	894,500	12.4%	874,100	-2.3%	Negative
February	854,800	5.8%	912,800	6.8%	Positive
March	891,600	9.6%	924,700	3.7%	Positive
April	885,500	9.0%	934,800	5.6%	Positive
May	873,400	6.0%	914,600	4.7%	Positive
June	871,400	4.4%	923,800	6.0%	Positive
July	877,600	4.9%	937,500	6.8%	Positive
August	896,100	6.1%	921,200	2.8%	Positive
September	888,700	5.8%	943,300	6.1%	Positive
Total	10,500,600	6.8%	10,947,600	4.3%	Positive



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

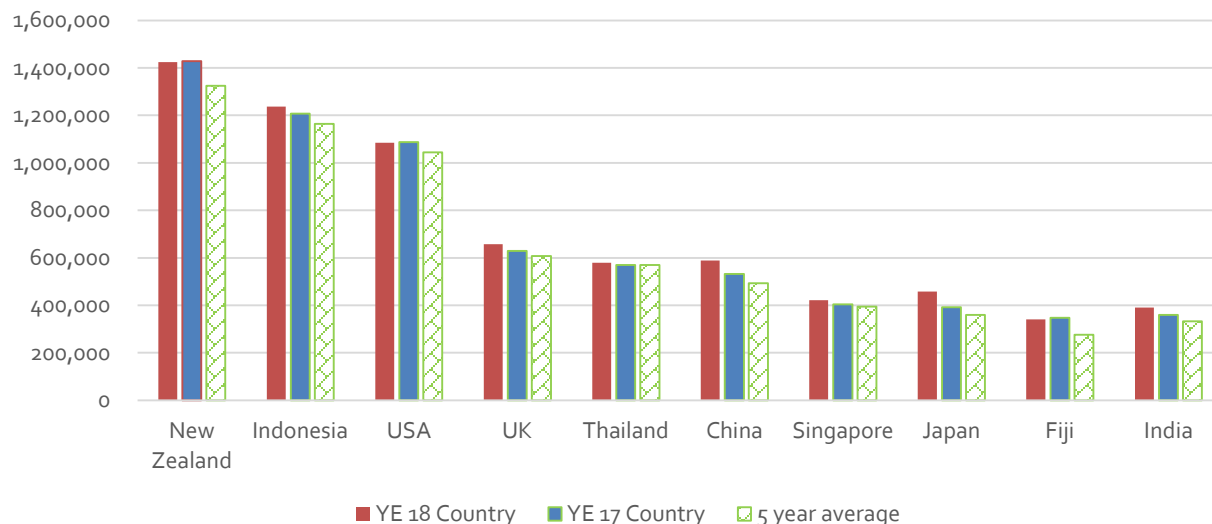
Year end changes to popular international destinations travelled to by Australian's – October 2018

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

Key Highlights

- Japan continues to show high positive growth of 16.9% or 66,200 more passengers comparing the same 12 month period.
- No destinations have reported negative growth with these destinations continuing to remain popular with Australians.

Destination	Total number of travellers 2017	2017 Year end change	Total number of travellers 2018	2018 Year end change	2018 Performance
New Zealand	1,428,500	7.9%	1,424,400	-0.3%	Neutral
Indonesia	1,206,800	0.2%	1,236,400	2.5%	Positive
USA	1,087,000	2.3%	1,084,900	-0.2%	Neutral
UK	628,600	7.9%	657,000	4.5%	Positive
Thailand	570,400	3.9%	578,800	1.5%	Neutral
China	532,600	16.8%	588,300	10.5%	Positive
Singapore	404,200	6.6%	421,800	4.4%	Positive
Japan	391,900	11.0%	458,100	16.9%	Positive
Fiji	347,500	-0.4%	340,800	-1.9%	Neutral
India	359,300	14.2%	390,800	8.8%	Positive
National Total	10,500,600	6.8%	10,947,600	4.3%	Positive



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

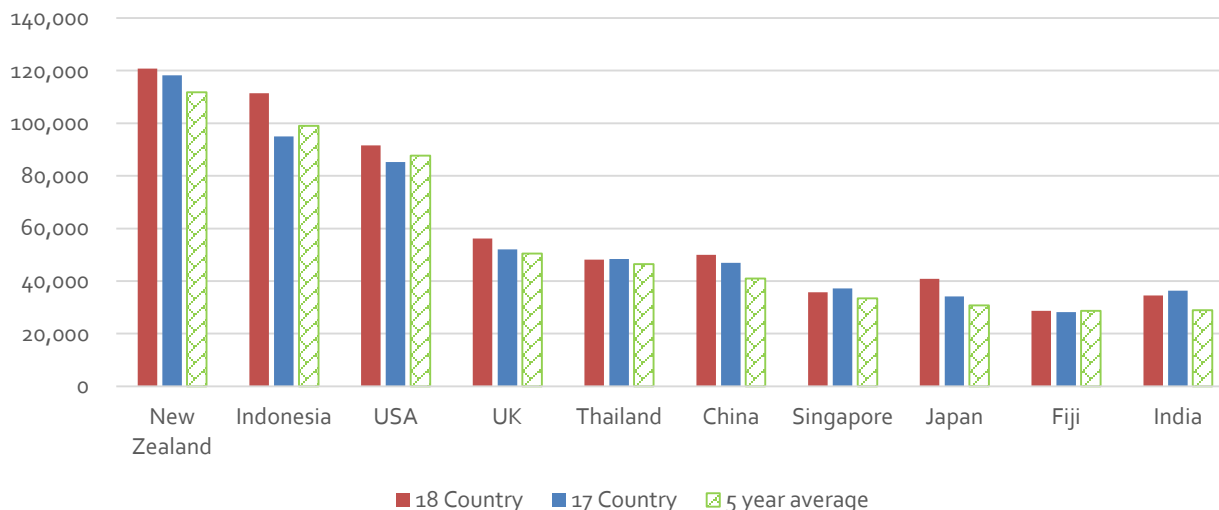
Monthly changes to popular international destinations travelled to by Australian's – October 2018

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

Key Highlights

- Singapore and India showed negative growth when comparing October 2018 to October 2017.
- Japan had the highest percentage growth of 19.3% or 6,600 more Australians visiting Japan in October.
- Whilst Indonesia had the second highest percentage growth of 17.3%, the actual volume increased by 16,400 passengers.

Destination	Total number of travellers 2017	Change to previous year	Total number of travellers 2018	Change to previous year	2018 Performance
New Zealand	118,200	-0.5%	120,800	2.2%	Positive
Indonesia	95,000	-6.7%	111,400	17.3%	Positive
USA	85,200	-4.6%	91,600	7.5%	Positive
UK	52,000	6.6%	56,200	8.1%	Positive
Thailand	48,400	6.1%	48,200	-0.4%	Neutral
China	46,900	22.5%	50,000	6.6%	Positive
Singapore	37,200	11.4%	35,700	-4.0%	Negative
Japan	34,200	11.0%	40,800	19.3%	Positive
Fiji	28,200	-5.7%	28,700	1.8%	Neutral
India	36,400	42.2%	34,500	-5.2%	Negative
National Total	888,700	5.8%	943,300	6.1%	Positive

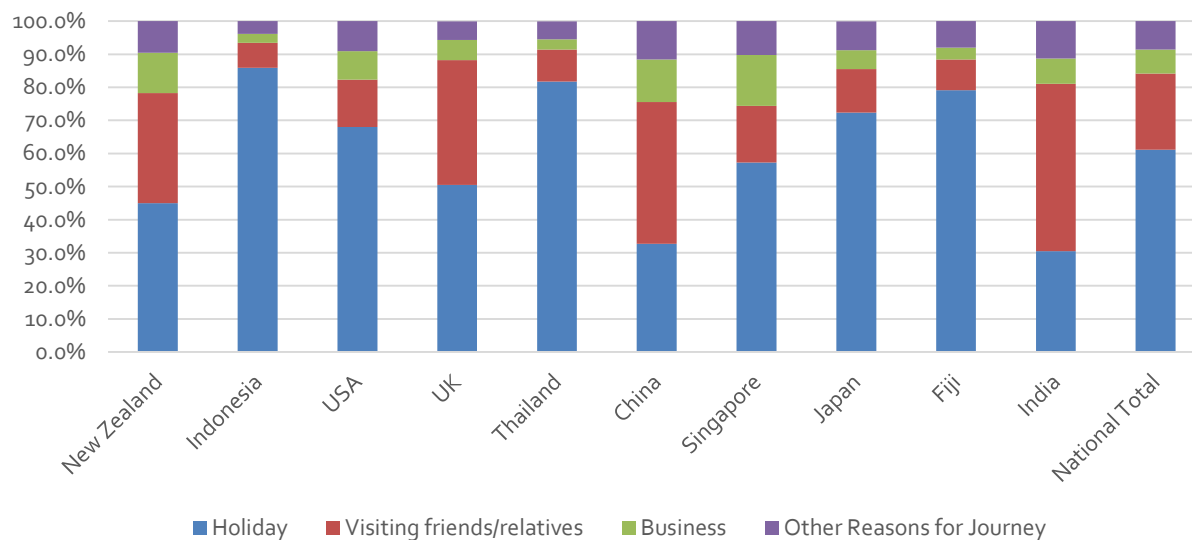


Source: October 2018 Short-term Movement, Residents Returning - Selected Destinations: Seasonally adjusted

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

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

	Holiday	Visiting friends/relatives	Business	Other Reasons for Journey
New Zealand	45.0%	33.3%	12.2%	9.5%
Indonesia	86.0%	7.5%	2.7%	3.9%
USA	68.0%	14.3%	8.6%	9.0%
UK	50.5%	37.7%	6.1%	5.7%
Thailand	81.8%	9.6%	3.2%	5.4%
China	32.7%	42.9%	12.9%	11.5%
Singapore	57.3%	17.1%	15.3%	10.2%
Japan	72.4%	13.2%	5.6%	8.8%
Fiji	79.1%	9.2%	3.6%	8.0%
India	30.4%	50.7%	7.6%	11.3%
National Total	61.1%	23.1%	7.3%	8.5%



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



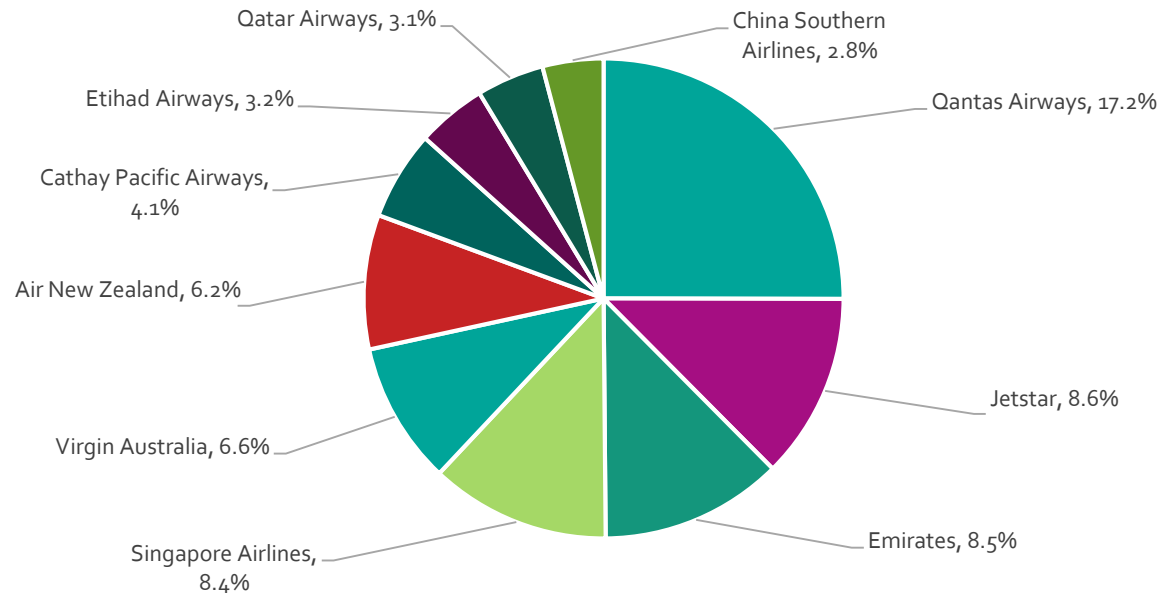
Source: International Airline Activity—Monthly Publications, September 2018

Airline activity - Month End September 2018

This snapshot displays the market share of each airline for international travel for the month of September 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	September -17	September-18
Qantas Airways	16.5%	17.2%
Jetstar	9.2%	8.6%
Emirates	8.5%	8.5%
Singapore Airlines	8.5%	8.4%
Virgin Australia	6.4%	6.6%
Air New Zealand	6.2%	6.2%
Cathay Pacific Airways	4.4%	4.1%
Etihad Airways	3.5%	3.2%
Qatar Airways	2.6%	3.1%
China Southern Airlines	2.7%	2.8%



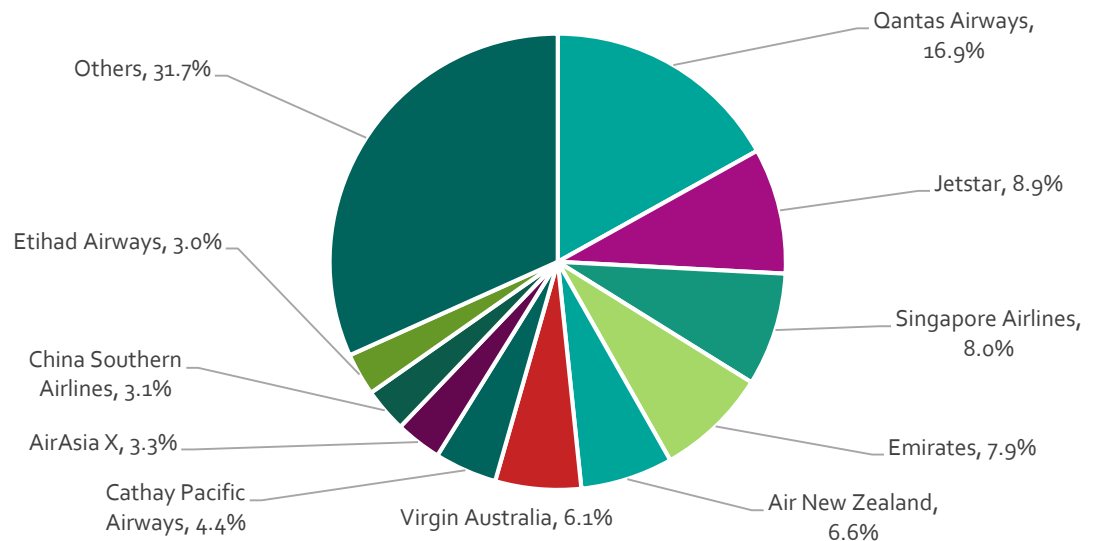
Source: International Airline Activity—Monthly Publications, September 2017 and September 2018

Airline activity – Year End September 2018

This snapshot displays the market share of each airline for international travel of Year end – September 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	September - 17	Year End share of passengers carried	September - 18
Qantas Airways	16.1%	Qantas Airways	16.9%
Jetstar	9.2%	Jetstar	8.9%
Emirates	8.4%	Singapore Airlines	8.0%
Singapore Airlines	8.1%	Emirates	7.9%
Air New Zealand	6.6%	Air New Zealand	6.6%
Virgin Australia	6.1%	Virgin Australia	6.1%
Cathay Pacific Airways	4.6%	Cathay Pacific Airways	4.4%
AirAsia X	4.1%	AirAsia X	3.3%
Etihad Airways	3.2%	China Southern Airlines	3.1%
China Southern Airlines	3.0%	Etihad Airways	3.0%
Others	30.6%	Others	31.7%



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

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