

# AFTA Travel Trends

January 2019



# Inbound and Outbound overview

## Introduction

This snapshot provides an overview of the balance of trade between Inbound and Outbound Travel for Year end of November 2019.

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 November 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 November 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.

	November YE 2017 Total number of international visitors to Australia <i>Inbound</i>	November YE 2017 Total number of international trips by Australians <i>Outbound</i>	November YE 2018 Total number of international visitors to Australia <i>Inbound</i>	November YE 2018 Total number of international trips by Australians <i>Outbound</i>
China	1,373,700	538,800	1,438,500	589,400
New Zealand	1,360,100	1,437,800	1,381,600	1,430,400
USA	781,600	1,079,900	783,700	1,086,700
UK	724,800	629,000	735,100	658,500
Singapore	443,700	410,800	444,900	412,400
Japan	433,700	398,300	463,400	461,800
Malaysia	402,700	272,700	402,700	263,200
South Korea	299,300	73,500	292,600	74,700
India	299,300	359,300	354,500	395,700
Hong Kong	282,400	222,700	307,100	244,800
Indonesia	299,300	1,199,200	354,500	1,254,400
Thailand	98,000	576,400	99,200	575,700
Fiji	42,000	346,000	45,300	343,600
<b>National Total</b>	<b>8,823,100</b>	<b>10,552,000</b>	<b>9,214,000</b>	<b>10,993,200</b>

Source: November 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 – November 2018

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

### Key Highlights

- During November 2018, short-term visitor arrivals (778,200 movements) decreased 0.1% when compared with October 2018 (779,200 movements).
- This followed a monthly decrease of 2.6% for September 2018 and a monthly increase of 1.1% for October 2018.

Month	Total number of travellers 2016 - 2017	Change on previous year	Total number of travellers 2017 - 2018	Change on previous year	2018 Performance
December	713,200	7.7%	744,400	4.4%	Positive
January	710,400	7.4%	762,600	7.3%	Positive
February	723,600	11.9%	751,500	3.9%	Positive
March	707,800	5.4%	773,800	9.3%	Positive
April	751,500	10.7%	756,000	0.6%	Neutral
May	733,000	8.1%	764,600	4.3%	Positive
June	727,200	4.8%	770,300	5.9%	Positive
July	745,100	7.5%	771,100	3.5%	Positive
August	749,900	9.1%	791,500	5.5%	Positive
September	745,500	3.9%	770,800	3.4%	Positive
October	757,700	6.8%	779,200	2.8%	Positive
November	758,200	7.8%	778,200	2.6%	Positive
Total	8,823,100	7.6%	9,214,000	4.4%	Positive



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

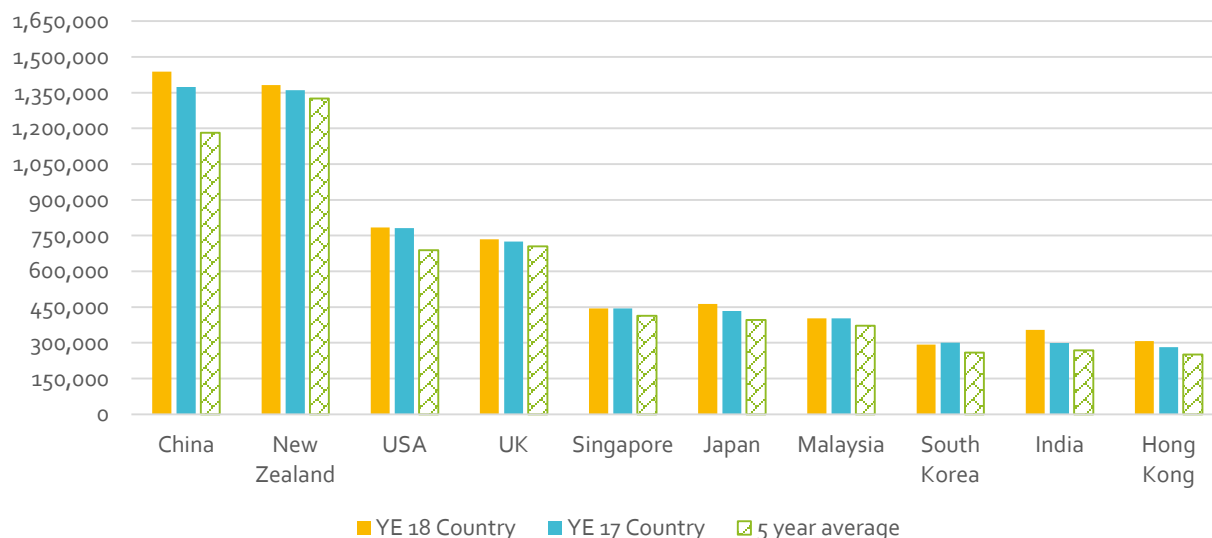
## Year end changes to top Australian source markets – November 2018

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

### Key Highlights

- **South Korea dips from Neutral into Negative with -2.8%** however this is skewed as **October 2017 saw South Korea have a 10-year high with 30,400 visitors.**
- **UK drops from a Positive position of 3% in October down to a neutral position of 1.4%.**

Destination	Total number of travellers 2017	2017 Year end change	Total number of travellers 2018	2018 Year end change	2018 Performance
China	1,373,700	12.7%	1,438,500	4.7%	Positive
New Zealand	1,360,100	1.9%	1,381,600	1.6%	Neutral
USA	781,600	9.7%	783,700	0.3%	Neutral
UK	724,800	1.9%	735,100	1.4%	Neutral
Singapore	443,700	3.6%	444,900	0.3%	Neutral
Japan	433,700	5.3%	463,400	6.8%	Positive
Malaysia	402,700	3.7%	402,700	0.0%	Neutral
South Korea	301,100	7.3%	292,600	-2.8%	Negative
India	299,300	15.3%	354,500	18.4%	Positive
Hong Kong	282,400	16.9%	307,100	8.7%	Positive
<b>National Total</b>	<b>8,823,100</b>	<b>7.6%</b>	<b>9,214,000</b>	<b>4.4%</b>	<b>Positive</b>



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

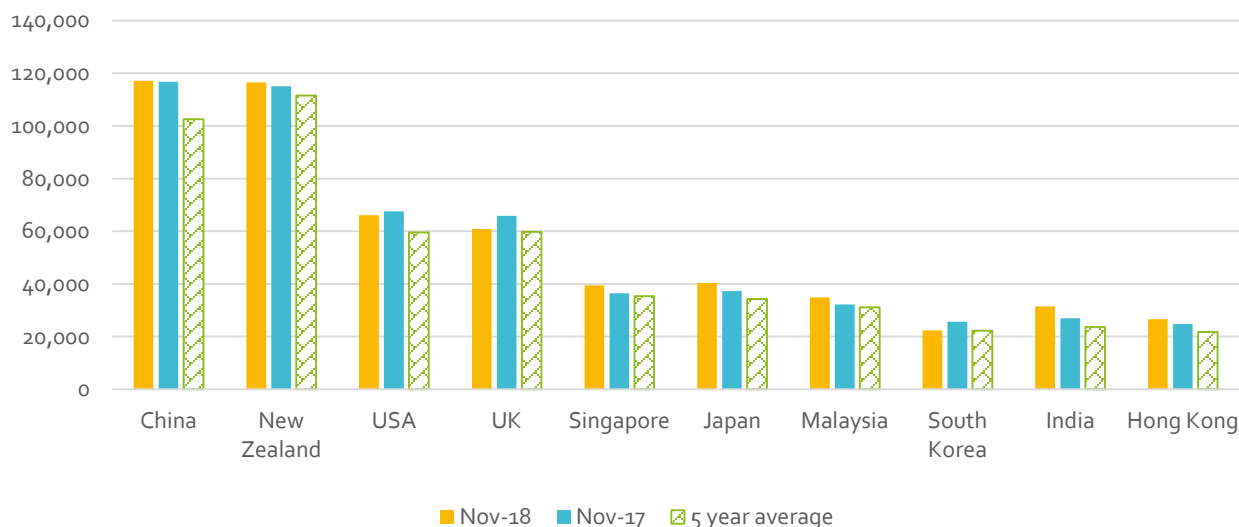
## Monthly changes to top Australian source markets – November 2018

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

### Key Highlights

- **China drops from a Positive 3.3% down to 0.3% neutral position and recorded it's lowest volume in 10 months of 117,100 visitors.**
- **Malaysia records a large swing from -7% Negative in October to 8.4% Positive in November following an increase from 32,100 in October up to 34,900 in November.**
- **USA and UK both drop from Positive to Negative positions.**

Destination	Total number of travellers 2017	Change on previous year	Total number of travellers 2018	Change on previous year	2018 Performance
China	116,700	8.4%	117,100	0.3%	Neutral
New Zealand	115,100	3.6%	116,500	1.2%	Neutral
USA	67,600	11.7%	66,100	-2.2%	Negative
UK	65,800	11.1%	60,900	-7.4%	Negative
Singapore	36,500	6.4%	39,500	8.2%	Positive
Japan	37,300	4.5%	40,400	8.3%	Positive
Malaysia	32,200	-1.8%	34,900	8.4%	Positive
South Korea	25,700	2.4%	22,400	-12.8%	Negative
India	27,000	15.4%	31,500	16.7%	Positive
Hong Kong	24,800	18.7%	26,600	7.3%	Positive
<b>National Total</b>	<b>758,200</b>	<b>7.8%</b>	<b>778,200</b>	<b>2.6%</b>	<b>Positive</b>



Source: November 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%.



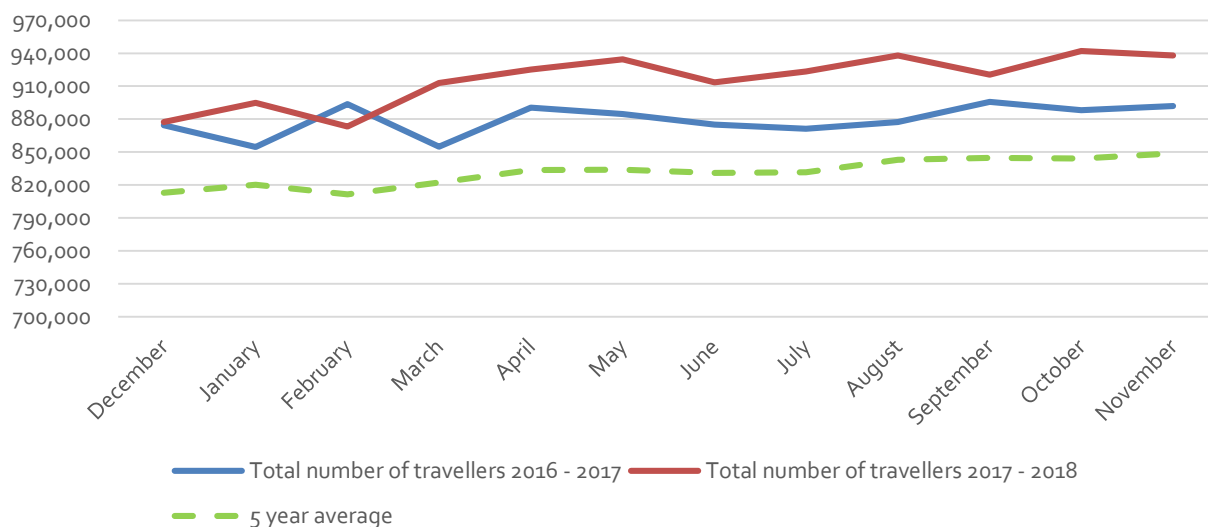
## Total outbound Australian travellers – November 2018

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

### Key Highlights

- During November 2018, short-term resident returns (938,000 movements) decreased 0.4% when compared with October 2018 (942,200 movements).
- This followed a monthly decrease of 1.9% for September 2018 and a monthly increase of 2.4% for October 2018.

Month	Total number of travellers 2016 – 2017	Change on previous year	Total number of travellers 2017 - 2018	Change on previous year	2018 Performance
December	874,300	7.7%	877,300	0.3%	Neutral
January	854,600	5.5%	894,900	4.7%	Positive
February	893,800	12.3%	873,300	-2.3%	Negative
March	855,000	5.9%	912,800	6.8%	Positive
April	890,500	9.6%	925,200	3.9%	Positive
May	884,500	9.0%	934,400	5.6%	Positive
June	875,000	6.1%	913,500	4.4%	Positive
July	871,200	4.5%	923,300	6.0%	Positive
August	877,200	5.0%	937,900	6.9%	Positive
September	895,800	5.8%	920,400	2.7%	Positive
October	888,100	5.8%	942,200	6.1%	Positive
November	892,000	6.2%	938,000	5.2%	Positive
Total	10,552,000	6.9%	10,993,200	4.2%	Positive



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

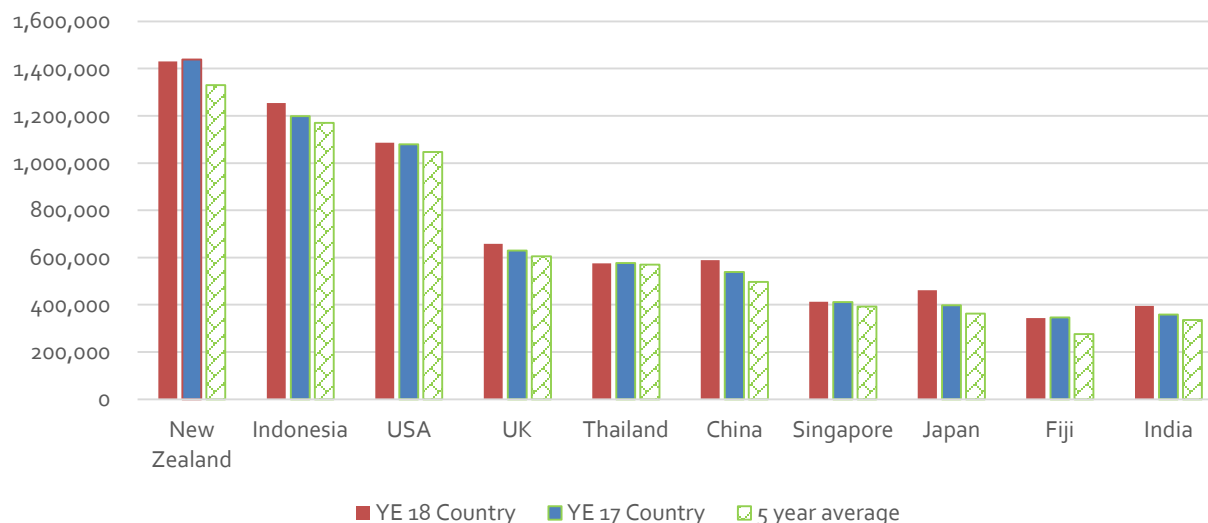
## Year end changes to popular international destinations travelled to by Australian's – November 2018

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

### Key Highlights

- Singapore drops from a Positive 4.4% growth recorded in October to a Neutral position of 0.4% with November volume dropping to 31,200 from 34,100 in October.

Destination	Total number of travellers 2017	2017 Year end change	Total number of travellers 2018	2018 Year end change	2018 Performance
New Zealand	1,437,800	8.2%	1,430,400	-0.5%	Neutral
Indonesia	1,199,200	-2.3%	1,254,400	4.6%	Positive
USA	1,079,900	1.0%	1,086,700	0.6%	Neutral
UK	629,000	9.3%	658,500	4.7%	Positive
Thailand	576,400	5.5%	575,700	-0.1%	Neutral
China	538,800	17.1%	589,400	9.4%	Positive
Singapore	410,800	9.1%	412,400	0.4%	Neutral
Japan	398,300	13.0%	461,800	15.9%	Positive
Fiji	346,000	-0.5%	343,600	-0.7%	Neutral
India	359,300	12.0%	395,700	10.1%	Positive
<b>National Total</b>	<b>10,552,000</b>	<b>6.9%</b>	<b>10,993,200</b>	<b>4.2%</b>	<b>Positive</b>



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

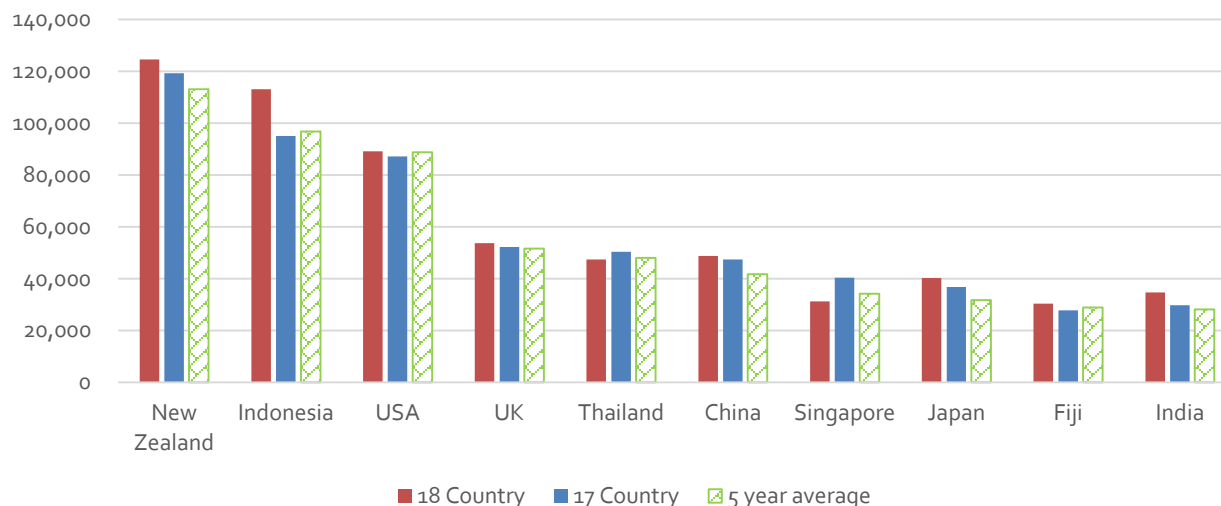
## Monthly changes to popular international destinations travelled to by Australian's – November 2018

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

### Key Highlights

- Singapore records its largest drop of 22.8% and volume of 31,200 is below the 5 year average of 34,220.
- Singapore volume in November 2018 was the same as in November 2014.
- Thailand drops from a Neutral position recorded in October to a Negative position.

Destination	Total number of travellers 2017	Change to previous year	Total number of travellers 2018	Change to previous year	2018 Performance
New Zealand	119,300	8.1%	124,600	4.4%	Positive
Indonesia	95,100	-7.5%	113,100	18.9%	Positive
USA	87,100	-7.5%	89,100	2.3%	Positive
UK	52,200	1.2%	53,700	2.9%	Positive
Thailand	50,400	13.3%	47,400	-6.0%	Negative
China	47,400	14.8%	48,700	2.7%	Positive
Singapore	40,400	22.8%	31,200	-22.8%	Negative
Japan	36,800	21.5%	40,200	9.2%	Positive
Fiji	27,700	-5.5%	30,300	9.4%	Positive
India	29,700	0.7%	34,700	16.8%	Positive
<b>National Total</b>	<b>892,000</b>	<b>6.2%</b>	<b>938,000</b>	<b>5.2%</b>	<b>Positive</b>

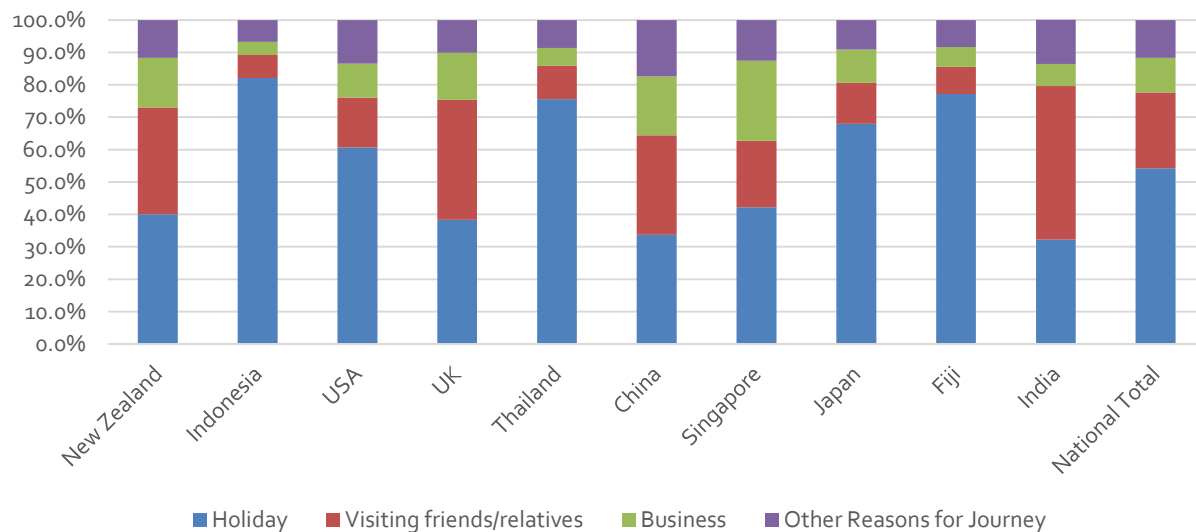


Source: November 2018 Short-term Movement, Residents Returning - Selected Destinations: Seasonally adjusted

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

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

	Holiday	Visiting friends/relatives	Business	Other Reasons for Journey
New Zealand	40.0%	33.0%	15.3%	11.7%
Indonesia	82.1%	7.0%	4.1%	6.7%
USA	60.6%	15.5%	10.5%	13.4%
UK	38.3%	37.1%	14.5%	10.1%
Thailand	75.6%	10.2%	5.6%	8.6%
China	33.7%	30.7%	18.2%	17.4%
Singapore	42.2%	20.5%	24.7%	12.5%
Japan	68.0%	12.6%	10.3%	9.2%
Fiji	77.1%	8.4%	6.1%	8.4%
India	32.2%	47.4%	6.9%	13.6%
National Total	54.3%	23.4%	10.7%	11.6%



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



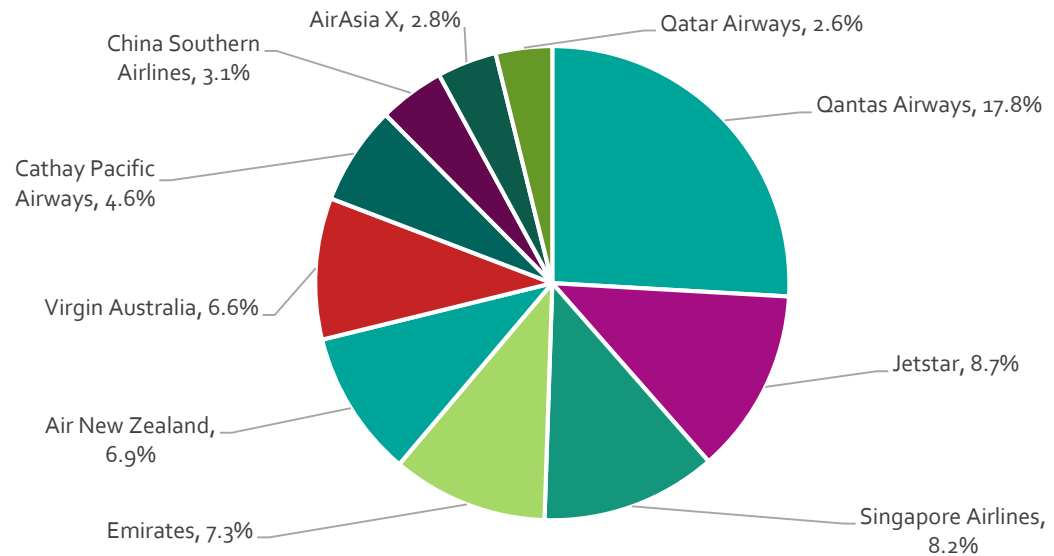
Source: International Airline Activity—Monthly Publications, October 2018

## Airline activity - Month End October 2018

This snapshot displays the market share of each airline for international travel for the month of October 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	October -17	October -18
<b>Qantas Airways</b>	16.8%	17.8%
<b>Jetstar</b>	9.0%	8.7%
<b>Singapore Airlines</b>	8.4%	8.2%
<b>Emirates</b>	7.9%	7.3%
<b>Air New Zealand</b>	6.9%	6.9%
<b>Virgin Australia</b>	6.2%	6.6%
<b>Cathay Pacific Airways</b>	4.6%	4.6%
<b>China Southern Airlines</b>	3.0%	3.1%
<b>AirAsia X</b>	3.8%	2.8%
<b>Qatar Airways</b>	2.2%	2.6%



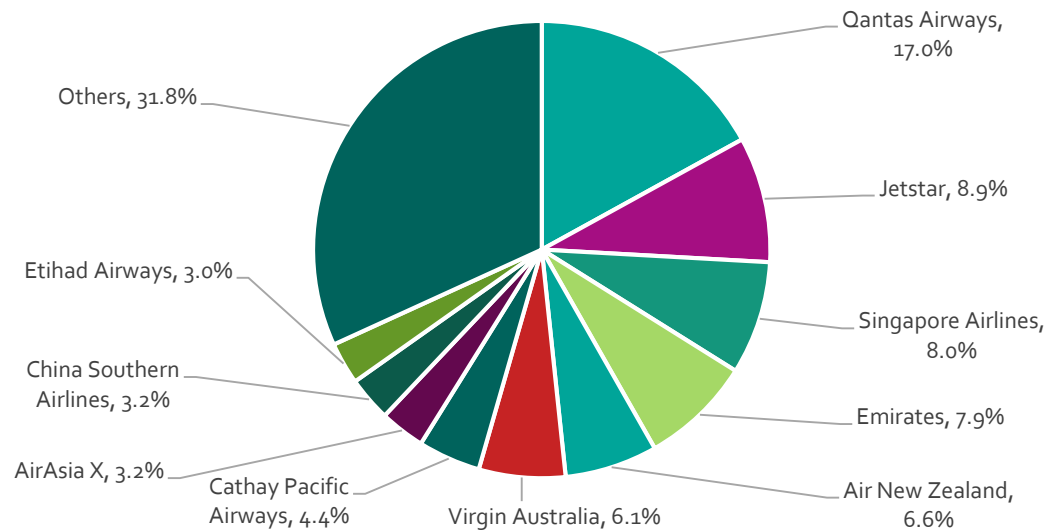
Source: International Airline Activity—Monthly Publications, October 2017 and October 2018

## Airline activity – Year End October 2018

This snapshot displays the market share of each airline for international travel of Year end – October 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	October - 17	Year End share of passengers carried	October - 18
<b>Qantas Airways</b>	16.2%	<b>Qantas Airways</b>	17.0%
<b>Jetstar</b>	9.2%	<b>Jetstar</b>	8.9%
<b>Emirates</b>	8.4%	<b>Singapore Airlines</b>	8.0%
<b>Singapore Airlines</b>	8.1%	<b>Emirates</b>	7.9%
<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>	4.6%	<b>Cathay Pacific Airways</b>	4.4%
<b>AirAsia X</b>	4.1%	<b>AirAsia X</b>	3.2%
<b>Etihad Airways</b>	3.2%	<b>China Southern Airlines</b>	3.2%
<b>China Southern Airlines</b>	3.0%	<b>Etihad Airways</b>	3.0%
<b>Others</b>	30.6%	<b>Others</b>	31.8%



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

For further information please contact:

Naomi Menon

Head of Compliance and Operations

E: [naomi@afta.com.au](mailto:naomi@afta.com.au)

Ph: 02 9287 9900

*The information contained within this Report has been prepared by AFTA based upon best endeavours to ensure the accuracy and completeness of material.*

*AFTA accepts no liability for any loss or damage a person suffers because that person has directly or indirectly relied on any information provided by AFTA.*

