

# AFTA Travel Trends

April 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 February 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 February 2019

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 February Year end 2018 and 2019.

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.

	February YE 2018 Total number of international visitors to Australia <i>Inbound</i>	February YE 2019 Total number of international visitors to Australia <i>Inbound</i>	February YE 2018 Total number of international trips by Australians <i>Outbound</i>	February YE 2019 Total number of international trips by Australians <i>Outbound</i>
China	1,397,400	1,451,600	539,400	613,100
New Zealand	1,359,700	1,400,200	1,436,000	1,437,500
USA	802,300	785,400	1,069,700	1,089,000
UK	729,100	728,900	631,300	667,900
Singapore	439,100	452,500	398,400	417,200
Japan	437,500	471,700	411,000	473,000
Malaysia	400,000	397,600	267,500	267,700
South Korea	312,100	289,100	73,400	75,100
India	312,100	364,300	370,000	403,600
Hong Kong	287,800	310,900	225,500	248,900
Indonesia	312,100	364,300	1,178,700	1,292,700
Thailand	97,400	99,500	586,500	567,300
Fiji	42,800	45,400	341,000	341,500
<b>National Total</b>	<b>8,931,900</b>	<b>9,292,000</b>	<b>10,578,300</b>	<b>11,143,100</b>

Source: February 2019 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%.



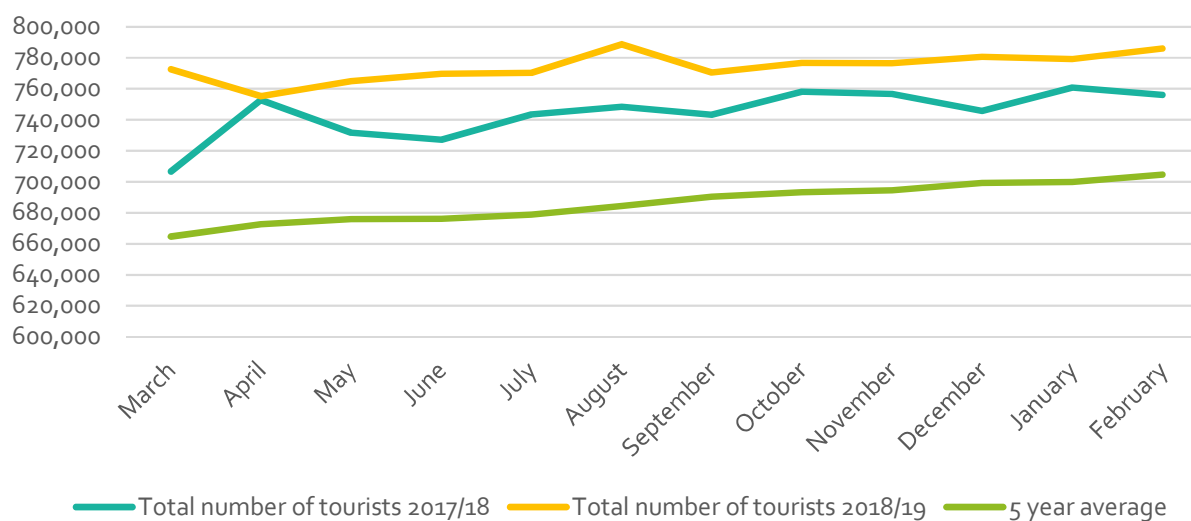
## Total inbound tourists to Australia – February 2019

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

### Key Highlights

- During February 2019, short-term visitor arrivals (786,100 movements) increased by 0.9% when compared with January 2019 (779,300 movements).
- This followed a monthly increase of 0.5% for December 2018 and a decrease of 0.2% for January 2019.

Month	Total number of travellers 2017/18	Change on previous year	Total number of travellers 2018/19	Change on previous year	2018/19 Performance
March	706,700	5.2%	772,600	9.3%	Positive
April	752,800	11.0%	755,300	0.3%	Neutral
May	731,800	7.7%	765,100	4.6%	Positive
June	727,300	4.8%	769,800	5.8%	Positive
July	743,500	7.2%	770,500	3.6%	Positive
August	748,500	9.3%	788,800	5.4%	Positive
September	743,300	3.8%	770,600	3.7%	Positive
October	758,200	7.0%	776,700	2.4%	Positive
November	756,800	7.6%	776,500	2.6%	Positive
December	745,900	4.7%	780,700	4.7%	Positive
January	760,900	6.9%	779,300	2.4%	Positive
February	756,200	4.2%	786,100	4.0%	Positive
National Total	8,931,900	6.6%	9,292,000	4.0%	Positive



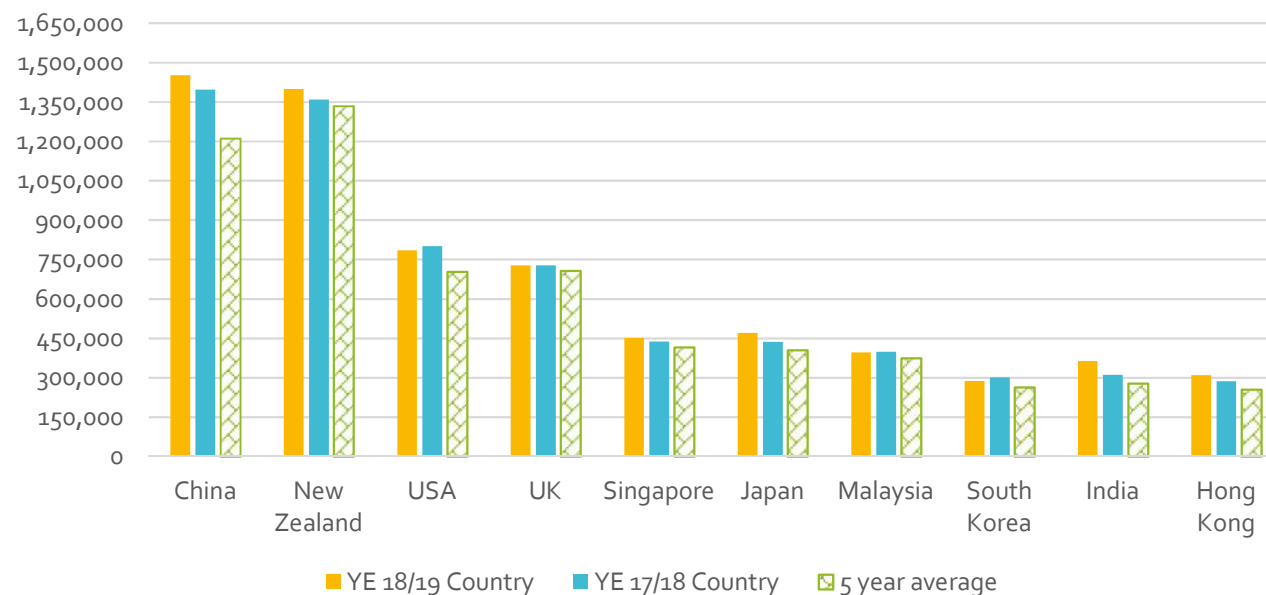
## Year end changes to top Australian source markets – February 2019

This section displays the performance of the major Australian source markets for international travellers for 12 month period ending February 2018 and 2019.

### Key Highlights

- **India experienced an 0.8% increase in growth rate between January 2019 and February 2019.**
- **China remained the highest source market by volume with 1,451,600 visitors in 2018/19.**

Destination	Total number of travellers 2017/18	2017/18 Year end change	Total number of travellers 2018/19	2018/19 Year end change	2018/19 Performance
China	1,397,400	12.6%	1,451,600	3.9%	Positive
New Zealand	1,359,700	1.0%	1,400,200	3.0%	Positive
USA	802,300	9.9%	785,400	-2.1%	Negative
UK	729,100	1.2%	728,900	0.0%	Neutral
Singapore	439,100	1.3%	452,500	3.1%	Positive
Japan	437,500	3.7%	471,700	7.8%	Positive
Malaysia	400,000	1.7%	397,600	-0.6%	Neutral
South Korea	302,300	5.8%	289,100	-4.4%	Negative
India	312,100	15.5%	364,300	16.7%	Positive
Hong Kong	287,800	15.1%	310,900	8.0%	Positive
<b>National Total</b>	<b>8,931,900</b>	<b>6.6%</b>	<b>9,292,000</b>	<b>4.0%</b>	<b>Positive</b>



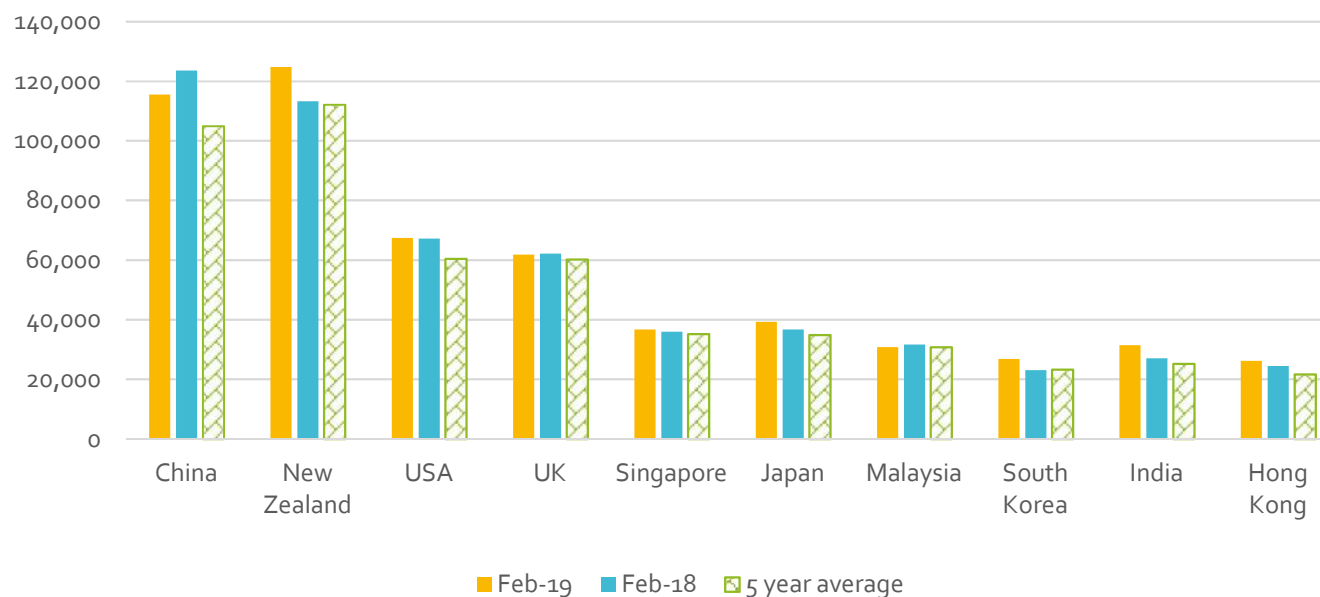
## Monthly changes to top Australian source markets – February 2019

This section displays the performance of the major Australian source markets for international tourists comparing the Month of February 2018 to February 2019.

### Key Highlights

- **South Korea moved from a negative position to a positive position with a 16.5% change on previous year.**
- **New Zealand continued to remain the top Australian source market in terms of numbers, with 124,800 travellers in February 2019.**

Destination	Total number of travellers 2018	Change on previous year	Total number of travellers 2019	Change on previous year	2019 Performance
China	123,600	15.2%	115,600	-6.5%	Negative
New Zealand	113,300	1.5%	124,800	10.2%	Positive
USA	67,200	9.4%	67,500	0.4%	Neutral
UK	62,200	-3.3%	61,900	-0.5%	Neutral
Singapore	36,000	-6.3%	36,800	2.2%	Positive
Japan	36,800	2.5%	39,300	6.8%	Positive
Malaysia	31,700	-6.2%	30,900	-2.5%	Negative
South Korea	23,100	-3.8%	26,900	16.5%	Positive
India	27,100	6.7%	31,500	16.2%	Positive
Hong Kong	24,500	9.9%	26,200	6.9%	Positive
<b>National Total</b>	<b>756,200</b>	<b>4.2%</b>	<b>786,100</b>	<b>4.0%</b>	<b>Positive</b>



Source: February 2019 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 – February 2019

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

### Key Highlights

- During February 2019, short-term resident returns (912,500 movements) decreased by 3.3% when compared with January 2019.
- There was a monthly increase of 0.7% for December 2018 and a 0.1% increase for January 2019.
- An overall growth of 5.3% occurred from 2018 to 2019 in outbound travellers.

Month	Total number of travellers 2017/18	Change on previous year	Total number of travellers 2018/19	Change on previous year	2018/19 Performance
March	855,500	5.9%	913,500	6.8%	Positive
April	890,600	9.5%	924,000	3.8%	Positive
May	884,400	9.0%	934,800	5.7%	Positive
June	875,700	6.2%	914,700	4.5%	Positive
July	870,500	4.4%	922,500	6.0%	Positive
August	877,300	5.0%	937,900	6.9%	Positive
September	895,600	5.9%	919,700	2.7%	Positive
October	887,700	5.8%	941,700	6.1%	Positive
November	890,300	6.1%	935,600	5.1%	Positive
December	875,900	0.4%	942,400	7.6%	Positive
January	895,100	4.7%	943,800	5.4%	Positive
February	879,700	-2.1%	912,500	3.7%	Positive
<b>Total</b>	<b>10,578,300</b>	<b>5.0%</b>	<b>11,143,100</b>	<b>5.3%</b>	<b>Positive</b>



Source: February 2019 Short-term Movement, Residents Returning - Selected Destinations: Seasonally adjusted

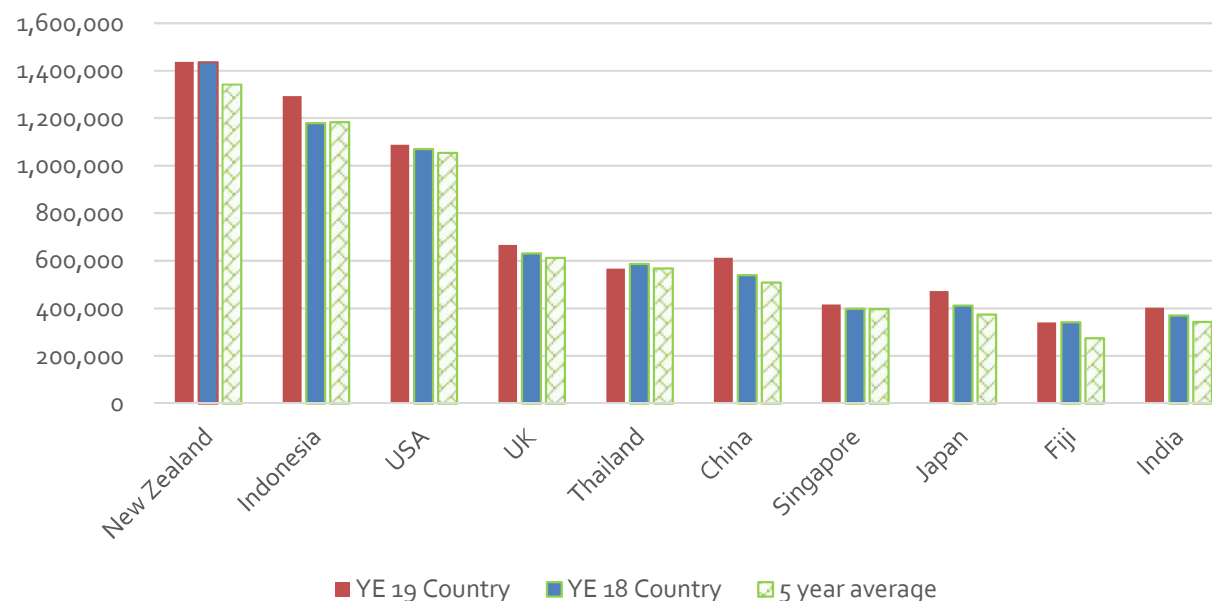
## Year end changes to popular international destinations travelled to by Australian's – February 2019

This section displays the performance of the major destinations Australian's are travelling to as of February Year end 2018 and 2019.

### Key Highlights

- **Japan experienced a decrease in growth rate of 0.3% between January 2019 and February 2019.**
- **Thailand continues to remain below the 5 year average and again experienced a negative growth rate.**

Destination	Total number of travellers 2018	2018 Year end change	Total number of travellers 2019	2019 Year end change	2019 Performance
New Zealand	1,436,000	5.7%	1,437,500	0.1%	Neutral
Indonesia	1,178,700	-4.3%	1,292,700	9.7%	Positive
USA	1,069,700	-1.0%	1,089,000	1.8%	Neutral
UK	631,300	6.0%	667,900	5.8%	Positive
Thailand	586,500	6.8%	567,300	-3.3%	Negative
China	539,400	11.3%	613,100	13.7%	Positive
Singapore	398,400	0.9%	417,200	4.7%	Positive
Japan	411,000	13.2%	473,000	15.1%	Positive
Fiji	341,000	-2.5%	341,500	0.1%	Neutral
India	370,000	11.1%	403,600	9.1%	Positive
<b>National Total</b>	<b>10,578,300</b>	<b>5.0%</b>	<b>11,143,100</b>	<b>5.3%</b>	<b>Positive</b>



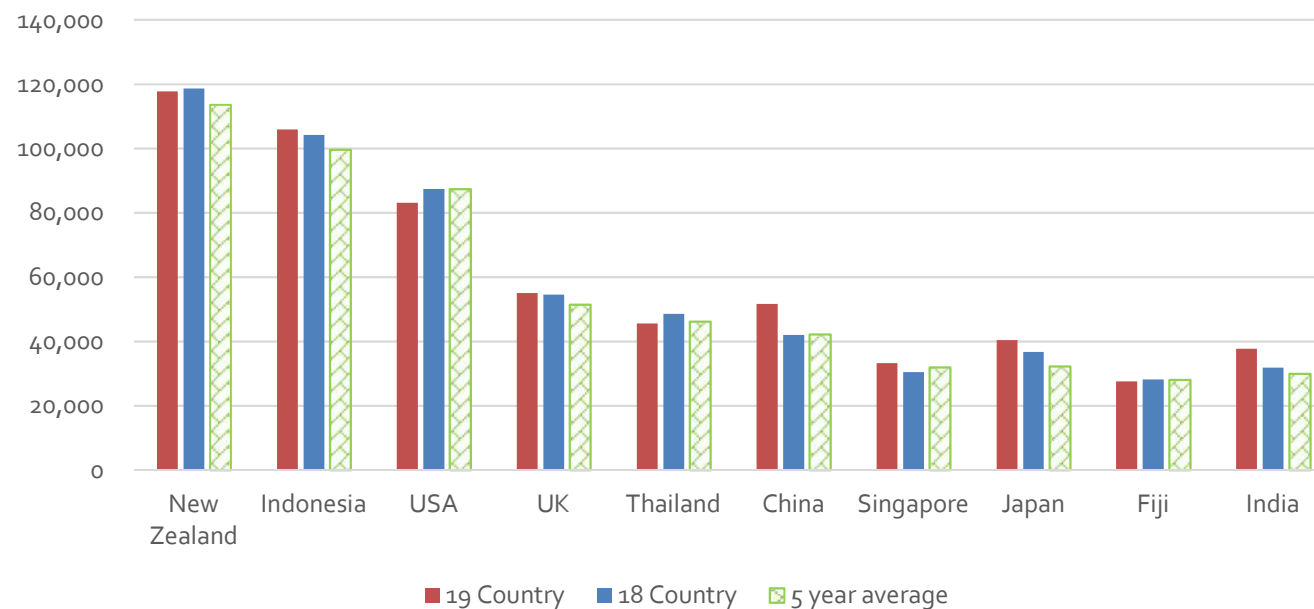
## Monthly changes to popular international destinations travelled to by Australian's – February 2019

This section displays the performance of the major destinations Australian's are travelling to, comparing February 2018 to February 2019

### Key Highlights

- **India has continued to see strong growth in visitation by Australians, with 58.9% travelling to visit family or friends.**
- **China experienced significant growth of 22.8% to 51,700 travellers in February 2019.**
- **As a popular destination for Australian travelers, Thailand is below the 5 year average.**

Destination	Total number of travellers 2018	Change to previous year	Total number of travellers 2019	Change to previous year	2019 Performance
New Zealand	118,700	-0.1%	117,800	-0.8%	Neutral
Indonesia	104,300	1.0%	106,000	1.6%	Neutral
USA	87,400	-4.1%	83,200	-4.8%	Negative
UK	54,600	2.1%	55,100	0.9%	Neutral
Thailand	48,600	4.1%	45,600	-6.2%	Negative
China	42,100	-16.1%	51,700	22.8%	Positive
Singapore	30,500	-14.1%	33,300	9.2%	Positive
Japan	36,800	12.9%	40,500	10.1%	Positive
Fiji	28,200	-2.4%	27,600	-2.1%	Negative
India	31,900	0.0%	37,800	18.5%	Positive
<b>National Total</b>	<b>879,700</b>	<b>-2.1%</b>	<b>912,500</b>	<b>3.7%</b>	<b>Positive</b>



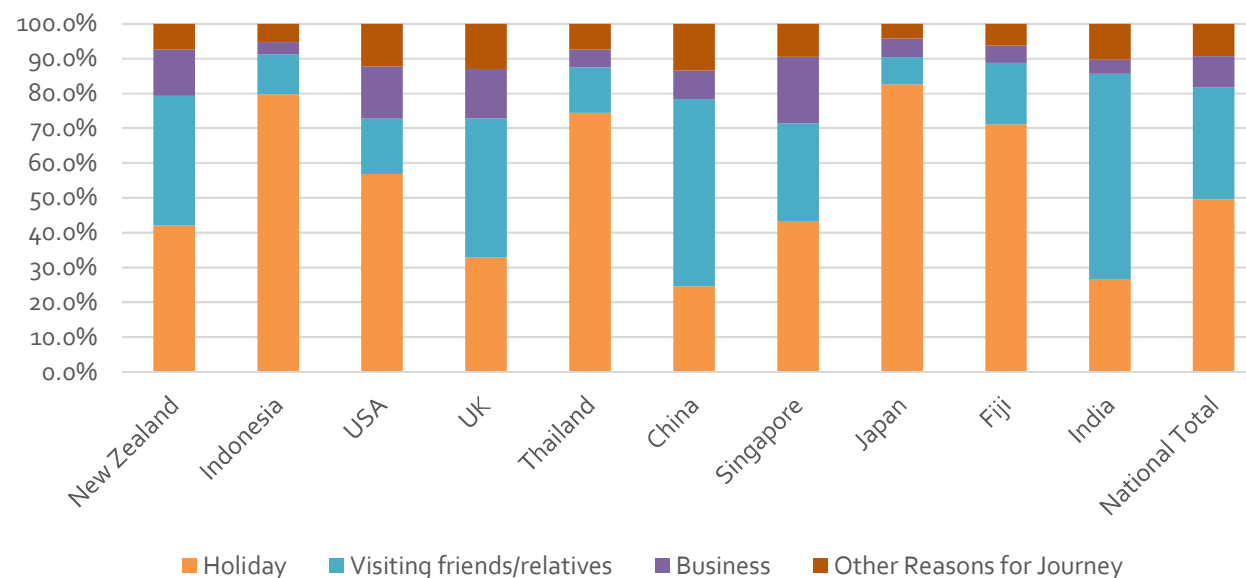
Source: February 2019 Short-term Movement, Residents Returning - Selected Destinations: Seasonally adjusted



## Reasons to travel to popular international destinations by Australian's – February 2019

This section displays the performance of the popular destinations visited by Australian's by reason of travel in February 2019.

	Holiday	Visiting friends/relatives	Business	Other Reasons for Journey
New Zealand	42.1%	37.2%	13.3%	7.3%
Indonesia	79.8%	11.5%	3.5%	5.2%
USA	56.9%	15.9%	15.0%	12.2%
UK	32.9%	40.0%	14.2%	13.0%
Thailand	74.5%	13.0%	5.2%	7.3%
China	24.6%	53.7%	8.2%	13.4%
Singapore	43.4%	28.0%	19.2%	9.4%
Japan	82.7%	7.8%	5.3%	4.2%
Fiji	71.1%	17.7%	4.9%	6.3%
India	26.8%	58.9%	4.0%	10.3%
National Total	49.7%	32.1%	9.0%	9.3%



# 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:

Sixty-one international airlines operated scheduled services to/from Australia during January 2019 (includes five dedicated freight airlines but excludes airlines operating only via code share arrangements).



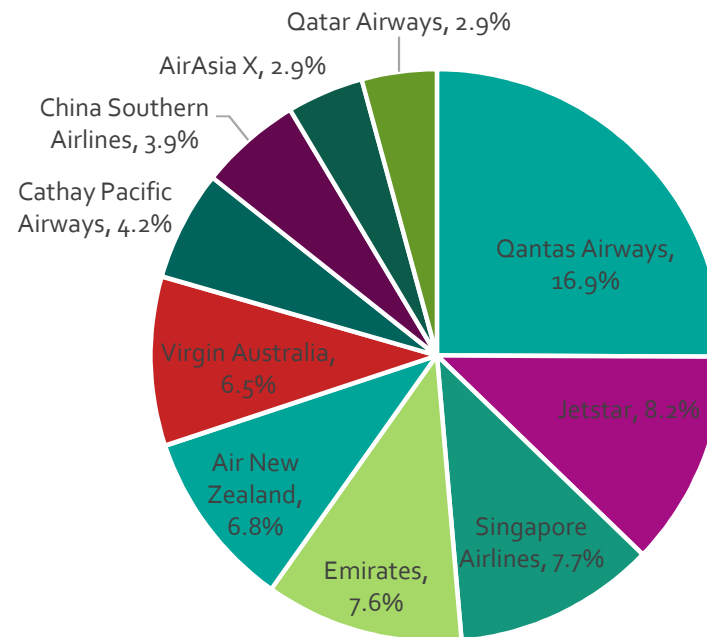
Source: International Airline Activity—Monthly Publications, January 2019

## Airline activity - Month End January 2019

This snapshot displays the market share of each airline for international travel for the month of January 2019.

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	January -18	January -19
<b>Qantas Airways</b>	16.5%	16.9%
<b>Jetstar</b>	8.9%	8.2%
<b>Singapore Airlines</b>	7.6%	7.7%
<b>Emirates</b>	8.3%	7.6%
<b>Air New Zealand</b>	6.3%	6.8%
<b>Virgin Australia</b>	6.0%	6.5%
<b>Cathay Pacific Airways</b>	4.3%	4.2%
<b>China Southern Airlines</b>	3.5%	3.9%
<b>AirAsia X</b>	3.5%	2.9%
<b>Qatar Airways</b>	2.4%	2.9%



Source: International Airline Activity—Monthly Publications, January 2018 and January 2019

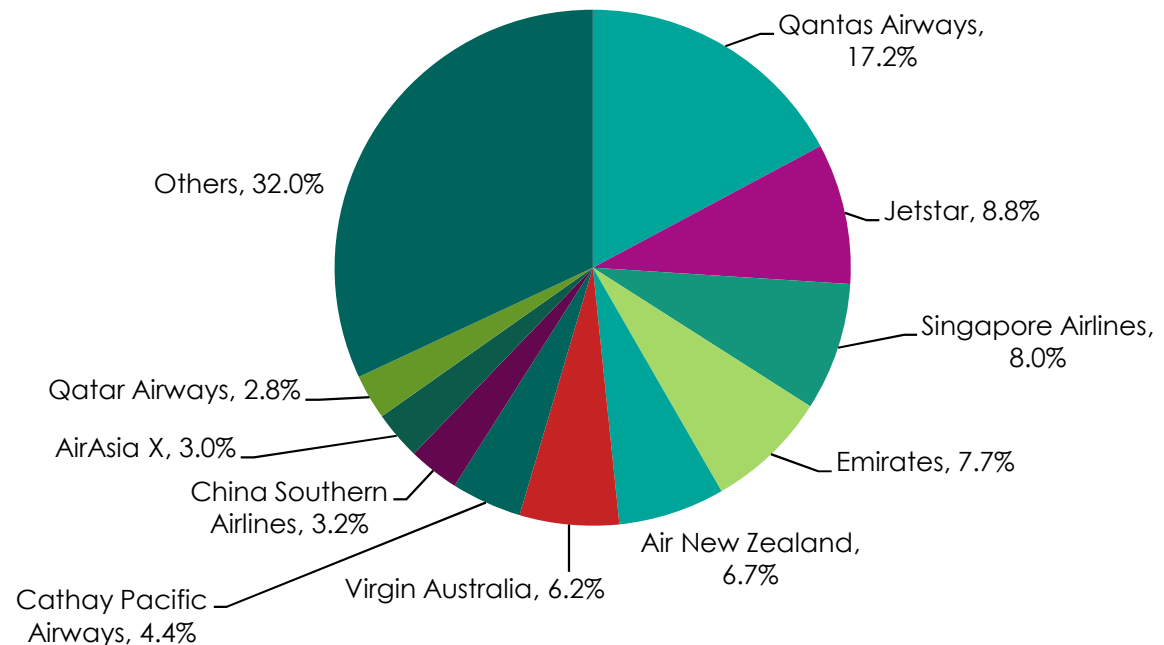


## Airline activity – Year End January 2019

This snapshot displays the market share of each airline for international travel of Year end – January 2019.

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	January - 18	Year End share of passengers carried	January - 19
<b>Qantas Airways</b>	16.4%	<b>Qantas Airways</b>	17.2%
<b>Jetstar</b>	9.1%	<b>Jetstar</b>	8.8%
<b>Singapore Airlines</b>	8.1%	<b>Singapore Airlines</b>	8.0%
<b>Emirates</b>	8.3%	<b>Emirates</b>	7.7%
<b>Air New Zealand</b>	6.6%	<b>Air New Zealand</b>	6.7%
<b>Virgin Australia</b>	6.0%	<b>Virgin Australia</b>	6.2%
<b>Cathay Pacific Airways</b>	4.6%	<b>Cathay Pacific Airways</b>	4.4%
<b>China Southern Airlines</b>	3.1%	<b>China Southern Airlines</b>	3.2%
<b>AirAsia X</b>	3.9%	<b>AirAsia X</b>	3.0%
<b>Etihad Airways</b>	3.2%	<b>Qatar Airways</b>	2.8%
<b>Others</b>	30.7%	<b>Others</b>	32.0%



Source: International Airline Activity—Monthly Publications, January 2018 and January 2019

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