

AFTA Travel Trends

June 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 April 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 April 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 April 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.

	April YE 2018 Total number of international visitors to Australia <i>Inbound</i>	April YE 2019 Total number of international visitors to Australia <i>Inbound</i>	April YE 2018 Total number of international trips by Australians <i>Outbound</i>	April YE 2019 Total number of international trips by Australians <i>Outbound</i>
China	1,419,700	1,438,500	556,100	607,600
New Zealand	1,364,300	1,403,300	1,425,400	1,440,300
USA	796,200	795,600	1,073,500	1,080,100
UK	732,700	723,000	637,200	663,500
Singapore	437,900	452,300	402,800	412,500
Japan	440,000	481,600	424,700	471,000
Malaysia	396,600	389,700	268,500	262,300
South Korea	324,600	283,800	73,300	76,500
India	324,600	365,600	378,600	404,100
Hong Kong	292,400	309,400	227,600	250,000
Indonesia	324,600	365,600	1,193,400	1,294,400
Thailand	98,300	98,800	587,600	562,800
Fiji	44,100	45,400	340,100	342,500
National Total	9,004,300	9,286,300	10,668,800	11,138,300

Source: April 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%.



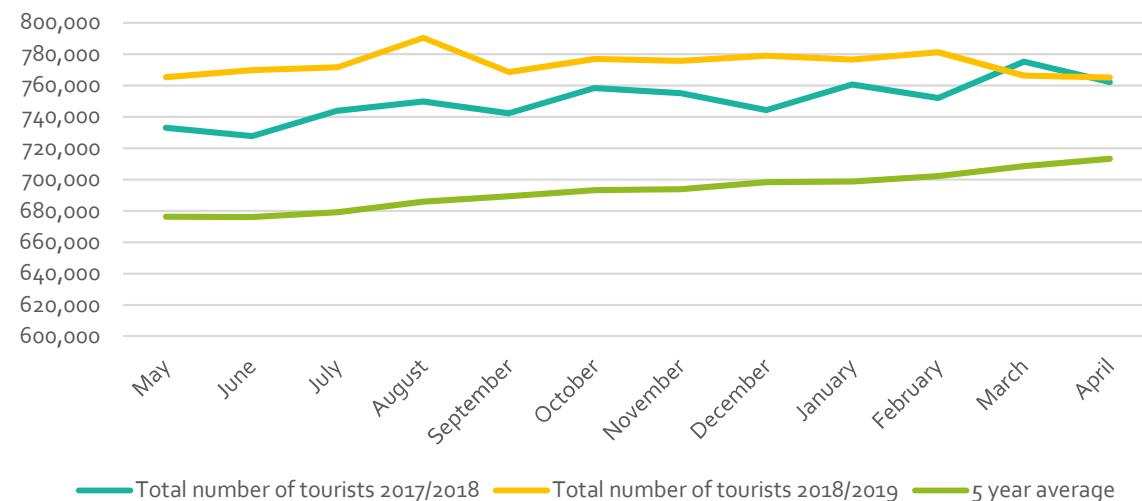
Total inbound tourists to Australia – April 2019

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

Key Highlights

- During April 2019, short-term visitor arrivals (765,100 movements) decreased by 0.2% when compared with March 2019 (766,400 movements).
- This followed a monthly increase of 0.6% for February 2019 and a decrease of 1.9% for March 2019.
- Over the past 12 months, April 2019 experienced the lowest number of inbound 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
May	733,000	7.8%	765,200	4.4%	Positive
June	727,700	4.9%	769,800	5.8%	Positive
July	743,900	7.3%	771,600	3.7%	Positive
August	749,700	9.2%	790,400	5.4%	Positive
September	742,300	3.7%	768,600	3.5%	Positive
October	758,300	7.1%	776,900	2.5%	Positive
November	755,100	7.6%	775,700	2.7%	Positive
December	744,200	4.6%	778,900	4.7%	Positive
January	760,600	7.2%	776,500	2.1%	Positive
February	752,100	3.8%	781,200	3.9%	Positive
March	775,200	9.4%	766,400	-1.1%	Neutral
April	762,200	0.9%	765,100	0.4%	Neutral
National Total	9,004,300	6.1%	9,286,300	3.1%	Positive



Source: April 2019 Short-term Movement, Visitor Arrivals - Selected Countries of Residence: Seasonally adjusted

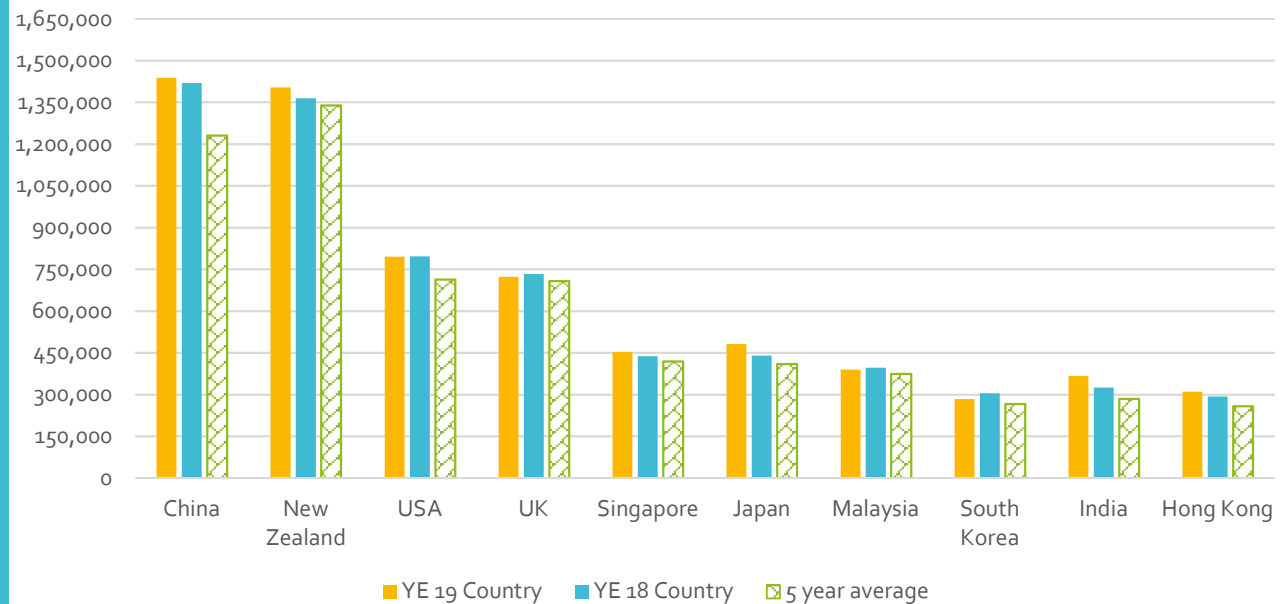
Year end changes to top Australian source markets – April 2019

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

Key Highlight

- All markets displayed a neutral or positive performance, except South Korea which saw a 6.5% drop in the 12 month period.
- India is the highest growth market by % growth (12.6%, 41,000 movements), but Japan is the highest growth market by volume (9.5%, 41,600 movements).

Destination	Total number of travellers 2018	2018 Year end change	Total number of travellers 2019	2019 Year end change	2019 Performance
China	1,419,700	13.1%	1,438,500	1.3%	Neutral
New Zealand	1,364,300	0.9%	1,403,300	2.9%	Positive
USA	796,200	6.0%	795,600	-0.1%	Neutral
UK	732,700	1.0%	723,000	-1.3%	Neutral
Singapore	437,900	0.7%	452,300	3.3%	Positive
Japan	440,000	3.7%	481,600	9.5%	Positive
Malaysia	396,600	-1.0%	389,700	-1.7%	Neutral
South Korea	303,500	5.6%	283,800	-6.5%	Negative
India	324,600	18.5%	365,600	12.6%	Positive
Hong Kong	292,400	13.4%	309,400	5.8%	Positive
National Total	9,004,300	6.1%	9,286,300	3.1%	Positive



Source: April 2019 Short-term Movement, Visitor Arrivals - Selected Countries of Residence: Seasonally adjusted

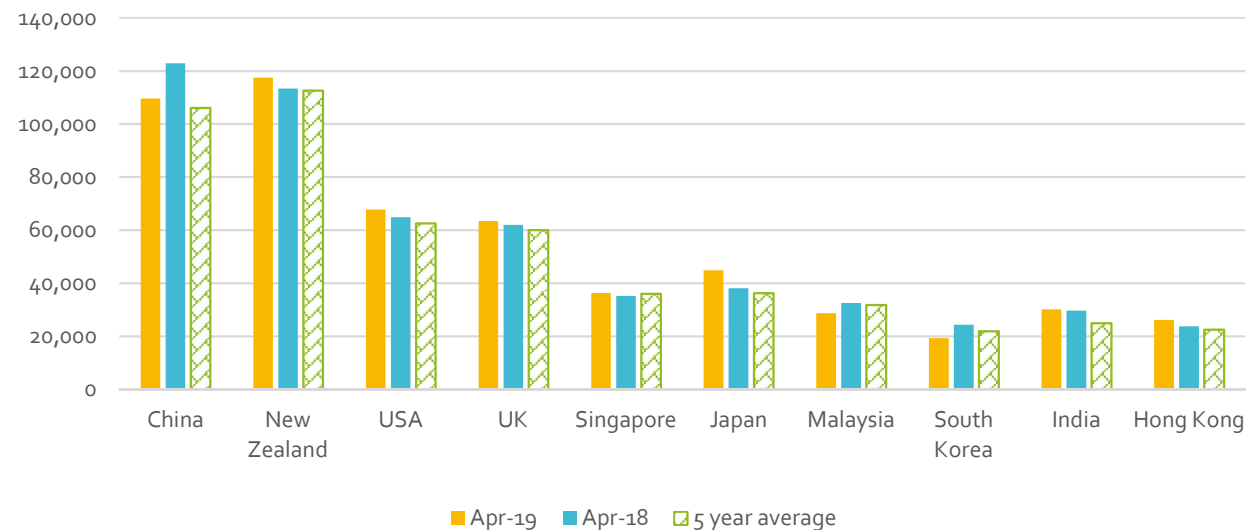
Monthly changes to top Australian source markets – April 2019

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

Key Highlights

- In April 2019, South Korea experienced the lowest number of inbound travellers since September 2015.
- Japan shows strong growth and is tracking 24% above the five year average.

Destination	Total number of travellers 2018	Change on previous year	Total number of travellers 2019	Change on previous year	2019 Performance
China	122,800	10.5%	109,600	-10.7%	Negative
New Zealand	113,300	1.3%	117,400	3.6%	Positive
USA	64,800	-11.5%	67,700	4.5%	Positive
UK	62,000	0.0%	63,400	2.3%	Positive
Singapore	35,200	-12.4%	36,300	3.1%	Positive
Japan	38,100	9.5%	44,900	17.8%	Positive
Malaysia	32,500	-11.4%	28,700	-11.7%	Negative
South Korea	24,400	-4.3%	19,300	-20.9%	Negative
India	29,700	22.2%	30,100	1.3%	Neutral
Hong Kong	23,700	-12.2%	26,200	10.5%	Positive
National Total	762,200	0.9%	765,100	0.4%	Neutral



Source: April 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 – April 2019

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

Key Highlights

- During April 2019, short-term resident returns (914,800 movements) decreased by 1.1% when compared with March 2019 (924,600 movements).
- This followed a monthly decrease of 3.1% for February 2019 and a monthly increase of 1.5% for March 2019.
- Except for February 2018 decrease from previous year, April 2019 was the only other month in 5 years that has lowered in the same period last year.

Month	Total number of travellers 2017/2018	Change on previous year	Total number of travellers 2018/2019	Change on previous year	2019 Performance
May	884,800	8.9%	933,500	5.5%	Positive
June	876,800	6.2%	916,500	4.5%	Positive
July	870,800	4.3%	923,700	6.1%	Positive
August	876,100	4.9%	938,200	7.1%	Positive
September	895,200	5.9%	918,400	2.6%	Positive
October	887,100	5.8%	940,800	6.1%	Positive
November	888,800	6.0%	935,100	5.2%	Positive
December	876,100	0.5%	941,600	7.5%	Positive
January	894,000	4.7%	940,200	5.2%	Positive
February	878,200	-2.1%	910,900	3.7%	Positive
March	913,700	6.7%	924,600	1.2%	Neutral
April	927,200	4.0%	914,800	-1.3%	Neutral
Total	10,668,800	4.6%	11,138,300	4.4%	Positive



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

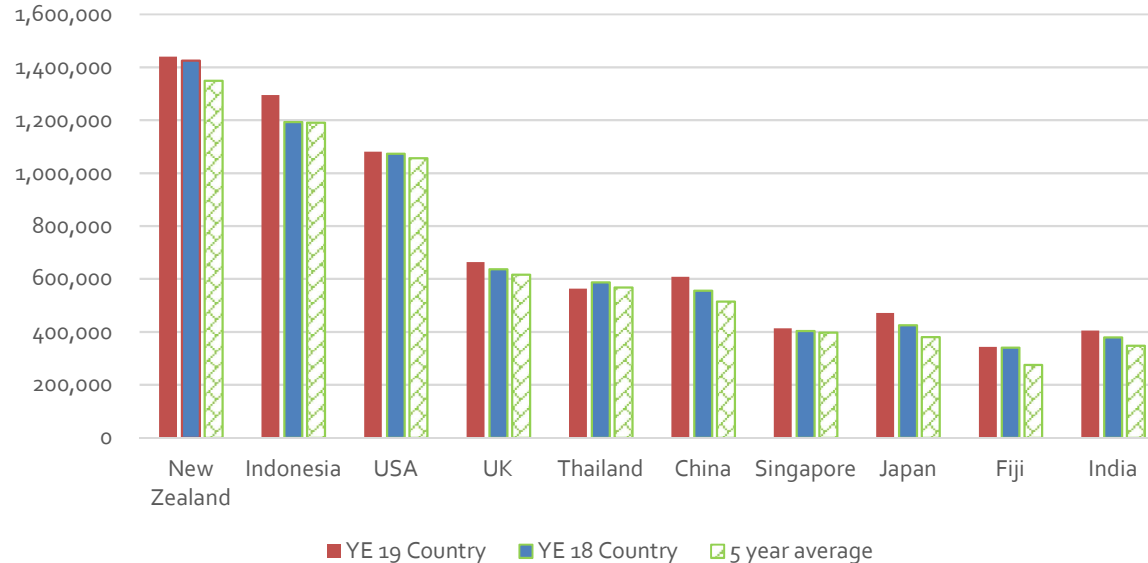
Year end changes to popular international destinations travelled to by Australian's – April 2019

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

Key Highlights

- **Thailand was the only destination to experience negative growth with a decrease of 4.2% over the 12 month period, and is tracking below the five year average.**
- **Australian travellers continue to show a strong appetite for travel to Japan, with a 10.9% increase over the 12 month period.**
- **While Japan is highest in % growth, Indonesia has more than doubled in volume at 101,000 more travellers.**

Destination	Total number of travellers 2018	2018 Year end change	Total number of travellers 2019	2019 Year end change	2019 Performance
New Zealand	1,425,400	2.9%	1,440,300	1.0%	Neutral
Indonesia	1,193,400	-3.3%	1,294,400	8.5%	Positive
USA	1,073,500	-0.8%	1,080,100	0.6%	Neutral
UK	637,200	5.1%	663,500	4.1%	Positive
Thailand	587,600	6.4%	562,800	-4.2%	Negative
China	556,100	13.3%	607,600	9.3%	Positive
Singapore	402,800	0.9%	412,500	2.4%	Positive
Japan	424,700	14.5%	471,000	10.9%	Positive
Fiji	340,100	-2.7%	342,500	0.7%	Neutral
India	378,600	13.0%	404,100	6.7%	Positive
National Total	10,668,800	4.6%	11,138,300	4.4%	Positive



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

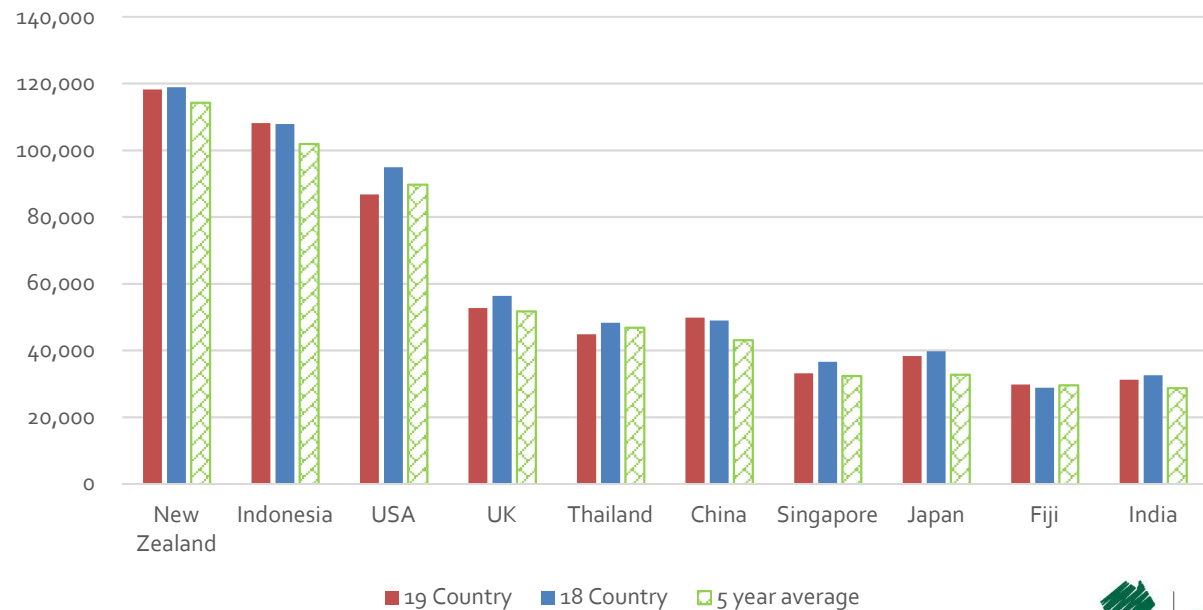
Monthly changes to popular international destinations travelled to by Australian's – April 2019

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

Key Highlights

- **Fiji was the only destination to experience positive growth in visitation, with 79.1% of Australian travellers visiting for a holiday.**
- **A total number of 11,600 less Australians travelled in April 2019, compared with March 2019.**
- **USA and Thailand are both tracking below the five 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	118,900	-5.4%	118,200	-0.6%	Neutral
Indonesia	107,800	7.1%	108,100	0.3%	Neutral
USA	94,900	6.5%	86,700	-8.6%	Negative
UK	56,300	5.0%	52,700	-6.4%	Negative
Thailand	48,300	-0.6%	44,800	-7.2%	Negative
China	48,900	9.9%	49,800	1.8%	Neutral
Singapore	36,600	16.9%	33,100	-9.6%	Negative
Japan	39,700	15.7%	38,300	-3.5%	Negative
Fiji	28,800	-1.4%	29,800	3.5%	Positive
India	32,500	10.5%	31,200	-4.0%	Negative
National Total	927,200	4.0%	914,800	-1.3%	Neutral

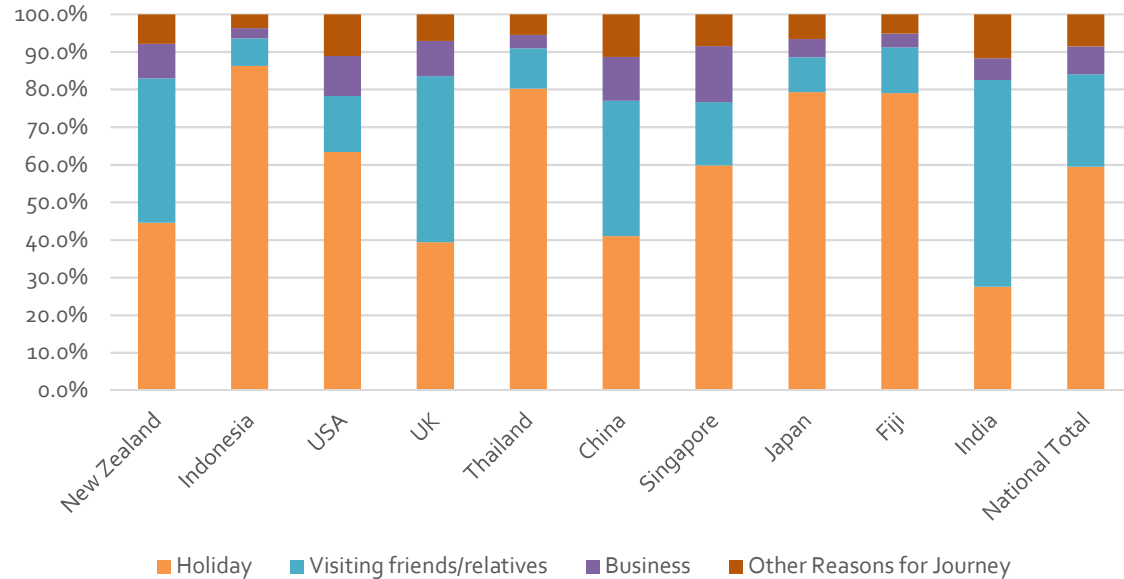


Source: April 2019 Short-term Movement, Residents Returning - Selected Destinations: Seasonally adjusted

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

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

	Holiday	Visiting friends/relatives	Business	Other Reasons for Journey
New Zealand	44.5%	38.4%	9.2%	7.9%
Indonesia	86.2%	7.3%	2.7%	3.7%
USA	63.3%	14.9%	10.7%	11.1%
UK	39.3%	44.2%	9.3%	7.2%
Thailand	80.2%	10.8%	3.6%	5.5%
China	41.0%	36.0%	11.6%	11.4%
Singapore	59.8%	16.8%	14.9%	8.5%
Japan	79.3%	9.3%	4.8%	6.6%
Fiji	79.1%	12.1%	3.6%	5.1%
India	27.6%	55.0%	5.7%	11.7%
National Total	59.5%	24.6%	7.4%	8.6%



Source: April 2019 Short-term Movement, Residents Returning - Selected Destinations: Original

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 March 2019 (includes five dedicated freight airlines but excludes airlines operating only via code share arrangements).

International scheduled passenger traffic in March 2019 was 3.287 million compared to 3.370 million in March 2018 – a decrease of 2.5 per cent



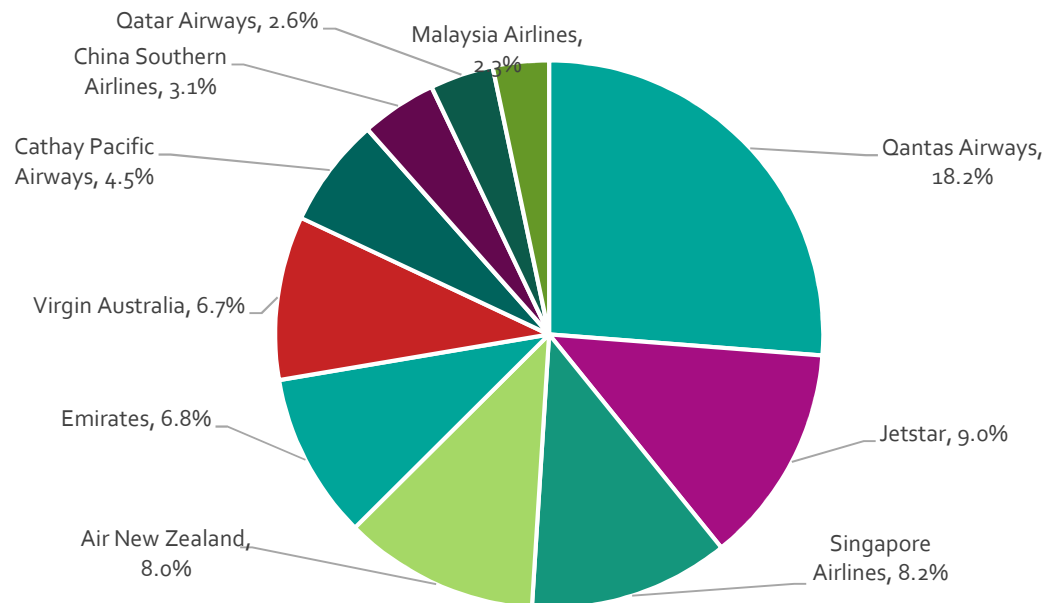
Source: International Airline Activity—Monthly Publications, March 2019

Airline activity - Month End March 2019

This snapshot displays the market share of the top ten airlines for international travel for the month of March 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	March -18	March -19
Qantas Airways	16.9%	18.2%
Jetstar	9.4%	9.0%
Singapore Airlines	7.8%	8.2%
Emirates	7.8%	6.8%
Air New Zealand	7.3%	8.0%
Virgin Australia	6.0%	6.7%
Cathay Pacific Airways	4.6%	4.5%
China Southern Airlines	3.0%	3.1%
Malaysia Airlines	2.0%	2.3%
Qatar Airways	2.6%	2.6%



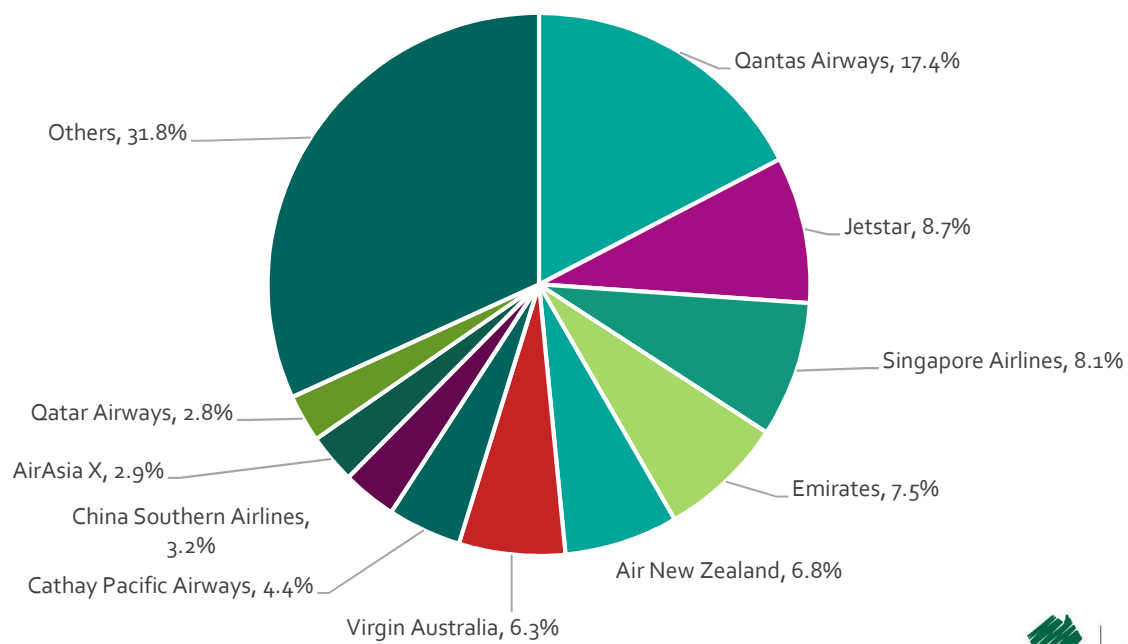
Source: International Airline Activity—Monthly Publications, March 2018 and March 2019

Airline activity – Year End March 2019

This snapshot displays the market share of each airline for international travel of Year end – March 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	March - 18	Year End share of passengers carried	March - 19
Qantas Airways	16.4%	Qantas Airways	17.4%
Jetstar	9.1%	Jetstar	8.7%
Singapore Airlines	8.0%	Singapore Airlines	8.1%
Emirates	8.2%	Emirates	7.5%
Air New Zealand	6.6%	Air New Zealand	6.8%
Virgin Australia	6.1%	Virgin Australia	6.3%
Cathay Pacific Airways	4.6%	Cathay Pacific Airways	4.4%
China Southern Airlines	3.1%	China Southern Airlines	3.2%
AirAsia X	3.7%	AirAsia X	2.9%
Etihad Airways	3.1%	Qatar Airways	2.8%
Others	31.0%	Others	31.8%



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

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