

AFTA Travel Trends

July 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 May 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 May 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 May 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.

	May YE 2018 Total number of international visitors to Australia <i>Inbound</i>	May YE 2019 Total number of international visitors to Australia <i>Inbound</i>	May YE 2018 Total number of international trips by Australians <i>Outbound</i>	May YE 2019 Total number of international trips by Australians <i>Outbound</i>
China	1,430,600	1,445,500	564,600	607,300
New Zealand	1,366,400	1,410,800	1,421,900	1,441,400
USA	792,800	806,900	1,077,700	1,079,900
UK	735,500	721,000	638,800	668,600
Singapore	435,300	456,400	407,700	406,800
Japan	442,800	484,700	431,800	476,200
Malaysia	390,200	392,700	267,900	267,500
South Korea	329,900	282,300	73,200	78,000
India	329,900	367,300	379,900	411,600
Hong Kong	293,700	312,000	232,500	251,700
Indonesia	329,900	367,300	1,205,800	1,300,000
Thailand	99,100	99,000	585,900	565,600
Fiji	44,500	45,700	339,400	342,800
National Total	9,033,400	9,345,400	10,718,000	11,193,200

Source: May 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%.



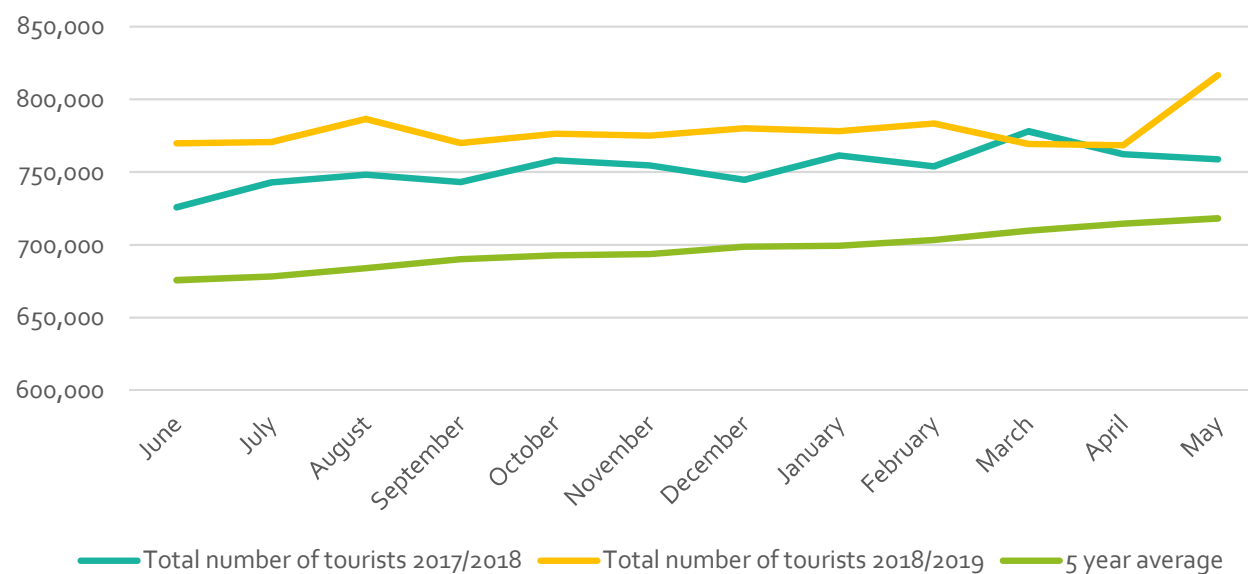
Total inbound tourists to Australia – May 2019

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

Key Highlights

- During May 2019, short-term visitor arrivals (816,600 movements) increased by 6.3% when compared with April 2019 (768,500 movements).
- This followed monthly decreases of 1.8% for March 2019 and 0.1% for April 2019.
- The number of international tourists travelling to Australia in May 2019 was 12% above the five-year average.

Month	Total number of travellers 2017/18	Change on previous year	Total number of travellers 2018/19	Change on previous year	2018/19 Performance
June	725,900	4.8%	769,800	6.0%	Positive
July	743,000	7.2%	770,700	3.7%	Positive
August	748,400	9.2%	786,600	5.1%	Positive
September	743,300	4.0%	770,100	3.6%	Positive
October	758,200	7.1%	776,500	2.4%	Positive
November	754,700	7.3%	775,200	2.7%	Positive
December	744,800	4.7%	780,100	4.7%	Positive
January	761,600	7.2%	778,300	2.2%	Positive
February	754,100	3.8%	783,500	3.9%	Positive
March	778,100	9.8%	769,500	-1.1%	Neutral
April	762,400	0.6%	768,500	0.8%	Neutral
May	758,900	4.1%	816,600	7.6%	Positive
National Total	9,033,400	5.8%	9,345,400	3.5%	Positive



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

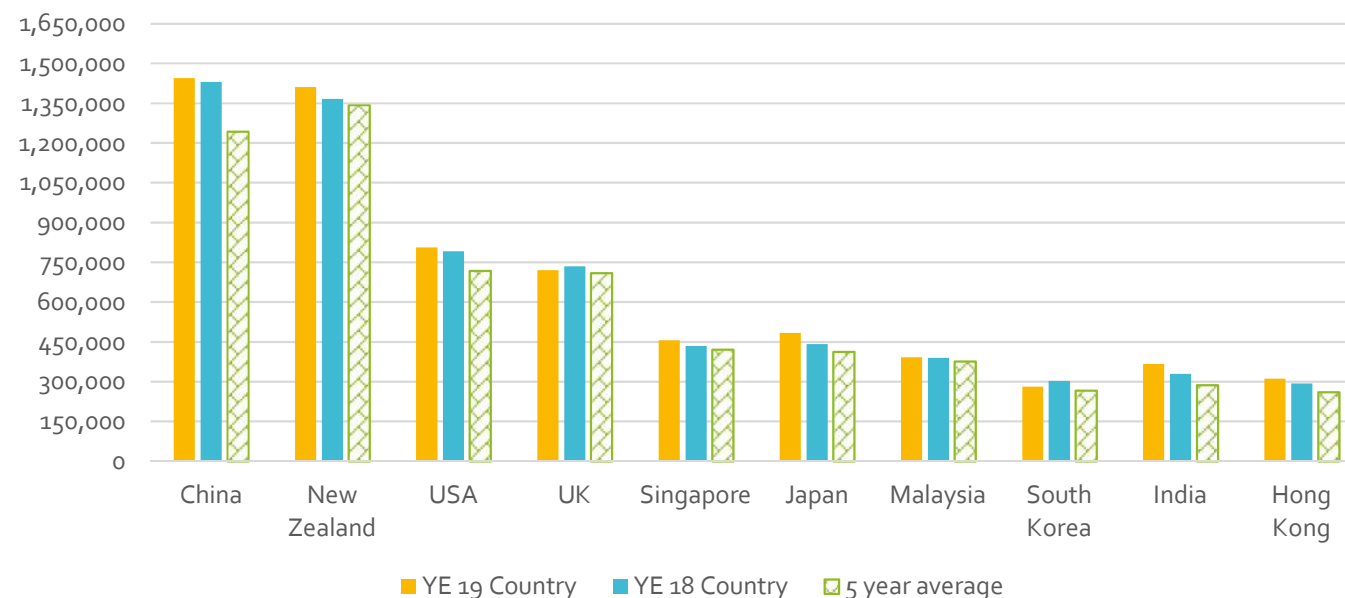
Year end changes to top Australian source markets – May 2019

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

Key Highlight

- **South Korea experienced a 7% decrease between May 2018 and May 2019, however is still tracking 6% above the five-year average.**
- **India is tracking 28% above the five-year average, closely followed by Hong Kong at 20%, and Japan at 17%.**

Destination	Total number of travellers 2018	2018 Year end change	Total number of travellers 2019	2019 Year end change	2019 Performance
China	1,430,600	12.9%	1,445,500	1.0%	Neutral
New Zealand	1,366,400	1.0%	1,410,800	3.2%	Positive
USA	792,800	4.8%	806,900	1.8%	Neutral
UK	735,500	1.2%	721,000	-2.0%	Neutral
Singapore	435,300	-0.4%	456,400	4.8%	Positive
Japan	442,800	3.9%	484,700	9.5%	Positive
Malaysia	390,200	-3.2%	392,700	0.6%	Neutral
South Korea	303,500	4.9%	282,300	-7.0%	Negative
India	329,900	19.2%	367,300	11.3%	Positive
Hong Kong	293,700	11.9%	312,000	6.2%	Positive
National Total	9,033,400	5.8%	9,345,400	3.5%	Positive



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

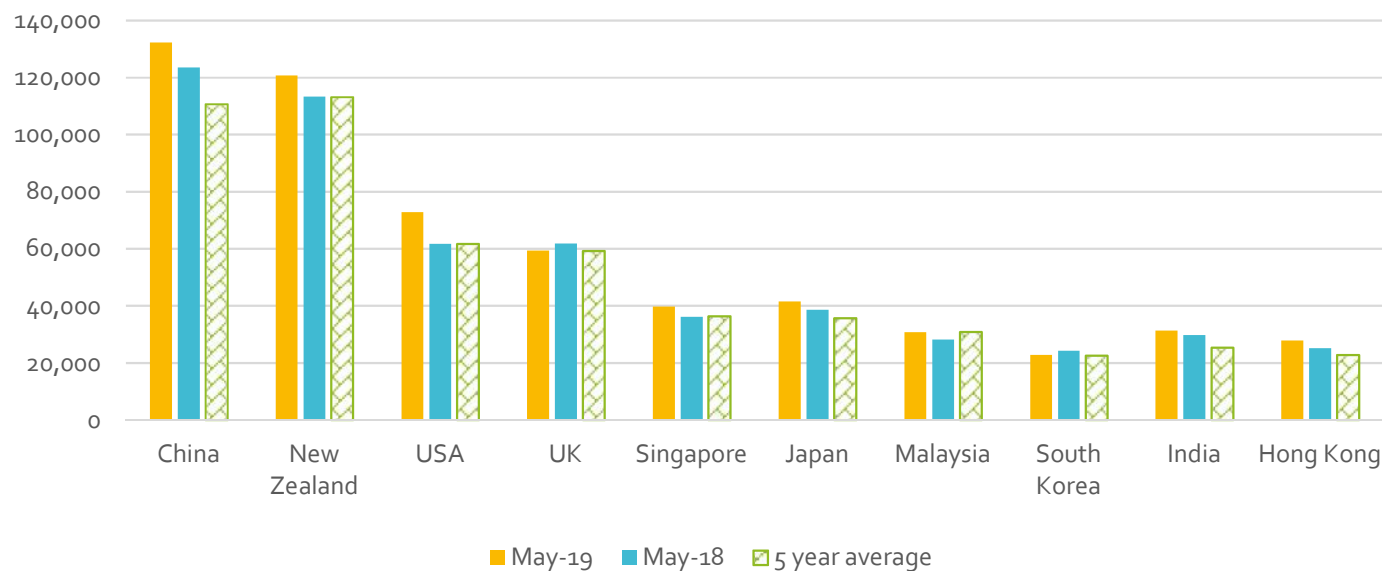
Monthly changes to top Australian source markets – May 2019

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

Key Highlights

- **China, India and Hong Kong continue to remain strong source markets, and are all tracking well above the five-year average.**
- **South Korea experienced a decrease of 6.1% between May 2018 and May 2019, and is currently tracking 2% 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	123,600	11.1%	132,300	7.0%	Positive
New Zealand	113,400	1.7%	120,800	6.5%	Positive
USA	61,800	-5.1%	72,900	18.0%	Positive
UK	61,900	4.4%	59,500	-3.9%	Negative
Singapore	36,200	-6.2%	39,800	9.9%	Positive
Japan	38,700	8.1%	41,600	7.5%	Positive
Malaysia	28,300	-18.7%	30,900	9.2%	Positive
South Korea	24,400	0.0%	22,900	-6.1%	Negative
India	29,900	20.1%	31,400	5.0%	Positive
Hong Kong	25,300	5.9%	28,000	10.7%	Positive
National Total	758,900	4.1%	816,600	7.6%	Positive



Source: May 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%.



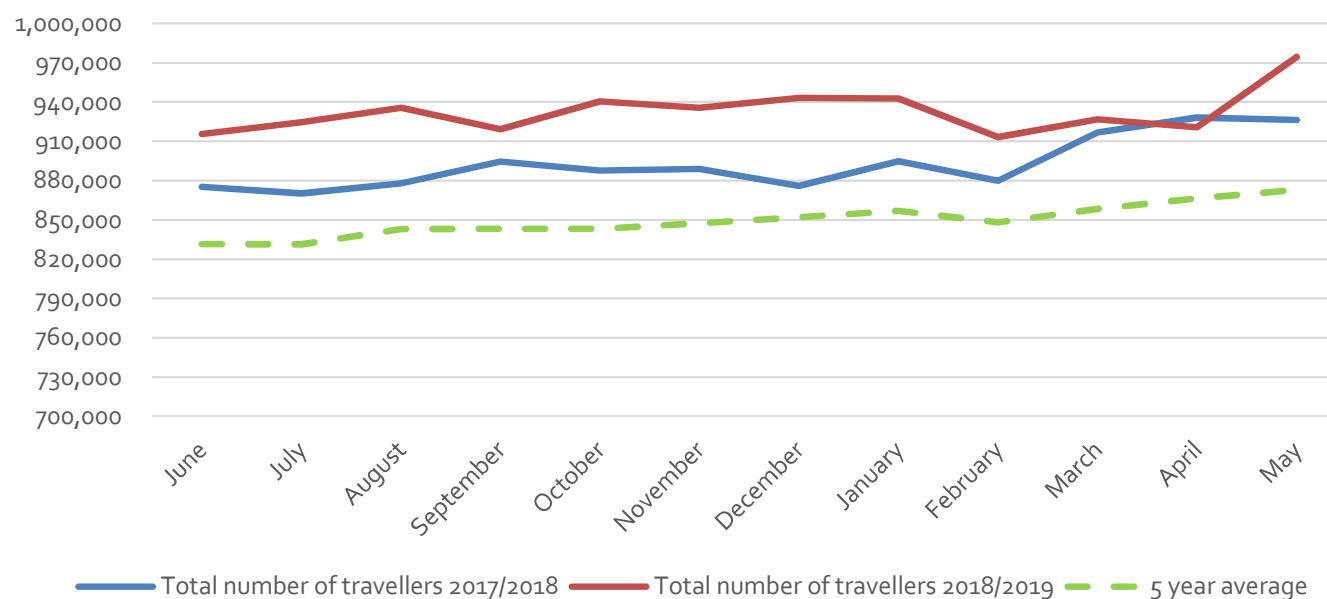
Total outbound Australian travellers – May 2019

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

Key Highlights

- During May 2019, short-term resident returns (974,500 movements) increased by 5.8% when compared with April 2019 (920,900 movements).
- This followed a monthly increase of 1.5% for March 2019 and a monthly decrease of 0.7% for April 2019.
- Australians are displaying a clear appetite for outbound travel, with May 2019 9% above the five-year average.

Month	Total number of travellers 2017/2018	Change on previous year	Total number of travellers 2018/2019	Change on previous year	2019 Performance
June	875,300	6.2%	915,600	4.6%	Positive
July	870,300	4.4%	924,600	6.2%	Positive
August	878,100	4.9%	935,800	6.6%	Positive
September	894,700	6.0%	919,300	2.7%	Positive
October	887,800	5.9%	940,600	5.9%	Positive
November	889,100	5.9%	935,600	5.2%	Positive
December	876,100	0.5%	943,200	7.7%	Positive
January	895,000	4.6%	942,900	5.4%	Positive
February	879,900	-2.0%	913,300	3.8%	Positive
March	917,000	7.2%	926,900	1.1%	Neutral
April	928,200	3.9%	920,900	-0.8%	Neutral
May	926,500	5.3%	974,500	5.2%	Positive
Total	10,718,000	4.3%	11,193,200	4.4%	Positive



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

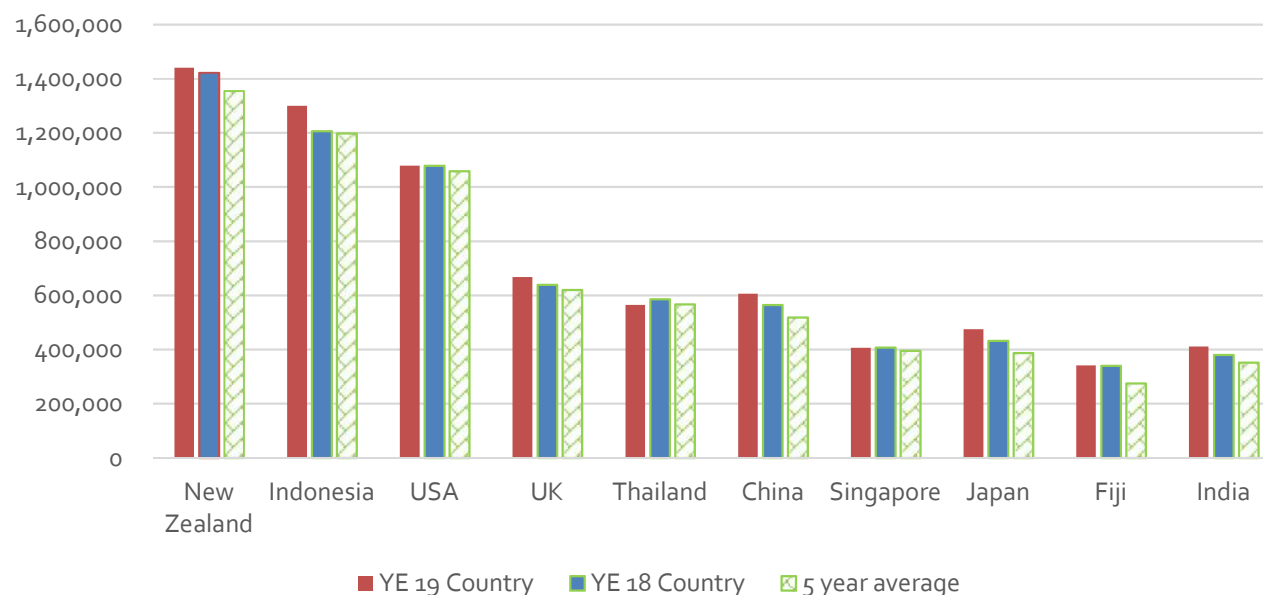
Year end changes to popular international destinations travelled to by Australian's – May 2019

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

Key Highlights

- **Thailand was the only destination to experience negative growth with a decrease of 3.5% over the 12 month period, and is tracking below the five year average.**
- **Travel to Fiji in May 2019 was 25% above the five-year average.**

Destination	Total number of travellers 2018	2018 Year end change	Total number of travellers 2019	2019 Year end change	2019 Performance
New Zealand	1,421,900	1.5%	1,441,400	1.4%	Neutral
Indonesia	1,205,800	-1.8%	1,300,000	7.8%	Positive
USA	1,077,700	-0.5%	1,079,900	0.2%	Neutral
UK	638,800	4.3%	668,600	4.7%	Positive
Thailand	585,900	5.7%	565,600	-3.5%	Negative
China	564,600	12.9%	607,300	7.6%	Positive
Singapore	407,700	2.2%	406,800	-0.2%	Neutral
Japan	431,800	15.3%	476,200	10.3%	Positive
Fiji	339,400	-3.4%	342,800	1.0%	Neutral
India	379,900	11.7%	411,600	8.3%	Positive
National Total	10,718,000	4.3%	11,193,200	4.4%	Positive



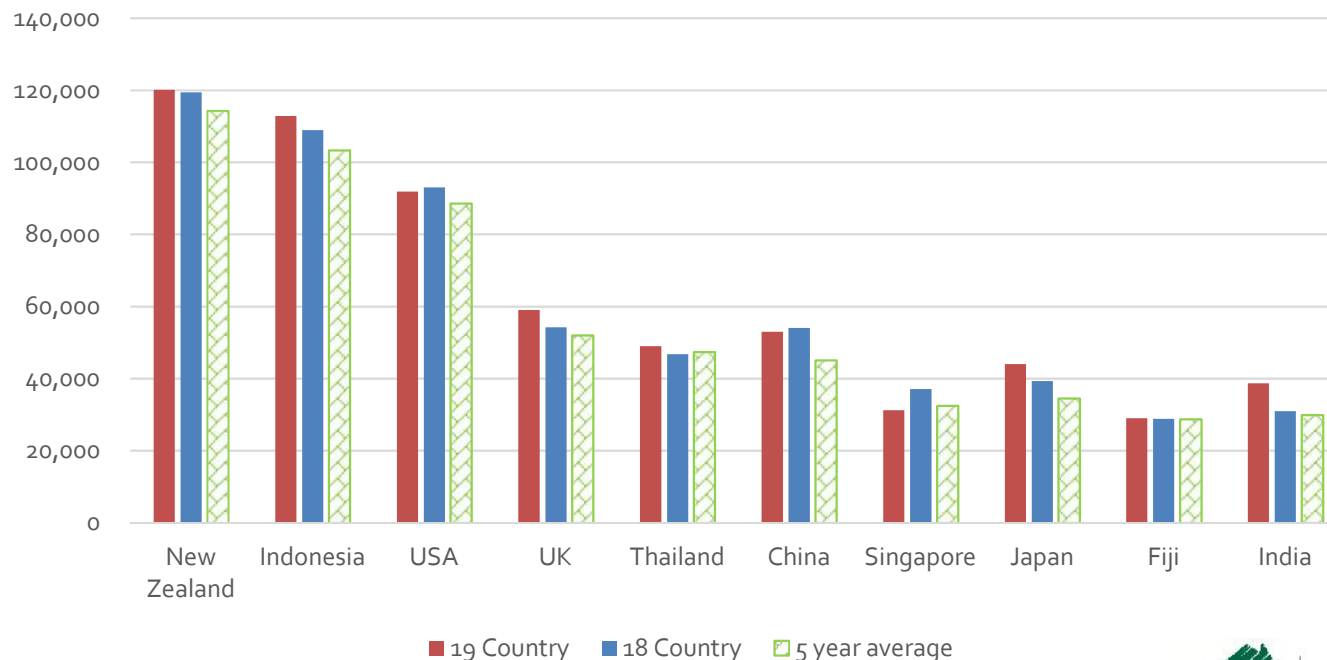
Monthly changes to popular international destinations travelled to by Australian's – May 2019

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

Key Highlights

- **India is tracking well above the five-year average (30%), with the majority of travel due to visiting friends and relatives.**
- **Singapore experienced a 15.6% decrease in travel when compared to the same period last year, and is tracking 3% 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	119,500	-2.8%	120,200	0.6%	Neutral
Indonesia	109,000	12.5%	112,900	3.6%	Positive
USA	93,100	4.5%	91,900	-1.3%	Neutral
UK	54,300	3.0%	59,100	8.8%	Positive
Thailand	46,800	-3.9%	49,000	4.7%	Positive
China	54,100	17.1%	53,000	-2.0%	Neutral
Singapore	37,100	15.6%	31,300	-15.6%	Negative
Japan	39,400	21.2%	44,100	11.9%	Positive
Fiji	28,900	-1.7%	29,100	0.7%	Neutral
India	31,000	5.1%	38,700	24.8%	Positive
National Total	926,500	5.3%	974,500	5.2%	Positive

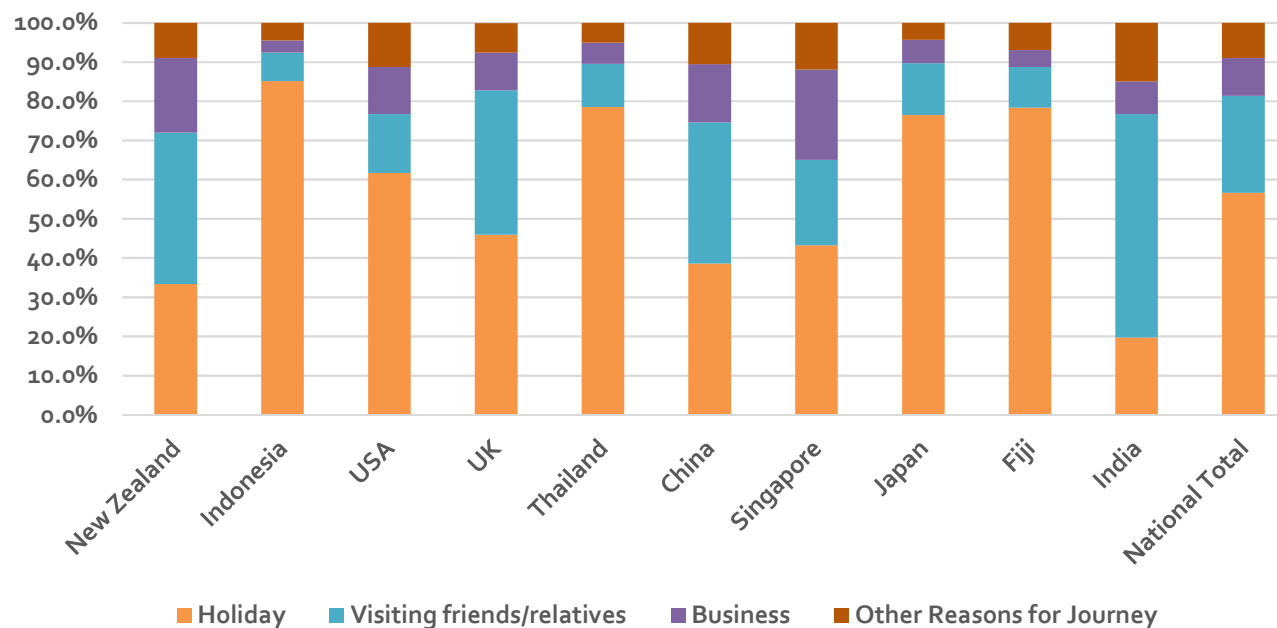


Source: May 2019 Short-term Movement, Residents Returning - Selected Destinations: Seasonally adjusted

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

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

	Holiday	Visiting friends/relatives	Business	Other Reasons for Journey
New Zealand	33.4%	38.6%	19.0%	9.0%
Indonesia	85.1%	7.3%	3.1%	4.5%
USA	61.7%	15.0%	12.0%	11.3%
UK	46.0%	36.8%	9.7%	7.5%
Thailand	78.5%	11.0%	5.4%	5.1%
China	38.7%	36.0%	14.9%	10.5%
Singapore	43.3%	21.8%	23.0%	11.9%
Japan	76.5%	13.3%	5.9%	4.3%
Fiji	78.4%	10.4%	4.3%	6.9%
India	19.8%	57.0%	8.3%	14.9%
National Total	56.7%	24.7%	9.7%	8.9%



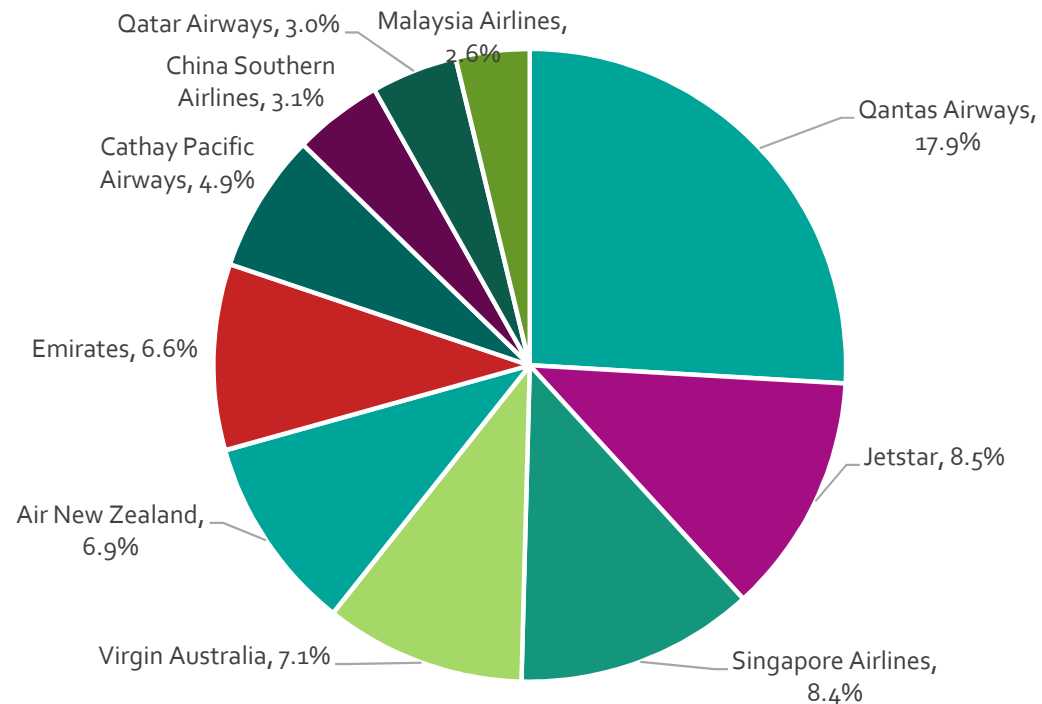
Source: May 2019 Short-term Movement, Residents Returning - Selected Destinations: Original

Airline activity - Month End April 2019

This snapshot displays the market share of the top ten airlines for international travel for the month of April 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	April -18	April -19
Qantas Airways	17.7%	17.9%
Jetstar	9.2%	8.5%
Singapore Airlines	7.8%	8.4%
Emirates	7.3%	6.6%
Air New Zealand	6.9%	6.9%
Virgin Australia	6.1%	7.1%
Cathay Pacific Airways	4.6%	4.9%
China Southern Airlines	2.8%	3.1%
Malaysia Airlines	2.2%	2.6%
Qatar Airways	2.5%	3.0%



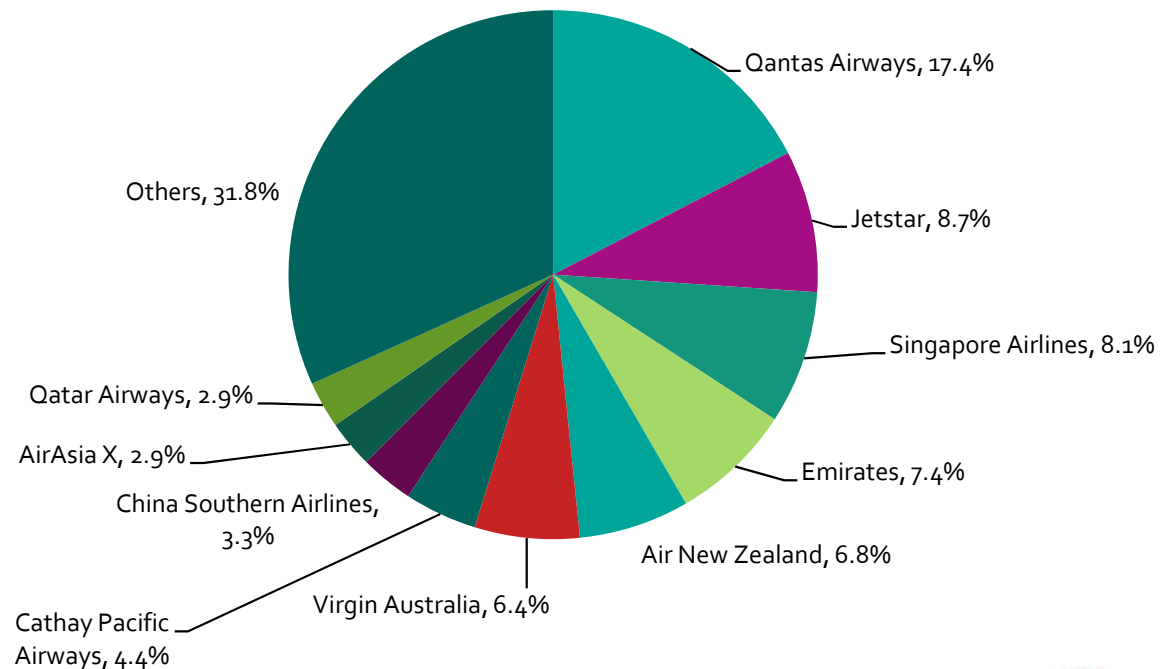
Source: International Airline Activity—Monthly Publications, April 2018 and April 2019

Airline activity – Year End April 2019

This snapshot displays the market share of each airline for international travel of Year end – April 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	April - 18	Year End share of passengers carried	April - 19
Qantas Airways	16.5%	Qantas Airways	17.4%
Jetstar	9.1%	Jetstar	8.7%
Singapore Airlines	8.0%	Singapore Airlines	8.1%
Emirates	8.1%	Emirates	7.4%
Air New Zealand	6.6%	Air New Zealand	6.8%
Virgin Australia	6.1%	Virgin Australia	6.4%
Cathay Pacific Airways	4.6%	Cathay Pacific Airways	4.4%
China Southern Airlines	3.1%	China Southern Airlines	3.3%
AirAsia X	3.6%	AirAsia X	2.9%
Etihad Airways	3.1%	Qatar Airways	2.9%
Others	31.1%	Others	31.8%



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

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