

# AFTA Travel Trends

August 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 June 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 June 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 June 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.

	June YE 2018 Total number of international visitors to Australia <i>Inbound</i>	June YE 2019 Total number of international visitors to Australia <i>Inbound</i>	June YE 2018 Total number of international trips by Australians <i>Outbound</i>	June YE 2019 Total number of international trips by Australians <i>Outbound</i>
China	1,430,400	1,450,000	568,700	611,700
New Zealand	1,372,100	1,410,600	1,418,800	1,443,300
USA	789,700	811,900	1,080,900	1,074,900
UK	735,100	719,100	645,800	667,700
Singapore	436,300	464,800	406,800	404,300
Japan	444,500	488,500	436,700	482,200
Malaysia	396,700	387,100	267,400	268,200
South Korea	334,800	281,000	73,200	79,000
India	334,800	371,700	380,700	417,700
Hong Kong	298,100	312,000	233,900	251,900
Indonesia	334,800	371,700	1,209,100	1,310,600
Thailand	99,500	98,500	582,100	564,700
Fiji	44,900	45,700	339,600	343,600
<b>National Total</b>	<b>9,079,000</b>	<b>9,366,700</b>	<b>10,759,100</b>	<b>11,231,100</b>

Source: June 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%.



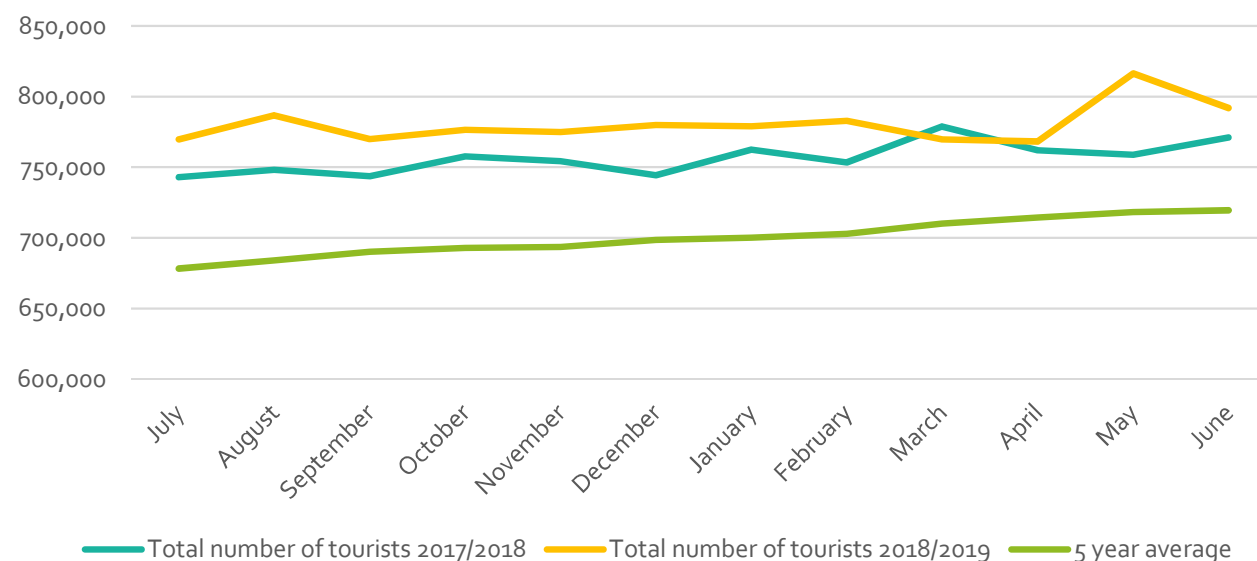
## Total inbound tourists to Australia – June 2019

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

### Key Highlights

- During June 2019, short-term visitor arrivals (791,900 movements) decreased by 3.0% when compared with May 2019 (816,400 movements).
- This followed a monthly decrease of 0.2% for April 2019 and a monthly increase of 6.3% for May 2019.
- During June 2019, short-term visitor arrivals was 10.0% 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
July	743,100	7.3%	769,900	3.6%	Positive
August	748,200	9.1%	786,700	5.1%	Positive
September	743,800	4.0%	770,100	3.5%	Positive
October	757,700	7.0%	776,500	2.5%	Positive
November	754,500	7.4%	775,000	2.7%	Positive
December	744,500	4.6%	780,100	4.8%	Positive
January	762,500	7.3%	779,000	2.2%	Positive
February	753,600	3.8%	783,000	3.9%	Positive
March	778,900	9.9%	769,800	-1.2%	Neutral
April	762,000	0.6%	768,300	0.8%	Neutral
May	759,000	4.0%	816,400	7.6%	Positive
June	771,200	6.2%	791,900	2.7%	Positive
National Total	9,079,000	5.9%	9,366,700	3.2%	Positive



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

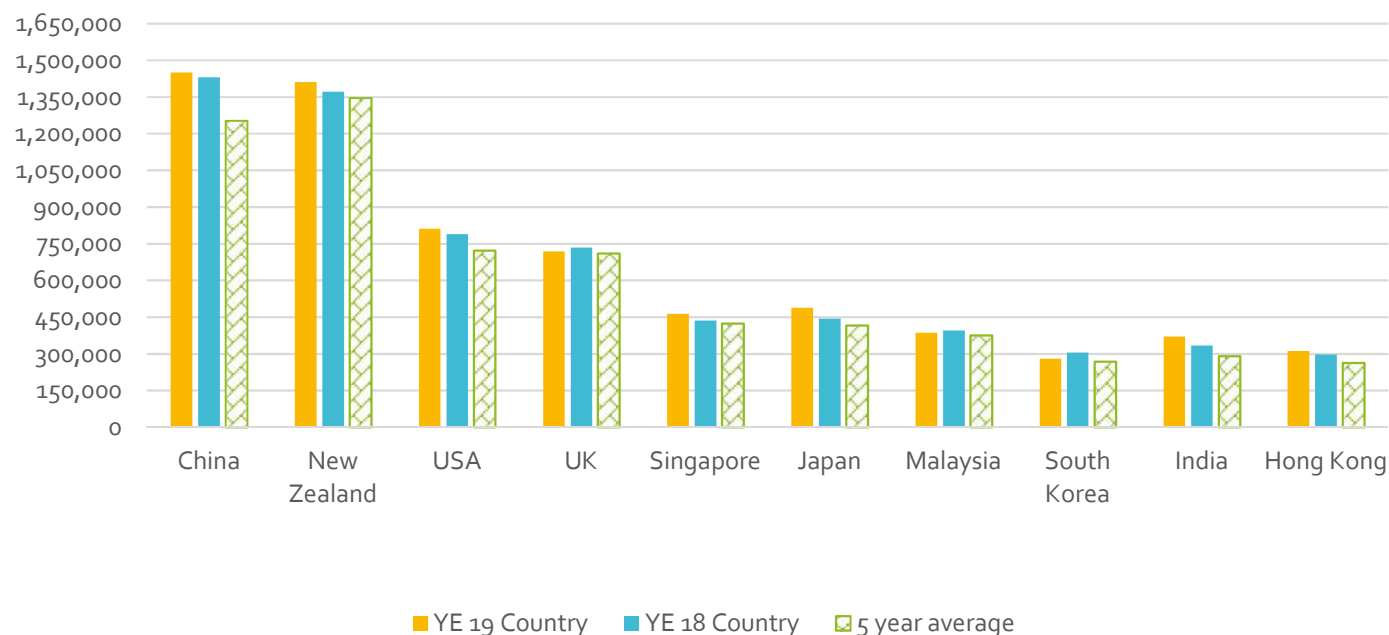
## Year end changes to top Australian source markets – June 2019

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

### Key Highlights

- All markets trending above the five-year average.
- Asian source markets dominate with average growth of 3.3%.
- India delivers an average growth of 15.3% over the last two years.

Destination	Total number of travellers 2018	2018 Year end change	Total number of travellers 2019	2019 Year end change	2019 Performance
China	1,430,400	11.5%	1,450,000	1.4%	Neutral
New Zealand	1,372,100	1.7%	1,410,600	2.8%	Positive
USA	789,700	3.2%	811,900	2.8%	Positive
UK	735,100	1.0%	719,100	-2.2%	Negative
Singapore	436,300	-0.2%	464,800	6.5%	Positive
Japan	444,500	3.7%	488,500	9.9%	Positive
Malaysia	396,700	-1.4%	387,100	-2.4%	Negative
South Korea	305,900	5.8%	281,000	-8.1%	Negative
India	334,800	19.6%	371,700	11.0%	Positive
Hong Kong	298,100	13.7%	312,000	4.7%	Positive
<b>National Total</b>	<b>9,079,000</b>	<b>5.9%</b>	<b>9,366,700</b>	<b>3.2%</b>	<b>Positive</b>



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

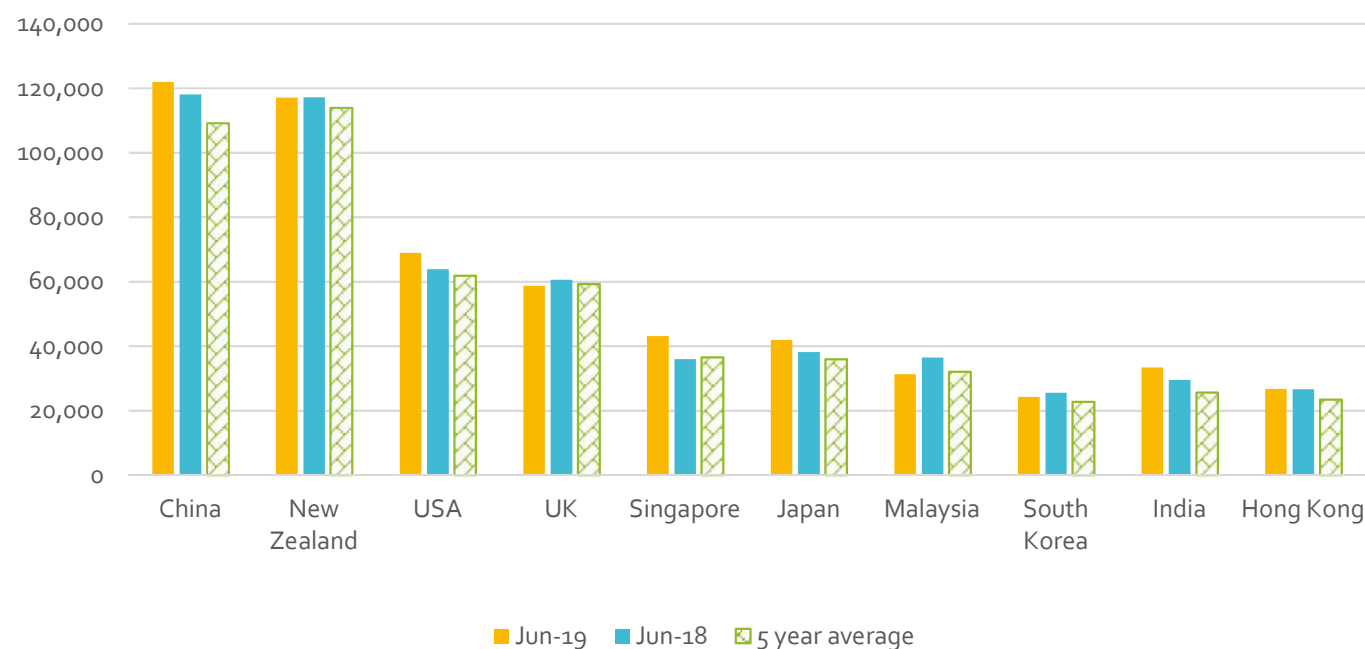
## Monthly changes to top Australian source markets – June 2019

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

### Key Highlights

- **Movements from Hong Kong up an average of 10.3%.**
- **All destinations except UK and Malaysia tracking 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	118,100	-0.2%	122,000	3.3%	Positive
New Zealand	117,300	5.3%	117,200	-0.1%	Neutral
USA	63,900	-4.5%	69,000	8.0%	Positive
UK	60,700	-0.7%	58,800	-3.1%	Negative
Singapore	36,000	0.3%	43,200	20.0%	Positive
Japan	38,200	4.4%	42,000	9.9%	Positive
Malaysia	36,500	22.5%	31,400	-14.0%	Negative
South Korea	25,600	9.4%	24,300	-5.1%	Negative
India	29,600	18.9%	33,500	13.2%	Positive
Hong Kong	26,700	20.3%	26,800	0.4%	Neutral
<b>National Total</b>	<b>771,200</b>	<b>6.2%</b>	<b>791,900</b>	<b>2.7%</b>	<b>Positive</b>



Source: June 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 – June 2019

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

### Key Highlights

- During June 2019, short-term resident returns (953,700 movements) decreased by 2.3% when compared with May 2019 (976,400 movements).
- This followed a monthly decrease of 0.7% for April 2019 and a monthly increase of 6.0% for May 2019.
- During June 2019, short-term resident returns was 9.4% 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
July	869,800	4.3%	924,400	6.3%	Positive
August	878,000	4.9%	935,400	6.5%	Positive
September	895,600	6.1%	919,000	2.6%	Positive
October	887,100	5.9%	940,600	6.0%	Positive
November	888,900	5.7%	935,500	5.2%	Positive
December	876,300	0.5%	942,400	7.5%	Positive
January	895,000	4.6%	942,700	5.3%	Positive
February	879,300	-2.0%	912,600	3.8%	Positive
March	917,500	7.2%	927,400	1.1%	Neutral
April	926,500	3.8%	921,000	-0.6%	Neutral
May	928,100	5.3%	976,400	5.2%	Positive
June	917,000	4.7%	953,700	4.0%	Positive
<b>Total</b>	<b>10,759,100</b>	<b>4.2%</b>	<b>11,231,100</b>	<b>4.4%</b>	<b>Positive</b>



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

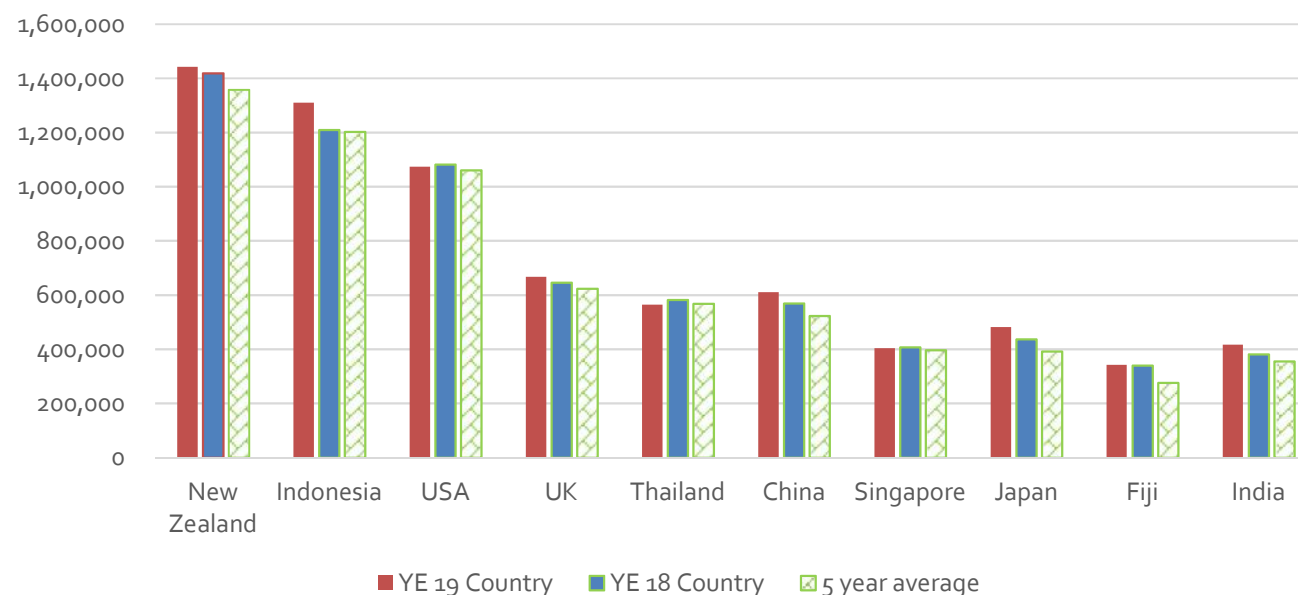
## Year end changes to popular international destinations travelled to by Australian's – June 2019

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

### Key Highlights

- **National outbound travel tracking 8% above the five-year average.**
- **The top 3 destinations that have experienced the largest jump in movements between 2014 and 2019 are New Zealand (216,500), Japan (214,200) and China (205,800).**
- **Thailand is the only destination to experience a decline in movements over the last five years (-200 movements).**

Destination	Total number of travellers 2018	2018 Year end change	Total number of travellers 2019	2019 Year end change	2019 Performance
New Zealand	1,418,800	0.5%	1,443,300	1.7%	Neutral
Indonesia	1,209,100	-0.9%	1,310,600	8.4%	Positive
USA	1,080,900	-0.5%	1,074,900	-0.6%	Neutral
UK	645,800	4.8%	667,700	3.4%	Positive
Thailand	582,100	4.2%	564,700	-3.0%	Negative
China	568,700	12.2%	611,700	7.6%	Positive
Singapore	406,800	0.3%	404,300	-0.6%	Neutral
Japan	436,700	14.6%	482,200	10.4%	Positive
Fiji	339,600	-3.4%	343,600	1.2%	Neutral
India	380,700	10.5%	417,700	9.7%	Positive
<b>National Total</b>	<b>10,759,100</b>	<b>4.2%</b>	<b>11,231,100</b>	<b>4.4%</b>	<b>Positive</b>



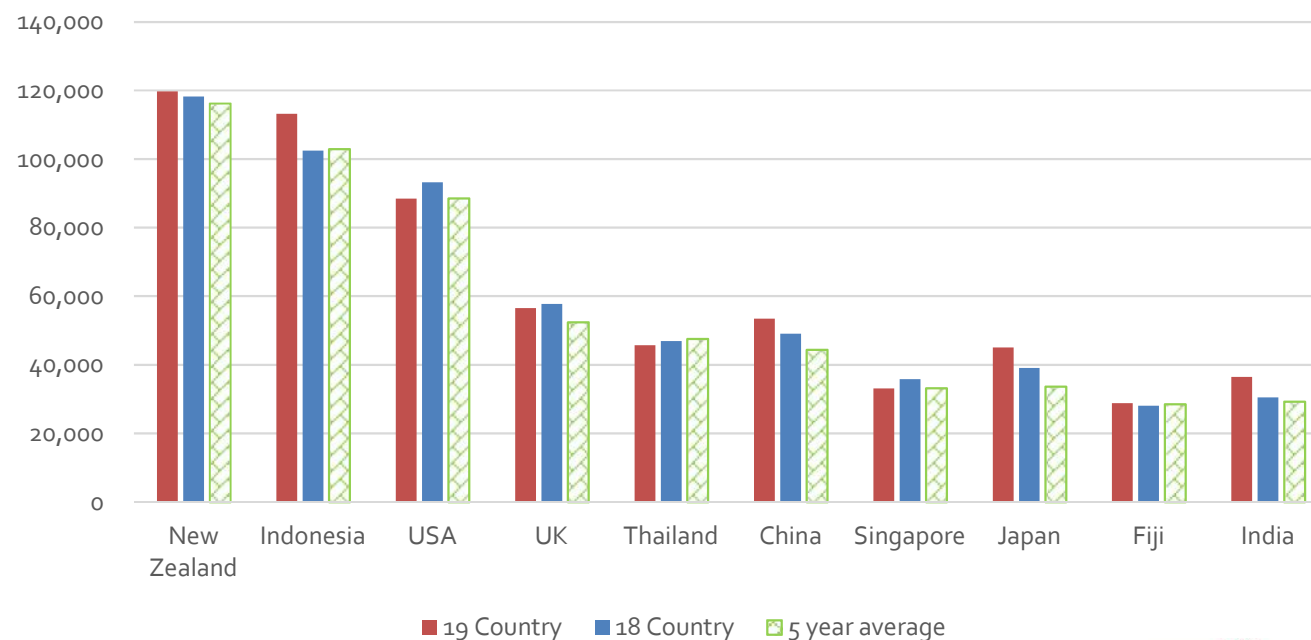
## Monthly changes to popular international destinations travelled to by Australian's – June 2019

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

### Key Highlights

- The national total is tracking 9.4% above the five-year average.
- UK experiences 3.4% increase for year end change, but down 2.1% in June 2019.

Destination	Total number of travellers 2018	Change to previous year	Total number of travellers 2019	Change to previous year	2019 Performance
New Zealand	118,300	-2.4%	119,800	1.3%	Neutral
Indonesia	102,500	3.2%	113,200	10.4%	Positive
USA	93,300	3.8%	88,500	-5.1%	Negative
UK	57,800	13.1%	56,600	-2.1%	Negative
Thailand	47,000	-7.3%	45,800	-2.6%	Negative
China	49,100	8.9%	53,500	9.0%	Positive
Singapore	35,900	-2.4%	33,200	-7.5%	Negative
Japan	39,100	15.3%	45,100	15.3%	Positive
Fiji	28,100	0.7%	28,900	2.8%	Positive
India	30,600	2.3%	36,500	19.3%	Positive
<b>National Total</b>	<b>917,000</b>	<b>4.7%</b>	<b>953,700</b>	<b>4.0%</b>	<b>Positive</b>



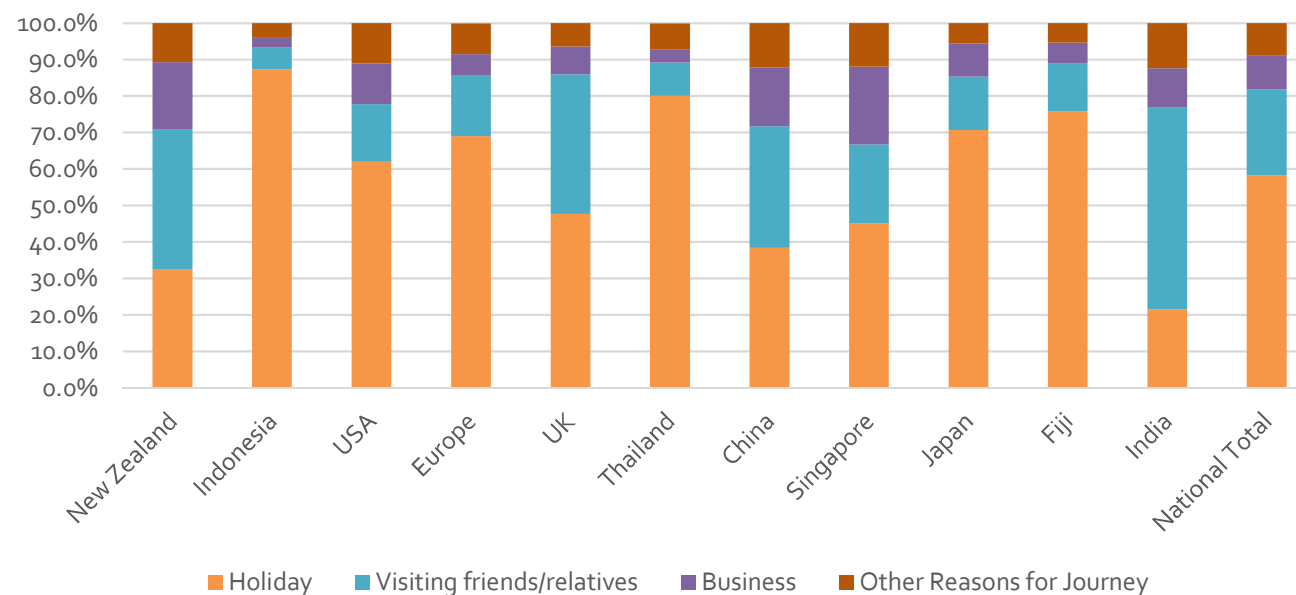
Source: June 2019 Short-term Movement, Residents Returning - Selected Destinations: Seasonally adjusted



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

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

	Holiday	Visiting friends/relatives	Business	Other Reasons for Journey
New Zealand	32.5%	38.5%	18.4%	10.6%
Indonesia	87.3%	6.2%	2.5%	4.0%
USA	62.1%	15.7%	11.2%	11.0%
UK	69.1%	16.8%	5.7%	8.4%
Europe	47.7%	38.3%	7.6%	6.4%
Thailand	80.1%	9.1%	3.5%	7.2%
China	38.5%	33.3%	16.0%	12.2%
Singapore	45.1%	21.6%	21.4%	11.9%
Japan	70.7%	14.7%	9.1%	5.5%
Fiji	75.9%	13.2%	5.6%	5.4%
India	21.6%	55.3%	10.8%	12.3%
<b>National Total</b>	<b>58.4%</b>	<b>23.4%</b>	<b>9.3%</b>	<b>8.9%</b>



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

International scheduled passenger traffic in May 2019 was 3.208 million compared to 3.027 million in May 2018 – an increase of 6.0 per cent.



Source: International Airline Activity—Monthly Publications, May 2019

## Airline activity - Month End May 2019

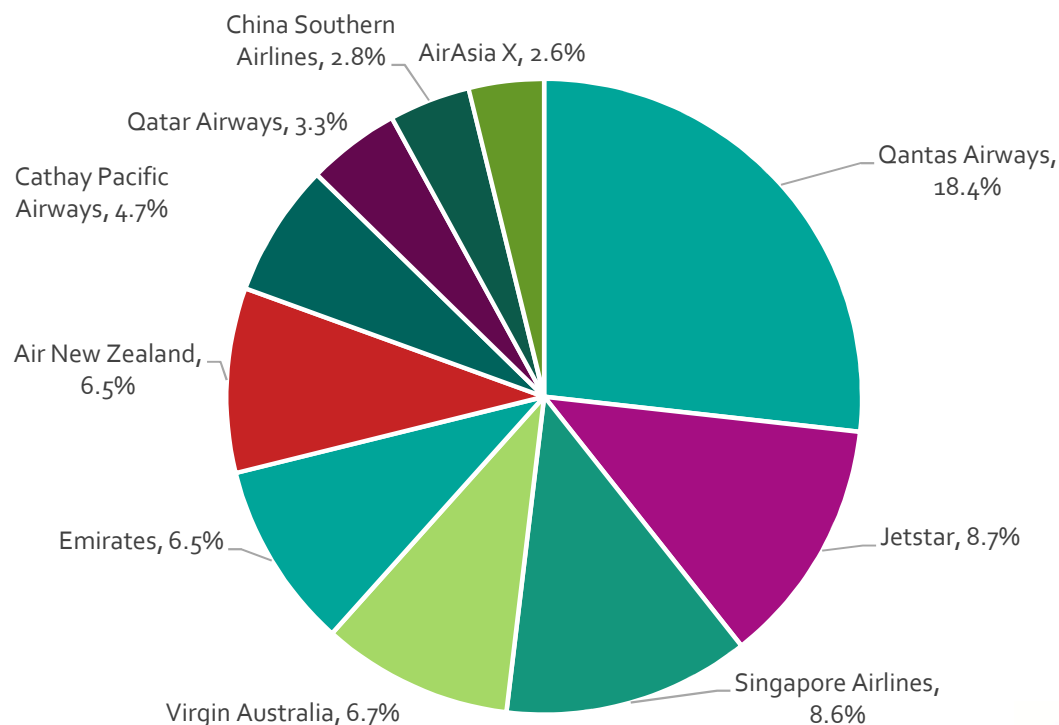
This snapshot displays the market share of the top ten airlines for international travel for the month of May 2019.

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.

### Key Highlights

- **The Qantas group – Qantas Airways, Jetstar and Jetstar Asia (0.2%) accounted for 27.3% of total passenger carriage in May 2019 (down from 27.6% in May 2018).**
- **The share of passenger traffic accounted for by Australian designated airlines has increased slightly from 33.6% in May 2018 to 33.8% in May 2019.**

Monthly Share of passengers carried	May -18	May -19
<b>Qantas Airways</b>	18.0%	18.4%
<b>Jetstar</b>	9.4%	8.7%
<b>Singapore Airlines</b>	8.4%	8.6%
<b>Virgin Australia</b>	6.1%	6.7%
<b>Emirates</b>	7.2%	6.5%
<b>Air New Zealand</b>	6.5%	6.5%
<b>Cathay Pacific Airways</b>	4.1%	4.7%
<b>Qatar Airways</b>	2.9%	3.3%
<b>China Southern Airlines</b>	2.8%	2.8%
<b>AirAsia X</b>	3.1%	2.6%



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

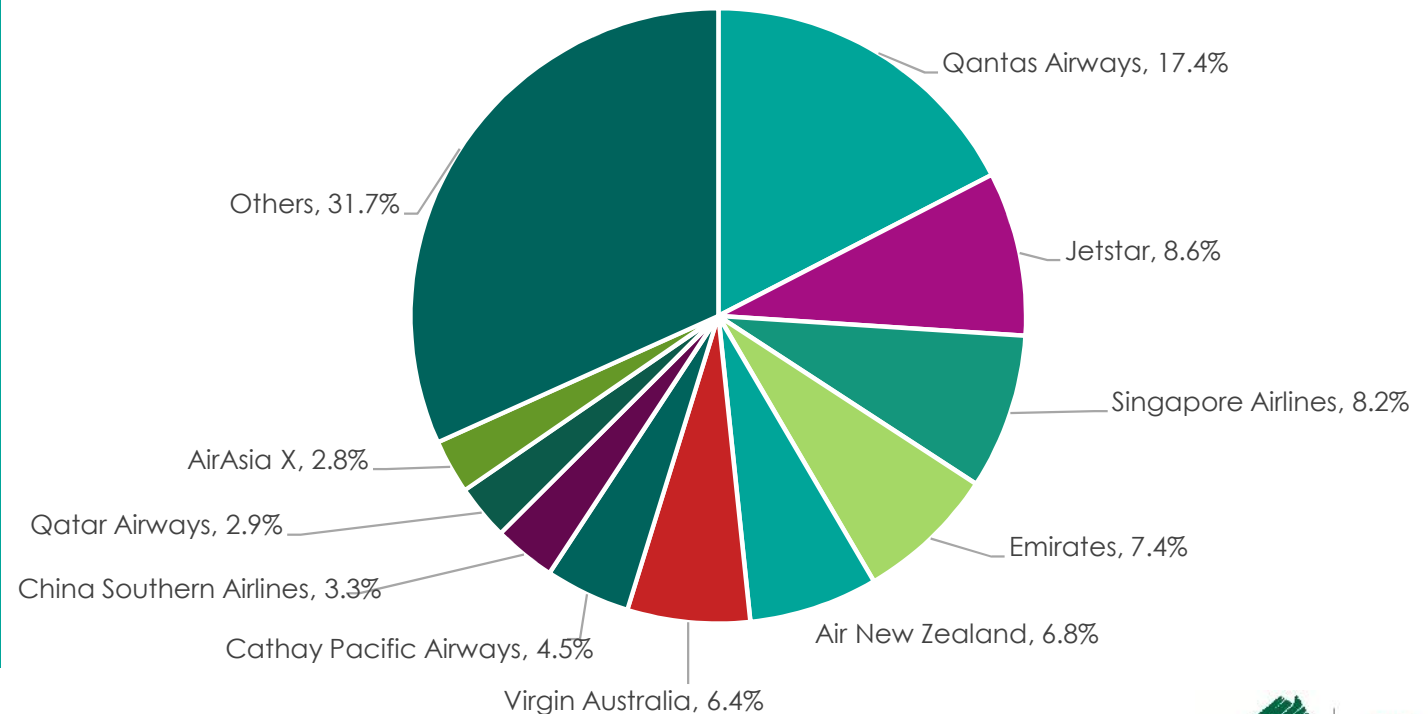


## Airline activity – Year End May 2019

This snapshot displays the market share of each airline for international travel of Year end – May 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	May - 18	Year End share of passengers carried	May - 19
<b>Qantas Airways</b>	16.7%	<b>Qantas Airways</b>	17.4%
<b>Jetstar</b>	9.1%	<b>Jetstar</b>	8.6%
<b>Singapore Airlines</b>	8.0%	<b>Singapore Airlines</b>	8.2%
<b>Emirates</b>	8.1%	<b>Emirates</b>	7.4%
<b>Air New Zealand</b>	6.6%	<b>Air New Zealand</b>	6.8%
<b>Virgin Australia</b>	6.1%	<b>Virgin Australia</b>	6.4%
<b>Cathay Pacific Airways</b>	4.5%	<b>Cathay Pacific Airways</b>	4.5%
<b>China Southern Airlines</b>	3.1%	<b>China Southern Airlines</b>	3.3%
<b>Qatar Airways</b>	3.0%	<b>Qatar Airways</b>	2.9%
<b>AirAsia X</b>	3.6%	<b>AirAsia X</b>	2.8%
<b>Others</b>	31.2%	<b>Others</b>	31.7%



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

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