

AFTA Travel Trends

September 2019



Inbound and Outbound overview

Introduction

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

	July YE 2018 Total number of international visitors to Australia <i>Inbound</i>	July YE 2019 Total number of international visitors to Australia <i>Inbound</i>	July YE 2018 Total number of international trips by Australians <i>Outbound</i>	July YE 2019 Total number of international trips by Australians <i>Outbound</i>
China	1,431,400	1,447,200	574,000	609,400
New Zealand	1,372,400	1,411,100	1,421,200	1,443,700
USA	786,500	817,900	1,082,800	1,070,400
UK	733,600	720,500	648,200	667,400
Singapore	438,400	468,800	412,400	402,700
Japan	446,500	491,700	445,300	486,500
Malaysia	398,500	386,100	266,100	268,200
South Korea	308,200	280,300	72,600	79,900
India	339,100	376,000	384,500	419,200
Hong Kong	301,900	313,400	237,800	250,400
Indonesia	196,000	213,600	1,212,300	1,324,400
Thailand	100,100	98,300	580,100	559,200
Fiji	45,100	45,600	338,400	345,800
National Total	9,106,900	9,387,500	10,816,900	11,233,000

Source: July 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%.



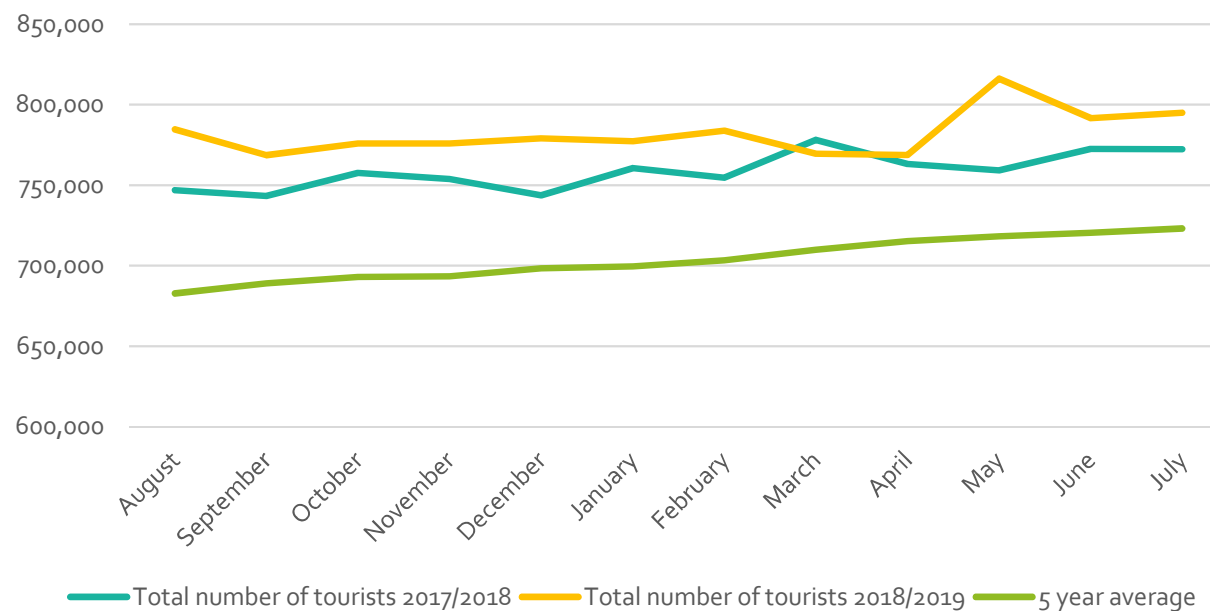
Total inbound tourists to Australia – July 2019

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

Key Highlights

- During July 2019, short-term visitor arrivals (795,100 movements) increased by 0.43% when compared with June 2019 (791,700 movements).
- During July 2019 short-term visitor arrivals were tracking 11% 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
August	747,000	9.1%	784,700	5.0%	Positive
September	743,400	4.0%	768,700	3.4%	Positive
October	757,700	7.1%	776,000	2.4%	Positive
November	753,900	7.3%	776,000	2.9%	Positive
December	743,800	4.3%	779,200	4.8%	Positive
January	760,700	6.8%	777,300	2.2%	Positive
February	754,700	4.2%	784,000	3.9%	Positive
March	778,200	9.7%	769,700	-1.1%	Neutral
April	763,200	0.9%	768,900	0.7%	Neutral
May	759,300	4.1%	816,200	7.5%	Positive
June	772,600	6.1%	791,700	2.5%	Positive
July	772,400	3.8%	795,100	2.9%	Positive
National Total	9,106,900	5.6%	9,387,500	3.1%	Positive



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

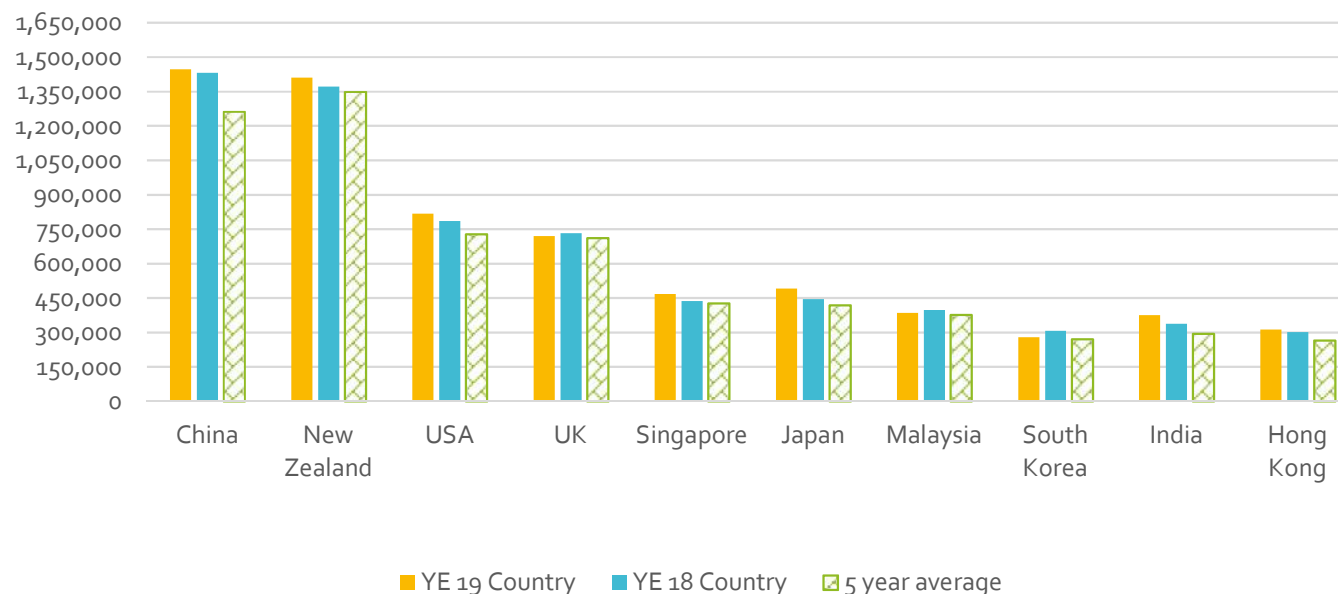
Year end changes to top Australian source markets – July 2019

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

Key Highlights

- **July 2019 reported China as the largest source country, accounting for 15.4% of all visitor arrivals. This was followed closely by New Zealand (15.0%).**
- **India (28%), Hong Kong (18%) and Japan (18%) all tracking well 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
China	1,431,400	9.6%	1,447,200	1.1%	Neutral
New Zealand	1,372,400	1.4%	1,411,100	2.8%	Positive
USA	786,500	2.0%	817,900	4.0%	Positive
UK	733,600	1.1%	720,500	-1.8%	Neutral
Singapore	438,400	0.3%	468,800	6.9%	Positive
Japan	446,500	3.7%	491,700	10.1%	Positive
Malaysia	398,500	-0.6%	386,100	-3.1%	Negative
South Korea	308,200	6.7%	280,300	-9.1%	Negative
India	339,100	19.6%	376,000	10.9%	Positive
Hong Kong	301,900	14.2%	313,400	3.8%	Positive
National Total	9,106,900	5.6%	9,387,500	3.1%	Positive



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

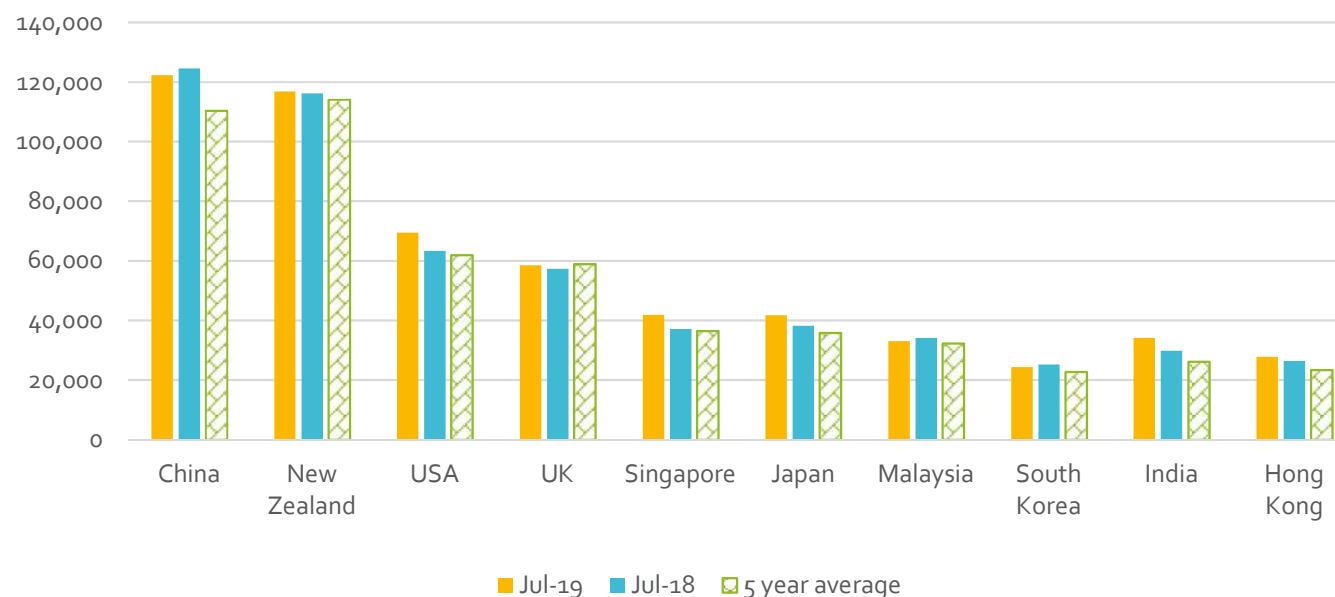
Monthly changes to top Australian source markets – July 2019

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

Key Highlights

- Among the top ten source countries, the highest annual increases were recorded for India (14.4%), Singapore (12.6%) and USA (9.6%).
- All travellers are asked their intended address in Australia upon arrival. For those who visited Australia in July 2019, compared to the same month of the previous year, there was an increase of 11.1% more visitors to WA, and a decrease of 7.8% fewer visitors to the ACT.

Destination	Total number of travellers 2018	Change on previous year	Total number of travellers 2019	Change on previous year	2019 Performance
China	124,600	0.9%	122,300	-1.8%	Neutral
New Zealand	116,200	0.4%	116,900	0.6%	Neutral
USA	63,400	-5.1%	69,500	9.6%	Positive
UK	57,400	-2.2%	58,600	2.1%	Positive
Singapore	37,200	5.4%	41,900	12.6%	Positive
Japan	38,300	5.8%	41,800	9.1%	Positive
Malaysia	34,200	5.9%	33,100	-3.2%	Negative
South Korea	25,300	9.5%	24,400	-3.6%	Negative
India	29,900	17.7%	34,200	14.4%	Positive
Hong Kong	26,500	16.7%	27,900	5.3%	Positive
National Total	772,400	3.8%	795,100	2.9%	Positive



Source: July 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%.



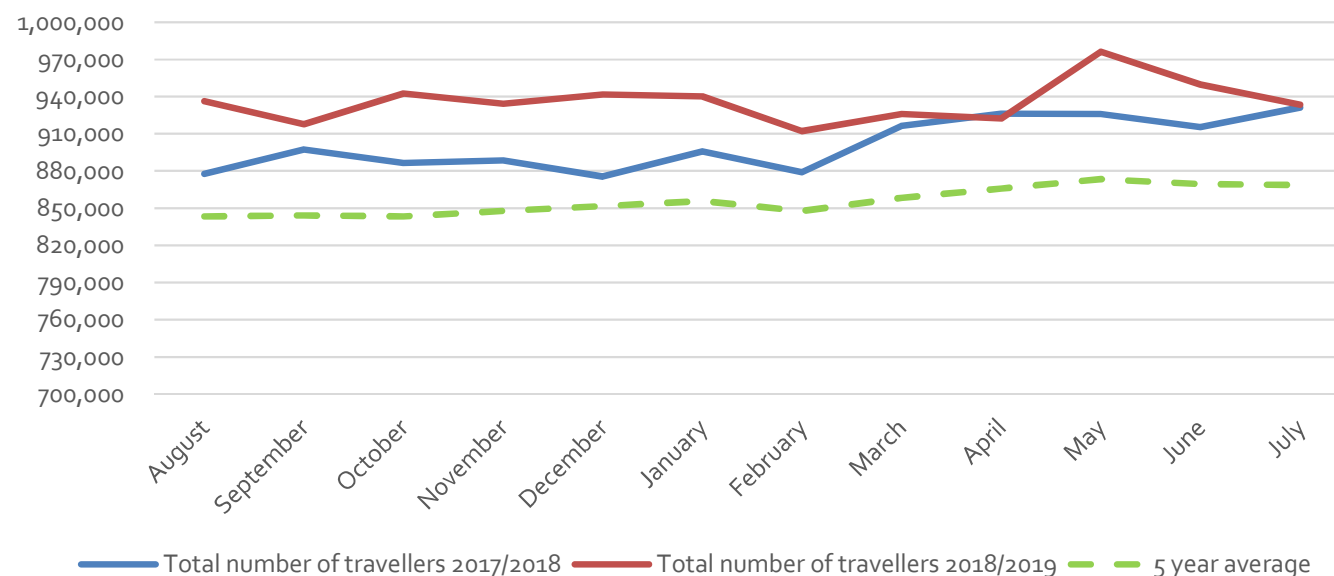
Total outbound Australian travellers – July 2019

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

Key Highlights

- During July 2019, short-term resident returns (933,500 movements) decreased by 1.71% when compared with June 2019 (949,700 movements).
- During July 2019, short-term resident returns was 7.4% 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
August	877,800	4.7%	936,400	6.7%	Positive
September	897,500	6.2%	917,800	2.3%	Positive
October	886,600	5.9%	942,500	6.3%	Positive
November	888,600	5.6%	934,300	5.1%	Positive
December	875,600	0.4%	941,700	7.5%	Positive
January	895,800	4.9%	940,200	5.0%	Positive
February	879,100	-2.0%	912,200	3.8%	Positive
March	916,600	7.1%	926,100	1.0%	Neutral
April	926,400	4.0%	922,400	-0.4%	Neutral
May	926,100	5.0%	976,200	5.4%	Positive
June	915,500	4.8%	949,700	3.7%	Positive
July	931,300	6.5%	933,500	0.2%	Neutral
National Total	10,816,900	4.4%	11,233,000	3.8%	Positive



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

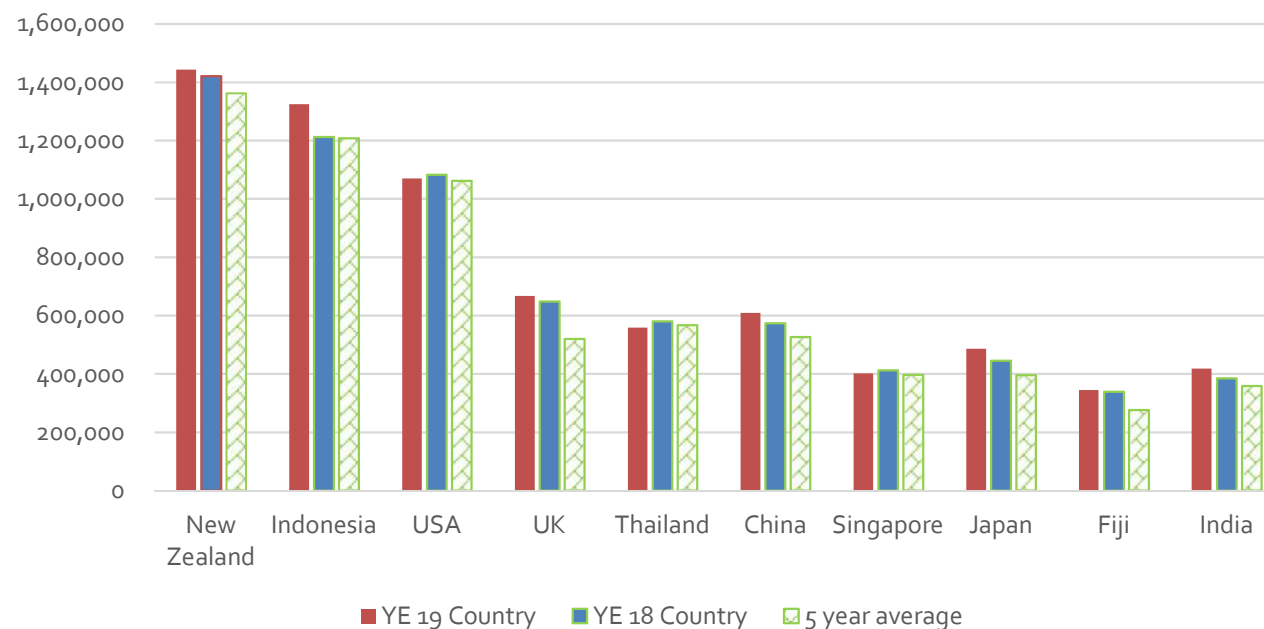
Year end changes to popular international destinations travelled to by Australians – July 2019

This section displays the performance of the major destinations Australians are travelling to as of July Year end 2018 and 2019.

Key Highlights

- **New Zealand is reported as the most popular destination, accounting for 13% of all those returning.**
- **National outbound travel tracking 8% 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	1,421,200	0.4%	1,443,700	1.6%	Neutral
Indonesia	1,212,300	-0.4%	1,324,400	9.2%	Positive
USA	1,082,800	-0.3%	1,070,400	-1.1%	Neutral
UK	648,200	4.9%	667,400	3.0%	Positive
Thailand	580,100	3.3%	559,200	-3.6%	Negative
China	574,000	11.9%	609,400	6.2%	Positive
Singapore	412,400	2.3%	402,700	-2.4%	Negative
Japan	445,300	17.2%	486,500	9.3%	Positive
Fiji	338,400	-3.6%	345,800	2.2%	Positive
India	384,500	10.0%	419,200	9.0%	Positive
National Total	10,816,900	4.4%	11,233,000	3.8%	Positive



Monthly changes to popular international destinations travelled to by Australians – July 2019

This section displays the performance of the major destinations Australians are travelling to, comparing July 2018 to July 2019

Key Highlights

- The national total is tracking 7.4% above the five-year average.
- China experiences 6.2% increase for year end change, but down 4.8% in July 2019.

Destination	Total number of travellers 2018	Change to previous year	Total number of travellers 2019	Change to previous year	2019 Performance
New Zealand	119,900	2.1%	120,100	0.2%	Neutral
Indonesia	103,400	2.7%	116,500	12.7%	Positive
USA	91,900	2.3%	87,700	-4.6%	Negative
UK	54,600	6.0%	55,200	1.1%	Neutral
Thailand	47,300	-3.3%	42,300	-10.6%	Negative
China	50,100	11.3%	47,700	-4.8%	Negative
Singapore	35,500	17.9%	33,900	-4.5%	Negative
Japan	39,000	28.3%	43,100	10.5%	Positive
Fiji	27,600	-5.2%	29,900	8.3%	Positive
India	34,100	10.4%	35,100	2.9%	Positive
National Total	931,300	6.5%	933,500	0.2%	Neutral

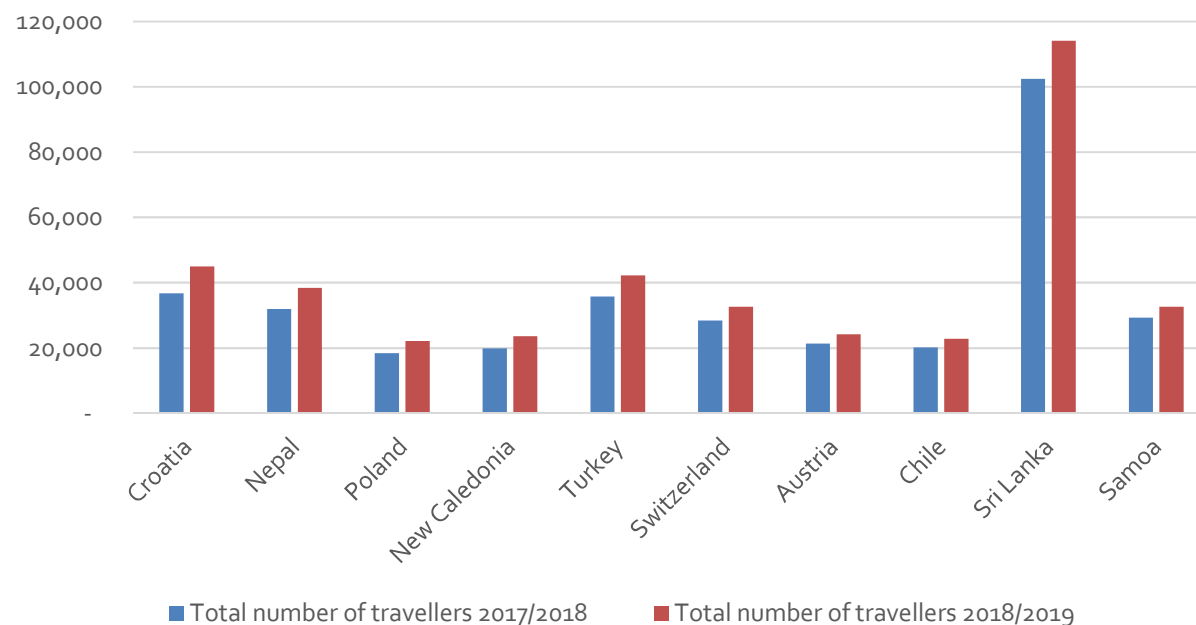


Source: July 2019 Short-term Movement, Residents Returning - Selected Destinations: Seasonally adjusted

Year end changes to countries experiencing significant growth in visitation by Australian residents – July 2019

This section displays the top ten countries experiencing the highest Year end growth in visitation by Australian residents, as of July Year end 2019.

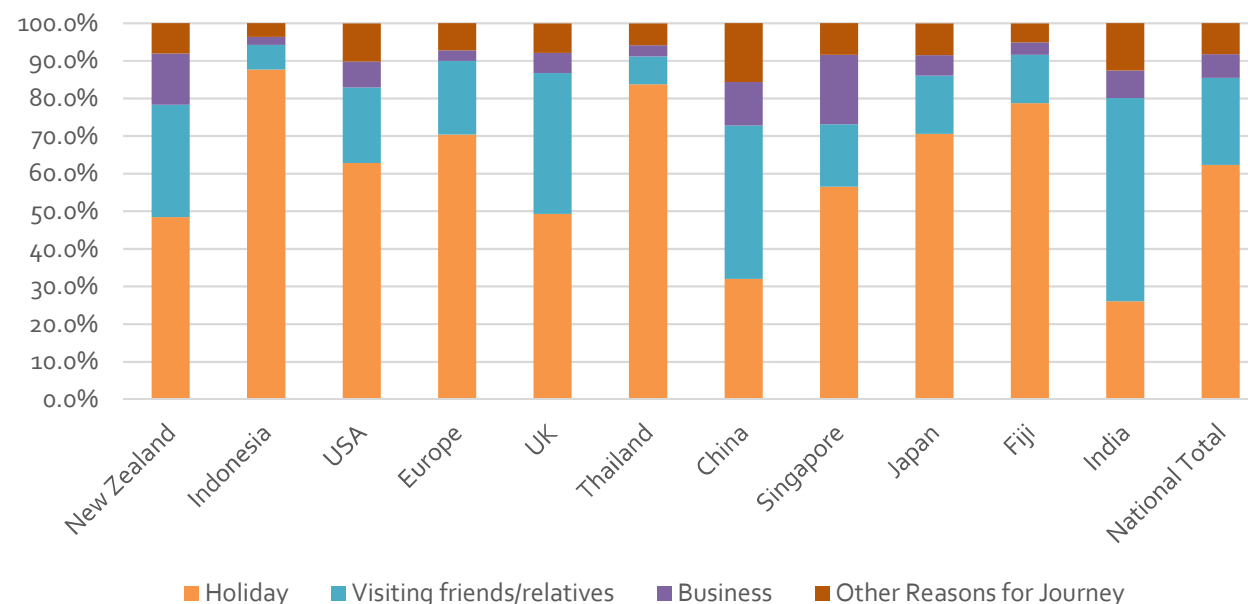
	Total number of travellers 2018	2018 Year end change	Total number of travellers 2019	2019 Year end change
Croatia	36,800	-7.8%	45,000	22.3%
Nepal	32,000	8.1%	38,500	20.3%
Poland	18,500	-3.1%	22,200	20.0%
New Caledonia	20,000	-11.5%	23,700	18.5%
Turkey	35,800	35.1%	42,300	18.2%
Switzerland	28,500	-6.6%	32,700	14.7%
Austria	21,400	4.9%	24,300	13.6%
Chile	20,300	15.3%	22,900	12.8%
Sri Lanka	102,500	20.4%	114,100	11.3%
Samoa	29,400	7.7%	32,700	11.2%



Reasons to travel to popular international destinations by Australians – July 2019

This section displays the performance of the popular destinations visited by Australians by reason of travel in July 2019.

	Holiday	Visiting friends/relatives	Business	Other Reasons for Journey
New Zealand	48.5%	29.9%	13.6%	8.0%
Indonesia	87.7%	6.5%	2.1%	3.7%
USA	62.8%	20.1%	6.8%	10.2%
UK	70.4%	19.6%	2.8%	7.2%
Europe	49.3%	37.4%	5.4%	7.8%
Thailand	83.8%	7.4%	3.0%	5.8%
China	32.1%	40.7%	11.6%	15.7%
Singapore	56.6%	16.6%	18.4%	8.4%
Japan	70.6%	15.5%	5.4%	8.5%
Fiji	78.8%	12.9%	3.3%	5.0%
India	26.1%	54.0%	7.4%	12.5%
National Total	62.4%	23.1%	6.3%	8.2%



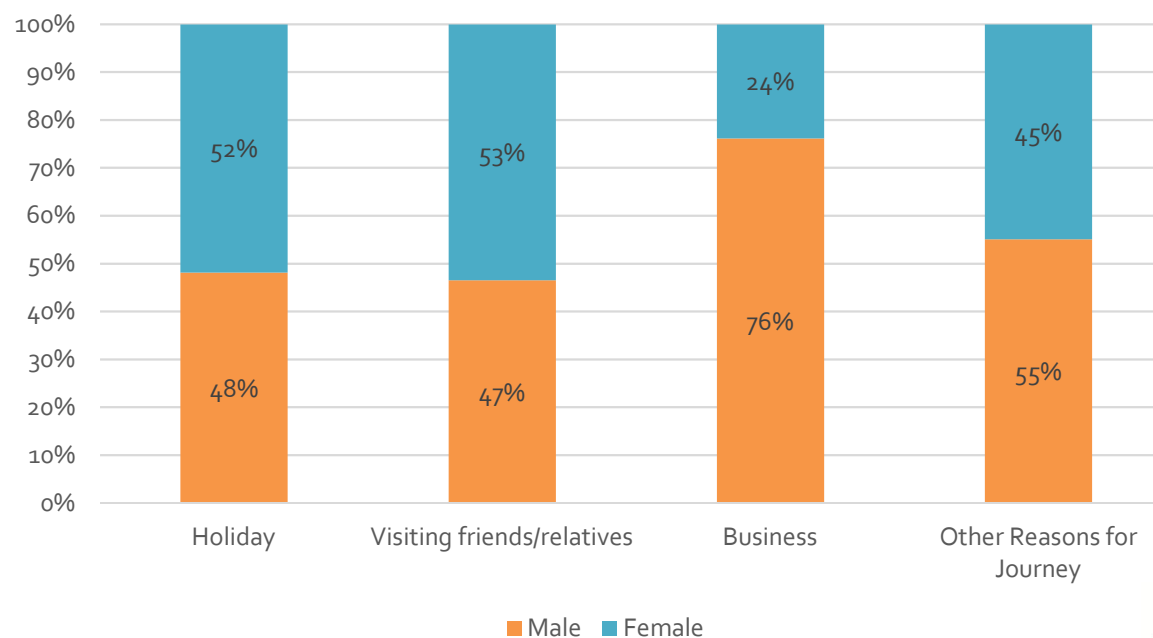
Source: July 2019 Short-term Movement, Residents Returning - Selected Destinations: Original

Australian resident reasons to travel to international destinations by sex – July 2019

This section displays the performance of popular international destinations visited by Australians broken down by sex in July 2019.

In addition, it displays the main reasons for travel to all international destinations split between male and female, for the month of July 2019.

Top destinations for Australian outbound travel	Male	Female
New Zealand	53%	47%
Indonesia	48%	52%
USA	49%	51%
UK	48%	52%
Europe	48%	52%
Thailand	53%	47%
China	50%	50%
Singapore	53%	47%
Japan	50%	50%
Fiji	50%	50%
India	55%	45%
National Total	50%	50%



Source: July 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-two international airlines operated scheduled services to/from Australia during June 2019 (includes five dedicated freight airlines but excludes airlines operating only via code share arrangements).

International scheduled passenger traffic in June 2019 was 3.329 million compared to 3.277 million in June 2018 – an increase of 1.6 per cent.



Source: International Airline Activity—Monthly Publications, June 2019

Airline activity - Month End June 2019

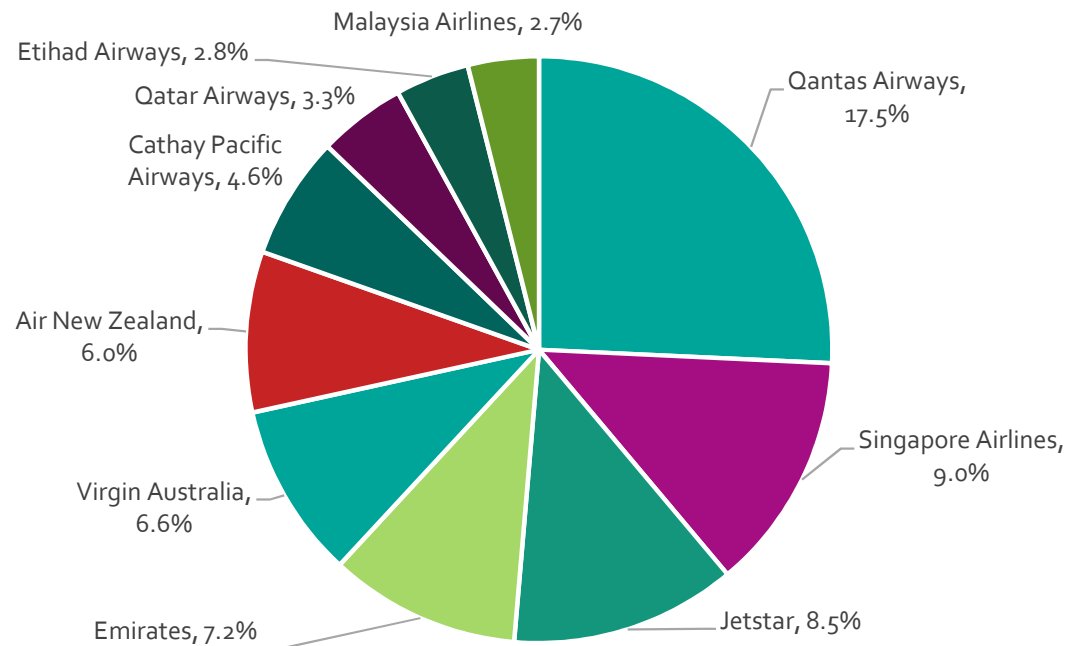
This snapshot displays the market share of the top ten airlines for international travel for the month of June 2019.

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 (0.3%) accounted for 26.3% of total passenger carriage in June 2019 (the group's share in June 2018 was also 26.3%).**
- **The share of passenger traffic accounted for by Australian designated airlines has increased from 31.8% in June 2018 to 32.6% in June 2019.**

Monthly Share of passengers carried	June -18	June -19
Qantas Airways	17.3%	17.5%
Singapore Airlines	8.3%	9.0%
Jetstar	8.7%	8.5%
Emirates	8.0%	7.2%
Virgin Australia	5.8%	6.6%
Air New Zealand	6.0%	6.0%
Cathay Pacific Airways	4.2%	4.6%
Qatar Airways	3.0%	3.3%
Etihad Airways	3.2%	2.8%
Malaysia Airlines	2.4%	2.7%



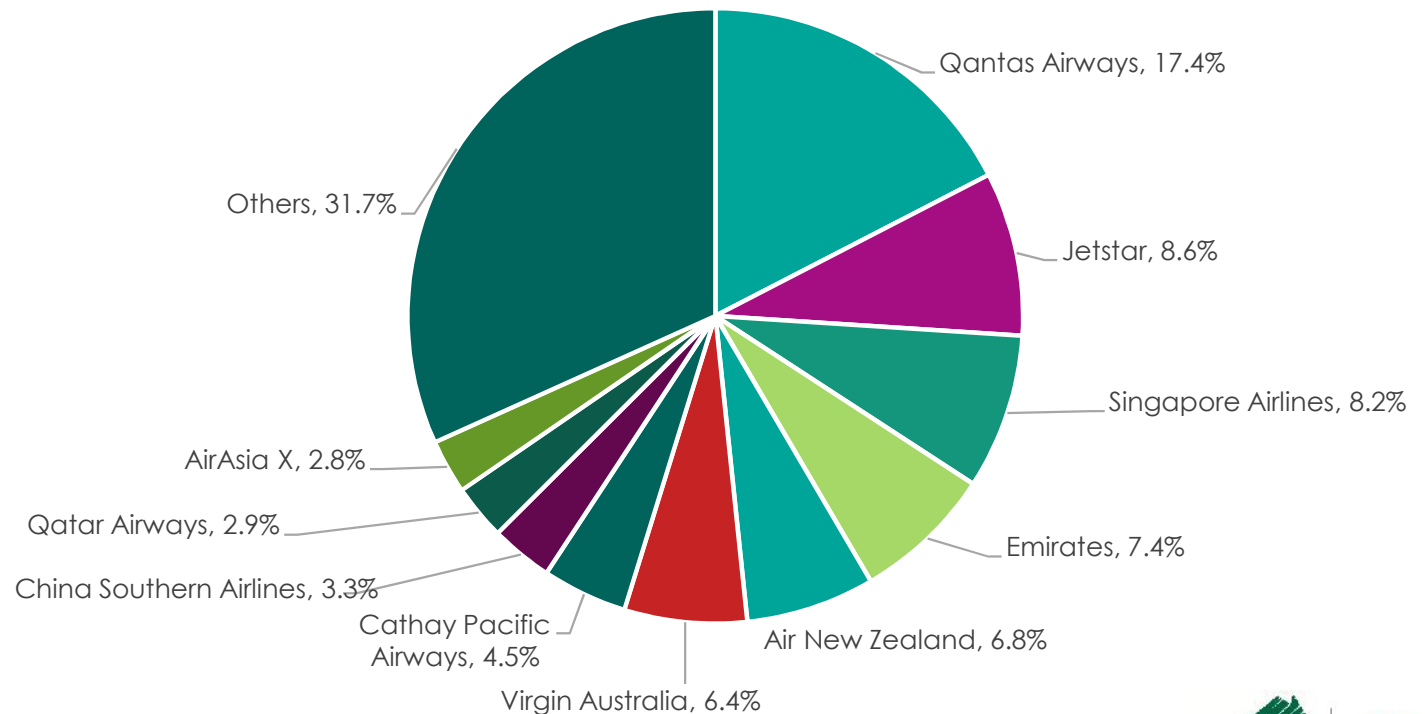
Source: International Airline Activity—Monthly Publications, June 2018 and June 2019

Airline activity – Year End June 2019

This snapshot displays the market share of each airline for international travel of Year end – June 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	June - 18	Year End share of passengers carried	June - 19
Qantas Airways	16.7%	Qantas Airways	17.4%
Jetstar	9.1%	Jetstar	8.6%
Singapore Airlines	8.0%	Singapore Airlines	8.2%
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	4.5%	Cathay Pacific Airways	4.5%
China Southern Airlines	3.1%	China Southern Airlines	3.3%
Qatar Airways	3.0%	Qatar Airways	2.9%
AirAsia X	3.6%	AirAsia X	2.8%
Others	31.2%	Others	31.7%



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

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