

AFTA Travel Trends

December 2019



Inbound and Outbound overview

Introduction

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

	October YE 2018 Total number of international visitors to Australia <i>Inbound</i>	October YE 2019 Total number of international visitors to Australia <i>Inbound</i>	October YE 2018 Total number of international trips by Australians <i>Outbound</i>	October YE 2019 Total number of international trips by Australians <i>Outbound</i>
China	1,434,300	1,462,400	589,100	605,800
New Zealand	1,380,300	1,414,900	1,424,700	1,464,300
USA	785,900	822,200	1,084,500	1,065,500
UK	741,100	714,400	656,200	664,000
Singapore	441,600	480,500	421,800	400,600
Japan	460,400	496,200	458,200	507,100
Malaysia	400,300	386,200	266,200	271,900
South Korea	295,600	276,200	73,800	80,700
India	349,700	390,700	392,300	423,600
Hong Kong	305,200	316,600	244,100	231,600
Indonesia	200,000	216,000	1,236,400	1,368,100
Thailand	98,900	101,900	578,200	551,900
Fiji	45,200	46,000	341,300	340,400
National Total	9,191,900	9,451,200	10,947,700	11,266,000

Source: October 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%.



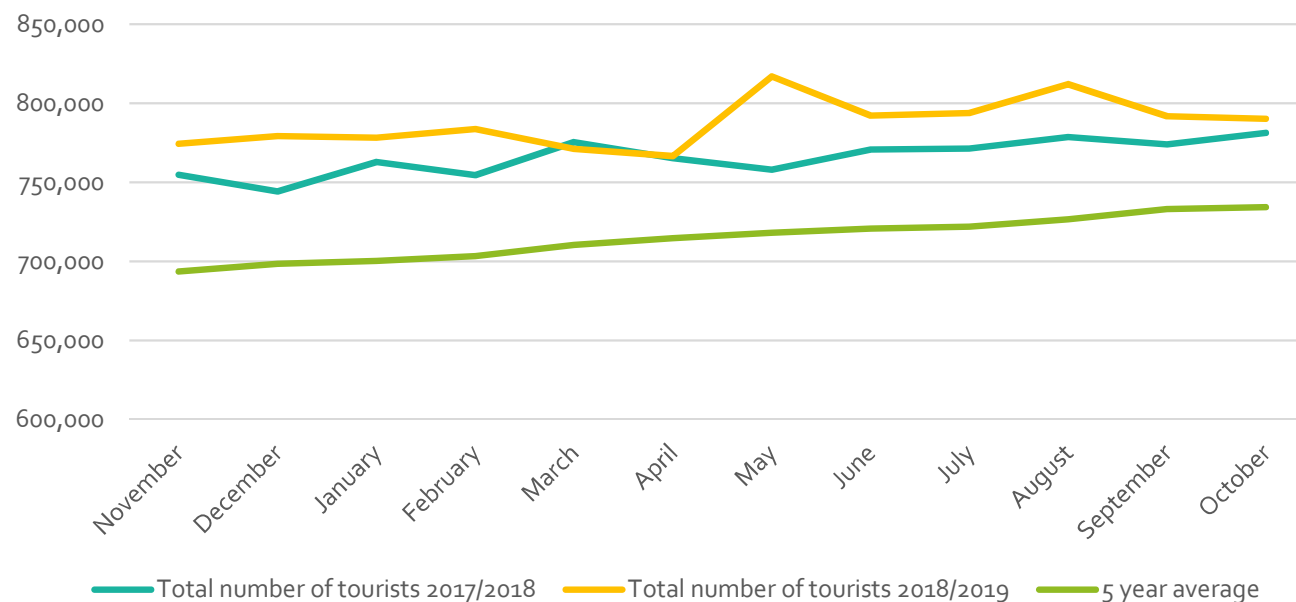
Total inbound tourists to Australia – October 2019

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

Key Highlights

- In 2018-19, there were **9.4 million short-term visitor arrivals to Australia**, the highest year on record.
- The record annual 9.4 million visitors in 2018-19 was **3.8 million more than 10 years earlier** and **272,300 more than 1 year ago**.

Month	Total number of travellers 2017/18	Change on previous year	Total number of travellers 2018/19	Change on previous year	2018/19 Performance
November	754,800	7.3%	774,400	2.6%	Positive
December	744,300	4.6%	779,400	4.7%	Positive
January	762,900	6.9%	778,400	2.0%	Neutral
February	754,600	4.3%	783,800	3.9%	Positive
March	775,400	9.0%	771,200	-0.5%	Neutral
April	765,400	1.4%	766,600	0.2%	Neutral
May	758,100	3.9%	817,000	7.8%	Positive
June	770,800	5.9%	792,200	2.8%	Positive
July	771,400	3.9%	794,000	2.9%	Positive
August	778,800	5.0%	812,200	4.3%	Positive
September	774,100	3.9%	791,800	2.3%	Positive
October	781,300	2.7%	790,200	1.1%	Neutral
National Total	9,191,900	4.9%	9,451,200	2.8%	Positive



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

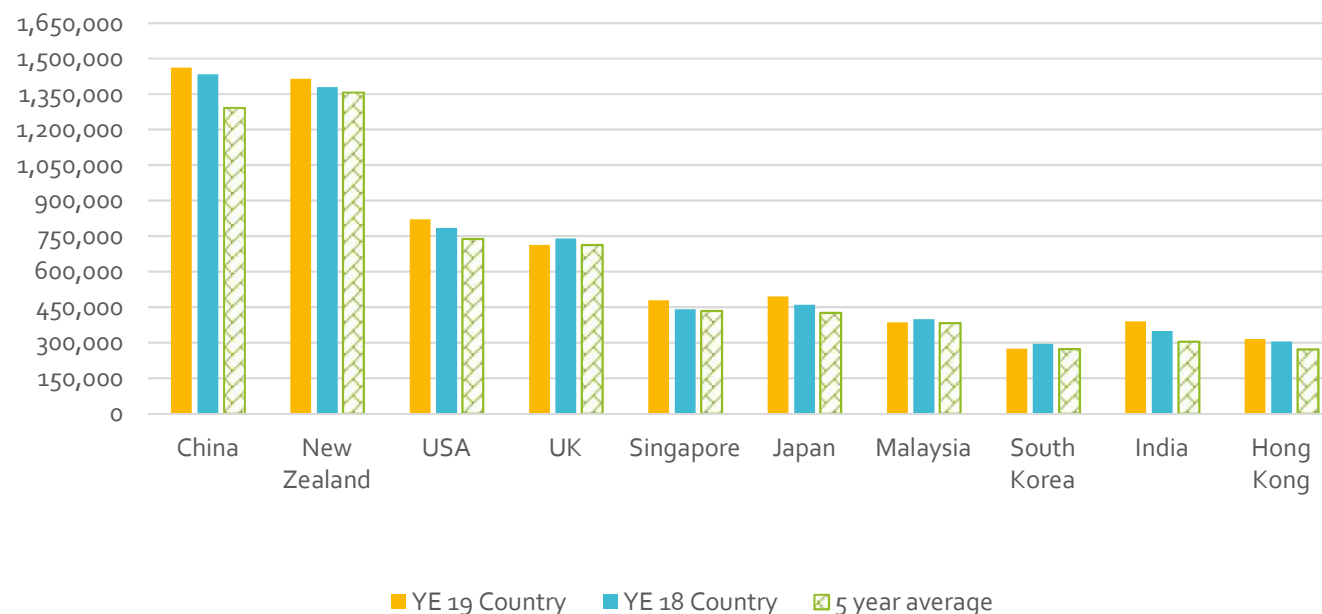
Year end changes to top Australian source markets – October 2019

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

Key Highlights

- Residents from nearly every country around the world visited Australia in 2018-19. China (1.43 million) remained the largest source country of short-term visitor arrivals with New Zealand (1.38 million) in second place. This reflects strong growth in the number of Chinese visitors over the decade, with a 303% increase since 2008-09. however, this growth has slowed more recently.

Destination	Total number of travellers 2018	2018 Year end change	Total number of travellers 2019	2019 Year end change	2019 Performance
China	1,434,300	5.3%	1,462,400	2.0%	Neutral
New Zealand	1,380,300	1.8%	1,414,900	2.5%	Positive
USA	785,900	1.2%	822,200	4.6%	Positive
UK	741,100	3.2%	714,400	-3.6%	Negative
Singapore	441,600	0.1%	480,500	8.8%	Positive
Japan	460,400	6.5%	496,200	7.8%	Positive
Malaysia	400,300	-0.7%	386,200	-3.5%	Negative
South Korea	295,600	-1.7%	276,200	-6.6%	Negative
India	349,700	18.4%	390,700	11.7%	Positive
Hong Kong	305,200	9.7%	316,600	3.7%	Positive
National Total	9,191,900	4.9%	9,451,200	2.8%	Positive



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

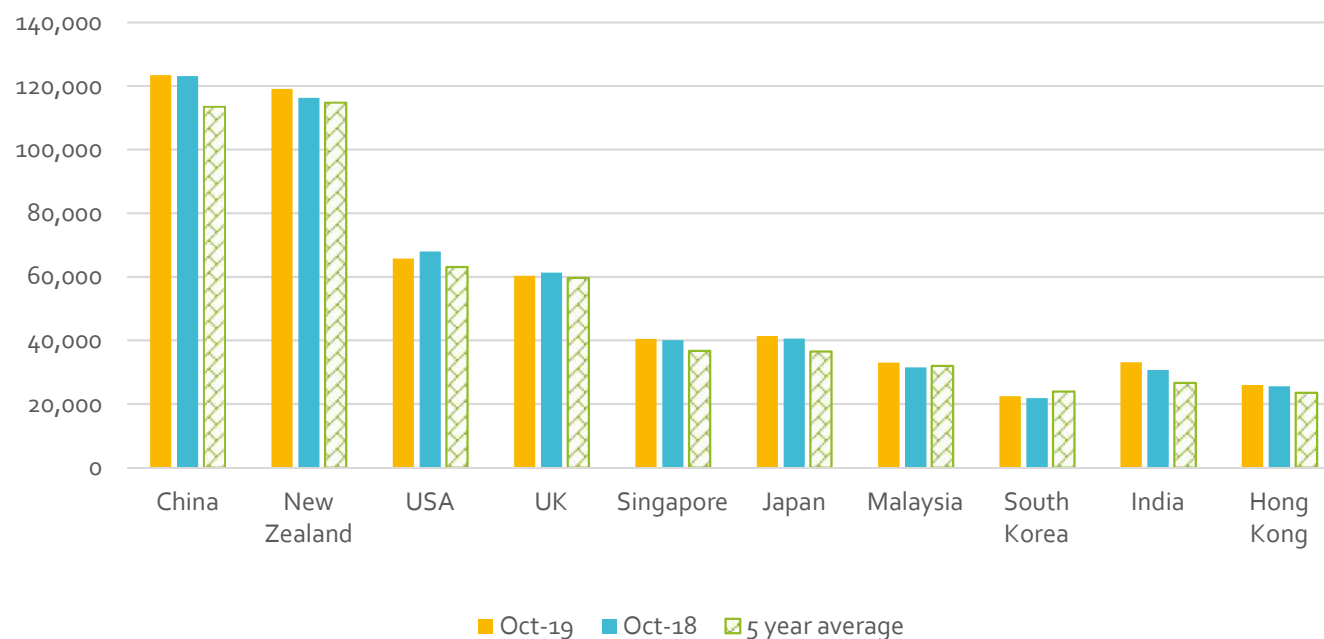
Monthly changes to top Australian source markets – October 2019

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

Key Highlights

- Among the top ten source countries, the highest annual increases were recorded for India, Singapore and China.
- The highest annual decreases were recorded for South Korea and the UK.

Destination	Total number of travellers 2018	Change on previous year	Total number of travellers 2019	Change on previous year	2019 Performance
China	123,100	1.5%	123,400	0.2%	Neutral
New Zealand	116,300	-2.0%	119,100	2.4%	Positive
USA	68,000	4.5%	65,800	-3.2%	Negative
UK	61,400	5.1%	60,400	-1.6%	Neutral
Singapore	40,100	6.9%	40,600	1.2%	Neutral
Japan	40,700	14.3%	41,500	2.0%	Neutral
Malaysia	31,600	-6.5%	33,100	4.7%	Positive
South Korea	21,900	-30.3%	22,500	2.7%	Positive
India	30,800	13.2%	33,200	7.8%	Positive
Hong Kong	25,700	1.2%	26,100	1.6%	Neutral
National Total	781,300	2.7%	790,200	1.1%	Neutral



Source: October 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 – October 2019

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

Key Highlights

- In 2018-19, there were 11.2 million short-term resident returns to Australia from overseas, the highest year on record.
- The record annual 11.2 million resident trips in 2018-19 was 5.4 million more than 10 years earlier and 472,000 more than 1 year ago.

Month	Total number of travellers 2017/2018	Change on previous year	Total number of travellers 2018/2019	Change on previous year	2019 Performance
November	888,000	5.6%	932,800	5.0%	Positive
December	875,400	0.4%	942,500	7.7%	Positive
January	895,500	4.8%	939,800	4.9%	Positive
February	879,200	-2.0%	911,800	3.7%	Positive
March	915,900	7.3%	924,600	0.9%	Neutral
April	926,200	3.8%	923,100	-0.3%	Neutral
May	924,900	5.0%	972,000	5.1%	Positive
June	913,900	4.9%	949,200	3.9%	Positive
July	931,300	6.5%	932,500	0.1%	Neutral
August	932,500	6.5%	946,300	1.5%	Neutral
September	919,200	2.4%	947,500	3.1%	Positive
October	945,700	6.3%	943,900	-0.2%	Neutral
Total	10,947,700	4.2%	11,266,000	2.9%	Positive



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

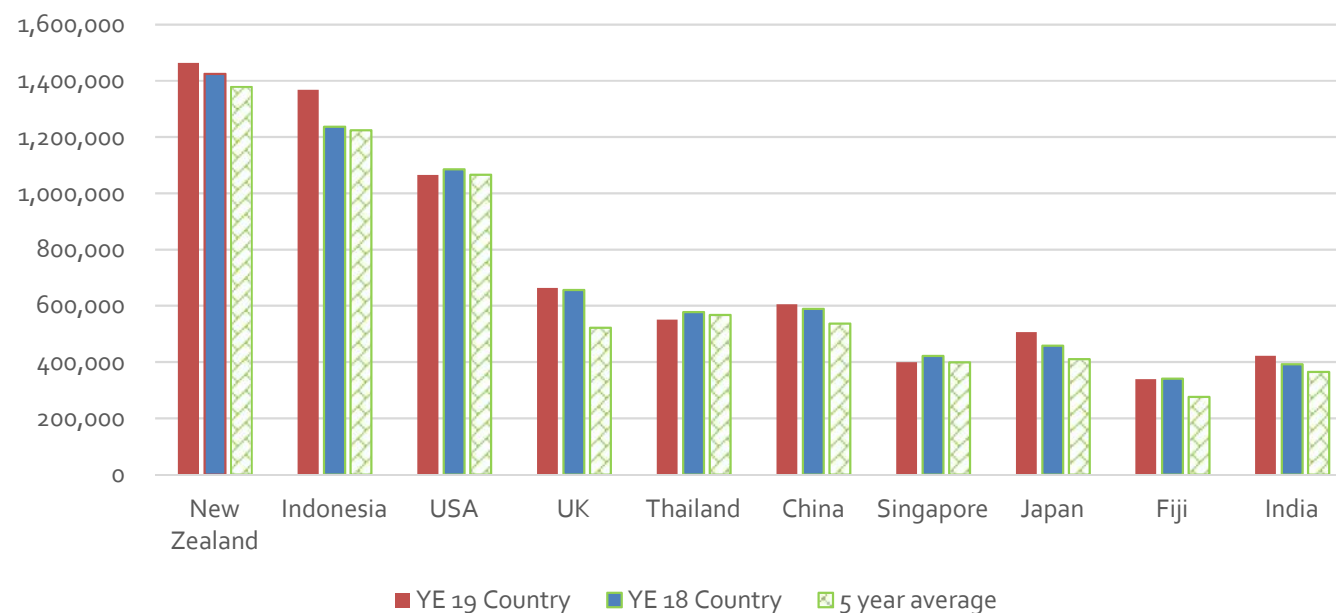
Year end changes to popular international destinations travelled to by Australians – October 2019

This section displays the performance of the major destinations Australians are travelling to as of October 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 7% 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	1,424,700	-0.3%	1,464,300	2.8%	Positive
Indonesia	1,236,400	2.5%	1,368,100	10.7%	Positive
USA	1,084,500	-0.3%	1,065,500	-1.8%	Neutral
UK	656,200	4.5%	664,000	1.2%	Neutral
Thailand	578,200	1.3%	551,900	-4.5%	Negative
China	589,100	10.6%	605,800	2.8%	Positive
Singapore	421,800	4.6%	400,600	-5.0%	Negative
Japan	458,200	16.9%	507,100	10.7%	Positive
Fiji	341,300	-1.9%	340,400	-0.3%	Neutral
India	392,300	8.8%	423,600	8.0%	Positive
National Total	10,947,700	4.2%	11,266,000	2.9%	Positive



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

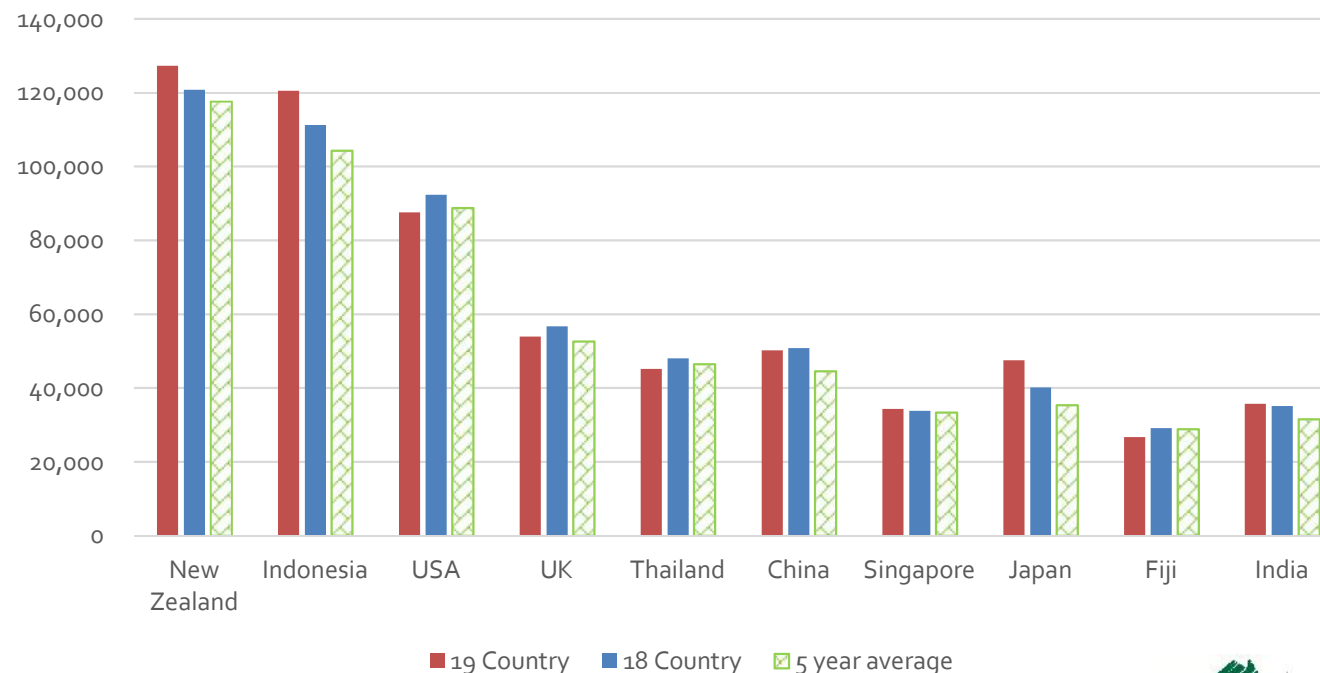
Monthly changes to popular international destinations travelled to by Australians – October 2019

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

Key Highlights

- The national total is tracking 7.0% above the five-year average.
- China experiences 2.8% increase for year end change, but down 1.2% in October 2019.

Destination	Total number of travellers 2018	Change to previous year	Total number of travellers 2019	Change to previous year	2019 Performance
New Zealand	120,800	2.7%	127,300	5.4%	Positive
Indonesia	111,300	17.2%	120,600	8.4%	Positive
USA	92,400	7.6%	87,600	-5.2%	Negative
UK	56,800	8.4%	54,000	-4.9%	Negative
Thailand	48,100	-0.6%	45,200	-6.0%	Negative
China	50,900	8.5%	50,300	-1.2%	Neutral
Singapore	33,900	-4.2%	34,400	1.5%	Neutral
Japan	40,200	20.0%	47,600	18.4%	Positive
Fiji	29,200	2.1%	26,800	-8.2%	Negative
India	35,200	-4.6%	35,800	1.7%	Neutral
National Total	945,700	6.3%	943,900	-0.2%	Neutral

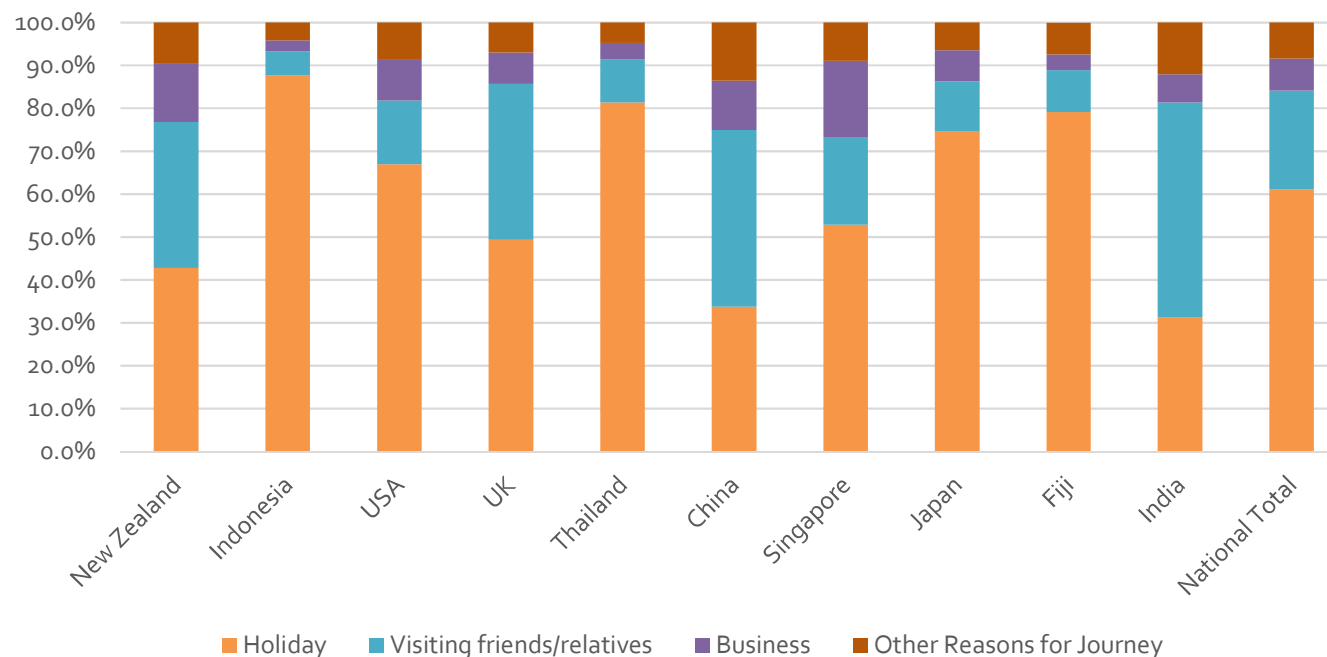


Source: October 2019 Short-term Movement, Residents Returning - Selected Destinations: Seasonally adjusted

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

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

	Holiday	Visiting friends/relatives	Business	Other Reasons for Journey
New Zealand	42.9%	34.0%	13.7%	9.4%
Indonesia	87.6%	5.7%	2.5%	4.2%
USA	67.0%	14.8%	9.5%	8.7%
UK	49.4%	36.3%	7.3%	7.0%
Thailand	81.4%	10.0%	3.9%	4.8%
China	33.8%	41.1%	11.5%	13.5%
Singapore	52.9%	20.5%	17.7%	9.0%
Japan	74.6%	11.7%	7.2%	6.5%
Fiji	79.2%	9.7%	3.7%	7.4%
India	31.2%	50.1%	6.6%	12.1%
National Total	61.1%	23.0%	7.5%	8.4%



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

International scheduled passenger traffic in September 2019 was 3.497 million compared to 3.463 million in September 2018 – an increase of 1.0 per cent.



Source: International Airline Activity—Monthly Publications, September 2019

Airline activity - Month End September 2019

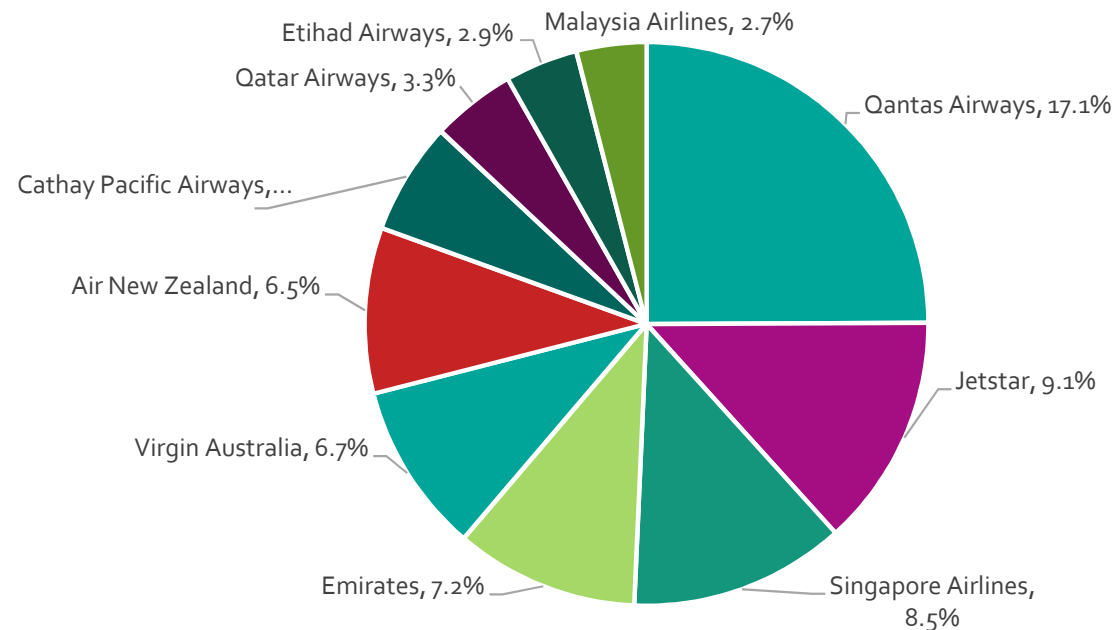
This snapshot displays the market share of the top ten airlines for international travel for the month of September 2019.

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 26.4% of total passenger carriage in September 2019 (the group's share in September 2018 was also 26.0%).**
- **The share of passenger traffic accounted for by Australian designated airlines has increased from 32.5% in September 2018 to 32.9% in September 2019.**

Monthly Share of passengers carried	September -18	September -19
Qantas Airways	17.2%	17.1%
Jetstar	8.6%	9.1%
Singapore Airlines	8.4%	8.5%
Emirates	8.5%	7.2%
Virgin Australia	6.6%	6.7%
Air New Zealand	6.2%	6.5%
Cathay Pacific Airways	4.1%	4.4%
Qatar Airways	3.1%	3.3%
Etihad Airways	3.2%	2.9%
Malaysia Airlines	2.6%	2.7%



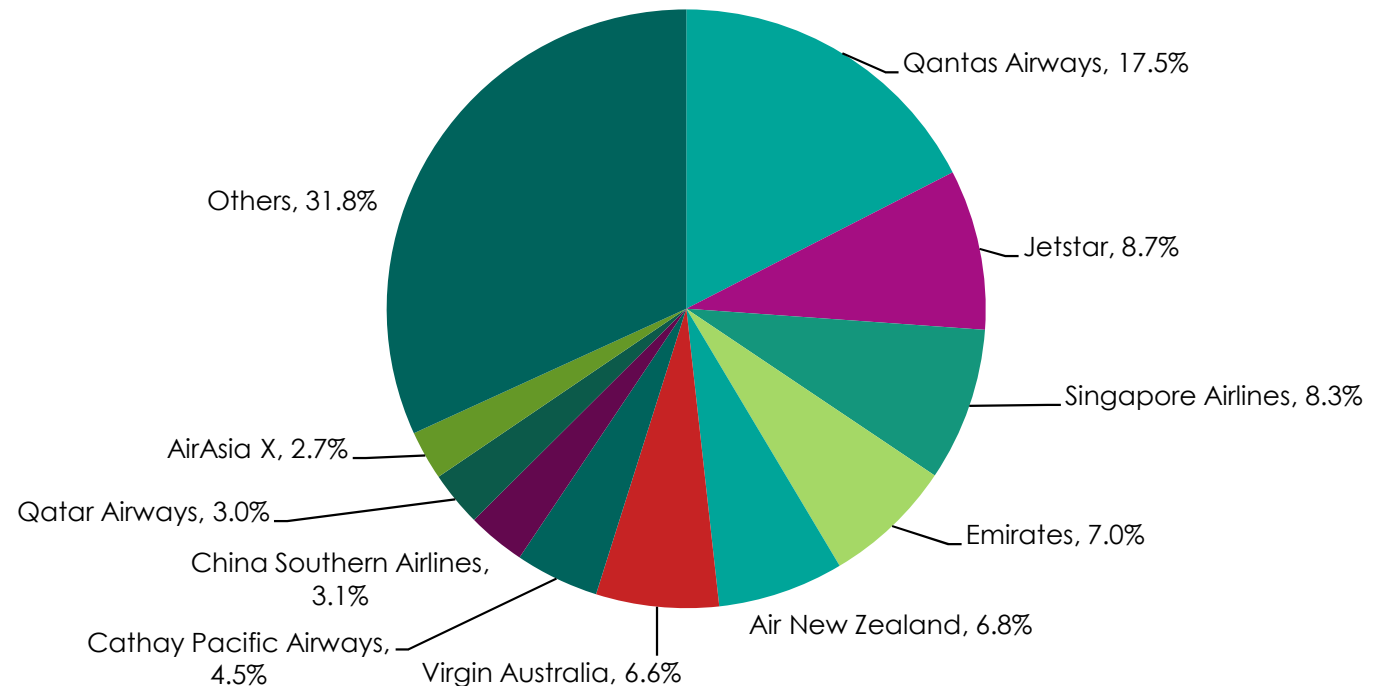
Source: International Airline Activity—Monthly Publications, September 2018 and September 2019

Airline activity – Year End September 2019

This snapshot displays the market share of each airline for international travel of Year end – September 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	September - 18	Year End share of passengers carried	September - 19
Qantas Airways	16.9%	Qantas Airways	17.5%
Jetstar	8.9%	Jetstar	8.7%
Singapore Airlines	8.0%	Singapore Airlines	8.3%
Emirates	7.9%	Emirates	7.0%
Air New Zealand	6.6%	Air New Zealand	6.8%
Virgin Australia	6.1%	Virgin Australia	6.6%
Cathay Pacific Airways	4.4%	Cathay Pacific Airways	4.5%
China Southern Airlines	3.1%	China Southern Airlines	3.1%
Etihad Airways	3.0%	Qatar Airways	3.0%
AirAsia X	3.3%	AirAsia X	2.7%
Others	31.7%	Others	31.8%



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

For further information please contact:

Courtney Duddleston

Head of Strategy & Finance

E: courtney.duddleston@afta.com.au

Ph: 02 9287 9900

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