

AFTA Travel Trends

January 2020



Inbound and Outbound overview

Introduction

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

	November YE 2018 Total number of international visitors to Australia <i>Inbound</i>	November YE 2019 Total number of international visitors to Australia <i>Inbound</i>	November YE 2018 Total number of international trips by Australians <i>Outbound</i>	November YE 2019 Total number of international trips by Australians <i>Outbound</i>
China	1,436,300	1,458,100	590,800	609,400
New Zealand	1,380,500	1,419,600	1,429,300	1,463,500
USA	784,600	822,100	1,087,500	1,059,000
UK	736,000	715,500	658,400	665,700
Singapore	444,300	481,600	412,800	410,300
Japan	463,100	497,500	461,800	520,100
Malaysia	403,000	383,900	263,200	274,100
South Korea	292,400	277,300	74,600	82,800
India	354,300	395,200	397,100	428,300
Hong Kong	307,000	315,800	245,100	224,400
Indonesia	199,700	217,700	1,253,800	1,382,000
Thailand	99,300	102,500	575,300	547,700
Fiji	45,200	46,000	343,400	340,800
National Total	9,211,700	9,466,800	10,992,200	11,310,800

Source: November 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%.



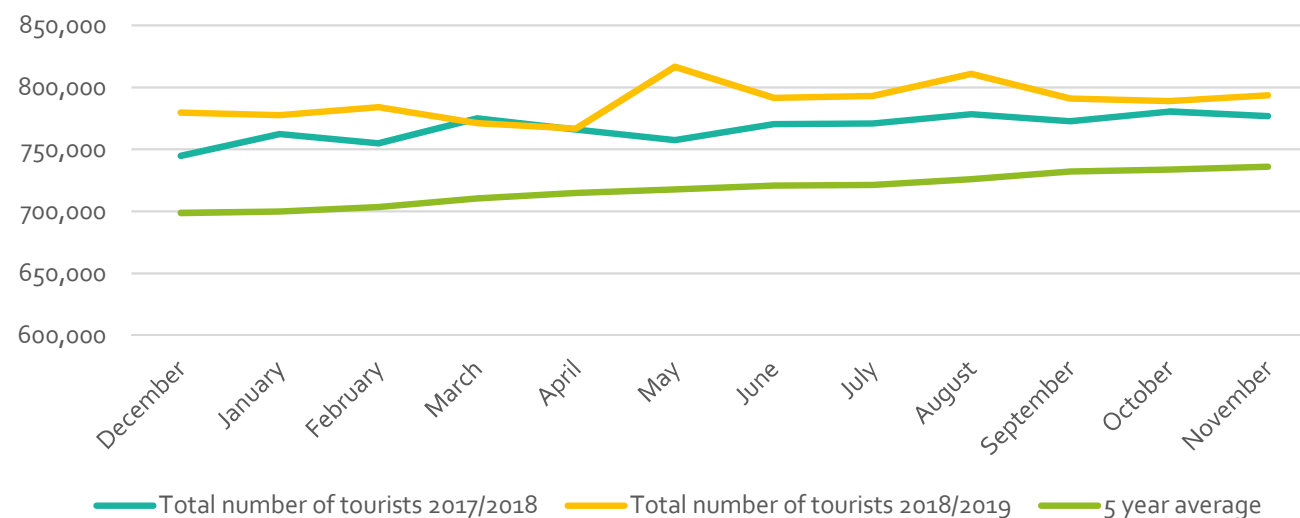
Total inbound tourists to Australia – November 2019

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

Key Highlights

- During November 2019, short-term visitor arrivals (793,800 movements) increased 1.0% when compared with October 2019 (789,100 movements).

Month	Total number of travellers 2017/18	Change on previous year	Total number of travellers 2018/19	Change on previous year	2018/19 Performance
December	744,900	4.7%	779,800	4.7%	Positive
January	762,400	6.8%	777,700	2.0%	Neutral
February	755,000	4.3%	784,200	3.9%	Positive
March	775,200	8.9%	771,400	-0.5%	Neutral
April	766,100	1.5%	766,900	0.1%	Neutral
May	757,700	3.9%	816,700	7.8%	Positive
June	770,500	5.7%	791,700	2.8%	Positive
July	771,100	4.0%	793,200	2.9%	Positive
August	778,600	5.1%	811,100	4.2%	Positive
September	772,700	3.9%	791,200	2.4%	Positive
October	780,600	2.6%	789,100	1.1%	Neutral
November	776,900	2.8%	793,800	2.2%	Positive
National Total	9,211,700	4.5%	9,466,800	2.8%	Positive



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

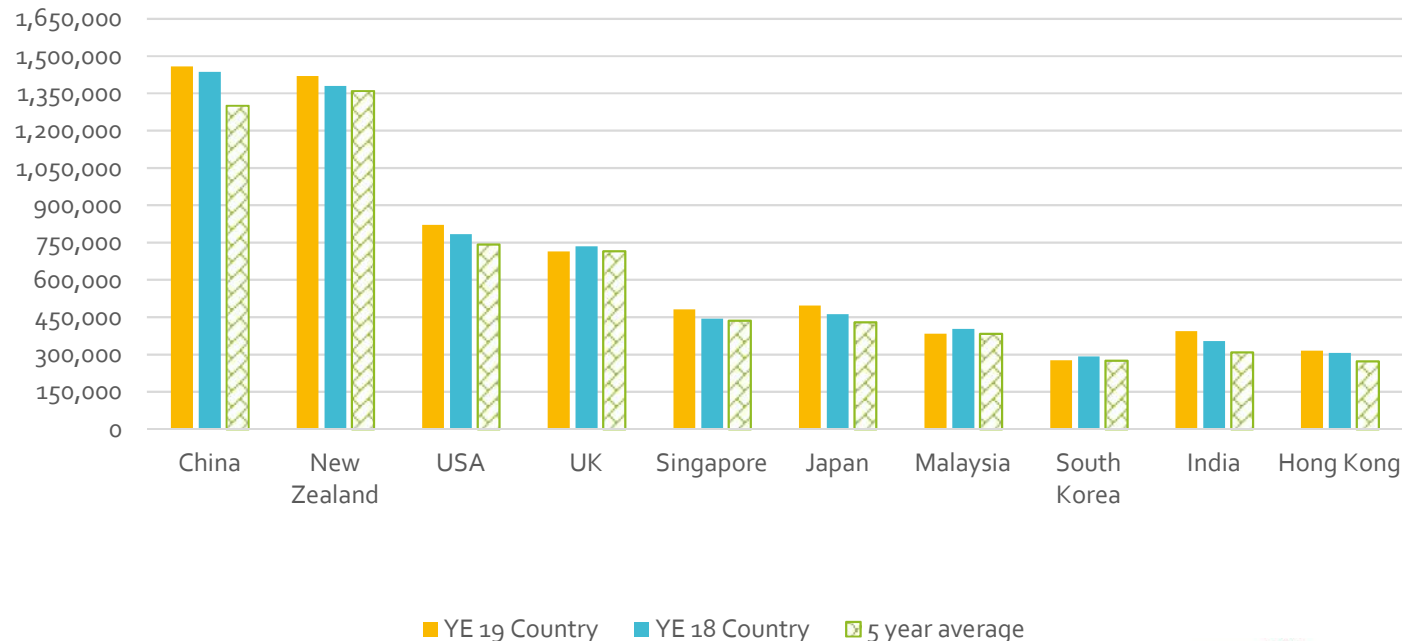
Year end changes to top Australian source markets – November 2019

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

Key Highlights

- China was reported as the largest source country, accounting for 15% of all visitor arrivals.

Destination	Total number of travellers 2018	2018 Year end change	Total number of travellers 2019	2019 Year end change	2019 Performance
China	1,436,300	4.9%	1,458,100	1.5%	Neutral
New Zealand	1,380,500	1.5%	1,419,600	2.8%	Positive
USA	784,600	0.2%	822,100	4.8%	Positive
UK	736,000	1.5%	715,500	-2.8%	Negative
Singapore	444,300	0.3%	481,600	8.4%	Positive
Japan	463,100	6.8%	497,500	7.4%	Positive
Malaysia	403,000	0.2%	383,900	-4.7%	Negative
South Korea	292,400	-3.0%	277,300	-5.2%	Negative
India	354,300	18.6%	395,200	11.5%	Positive
Hong Kong	307,000	8.8%	315,800	2.9%	Positive
National Total	9,211,700	4.5%	9,466,800	2.8%	Positive



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

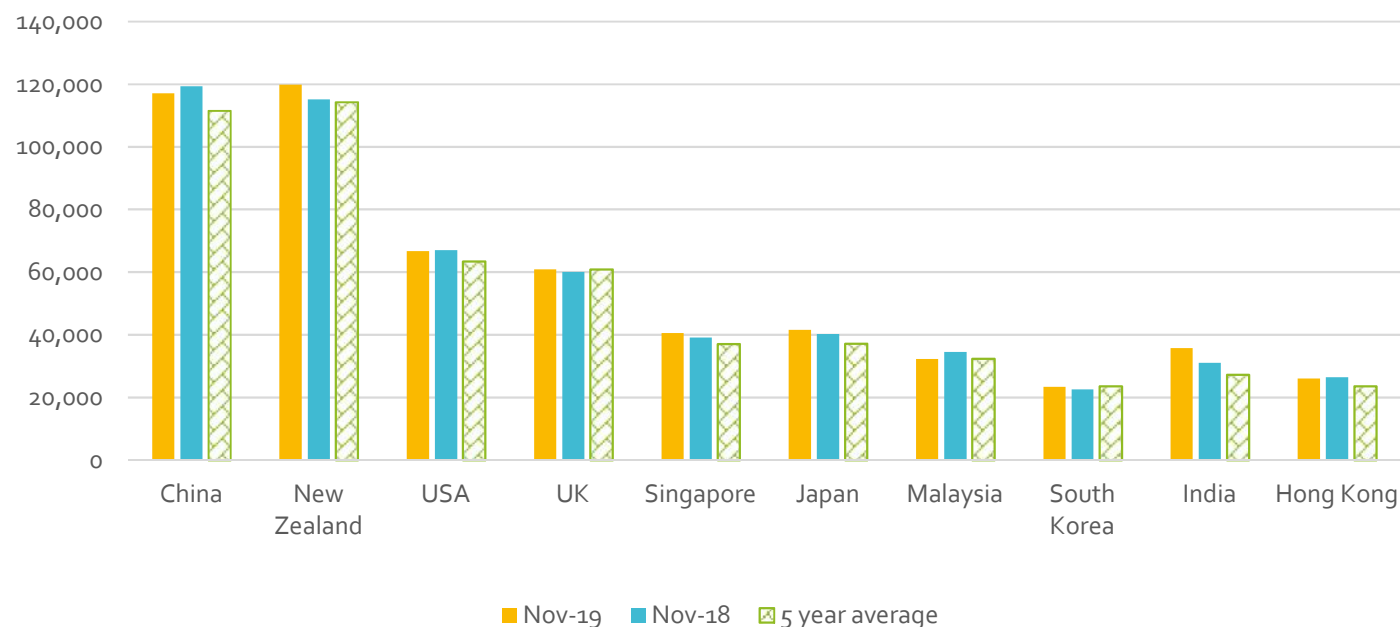
Monthly changes to top Australian source markets – November 2019

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

Key Highlights

- Among the top ten source countries, the highest annual increases were recorded for India, New Zealand and South Korea.
- On a month to month comparison, Malaysia has the largest decrease of 6.6% or 2,300 passengers.
- The largest increase has been India with 15.1% or 4,700 passengers.

Destination	Total number of travellers 2018	Change on previous year	Total number of travellers 2019	Change on previous year	2019 Performance
China	119,400	2.6%	117,100	-1.9%	Neutral
New Zealand	115,200	0.2%	119,900	4.1%	Positive
USA	67,100	-1.5%	66,800	-0.4%	Neutral
UK	60,100	-8.1%	60,900	1.3%	Neutral
Singapore	39,200	8.3%	40,600	3.6%	Positive
Japan	40,300	8.3%	41,600	3.2%	Positive
Malaysia	34,600	8.5%	32,300	-6.6%	Negative
South Korea	22,600	-12.4%	23,500	4.0%	Positive
India	31,100	16.5%	35,800	15.1%	Positive
Hong Kong	26,500	6.9%	26,100	-1.5%	Neutral
National Total	776,900	2.8%	793,800	2.2%	Positive



Source: November 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%.



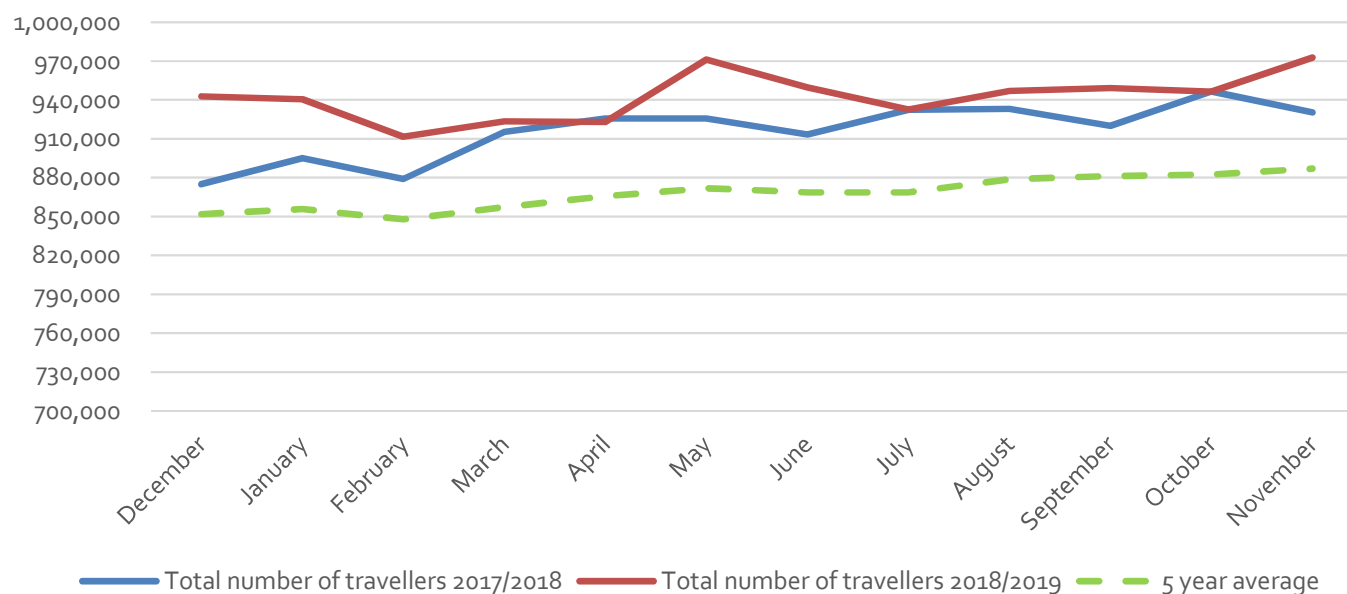
Total outbound Australian travellers – November 2019

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

Key Highlights

- During November 2019, short-term resident returns (972,700 movements) increased 2.7% when compared with October 2019 (946,500 movements).

Month	Total number of travellers 2017/2018	Change on previous year	Total number of travellers 2018/2019	Change on previous year	2019 Performance
December	875,000	0.4%	942,800	7.7%	Positive
January	895,100	4.7%	940,600	5.1%	Positive
February	879,100	-2.0%	911,700	3.7%	Positive
March	915,400	7.3%	923,500	0.9%	Neutral
April	925,700	3.8%	923,100	-0.3%	Neutral
May	925,800	5.1%	971,200	4.9%	Positive
June	913,300	4.7%	949,600	4.0%	Positive
July	932,400	6.6%	932,700	0.0%	Neutral
August	933,200	6.3%	947,100	1.5%	Neutral
September	920,100	2.5%	949,300	3.2%	Positive
October	946,600	6.3%	946,500	0.0%	Neutral
November	930,500	5.0%	972,700	4.5%	Positive
Total	10,992,200	4.2%	11,310,800	2.9%	Positive



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

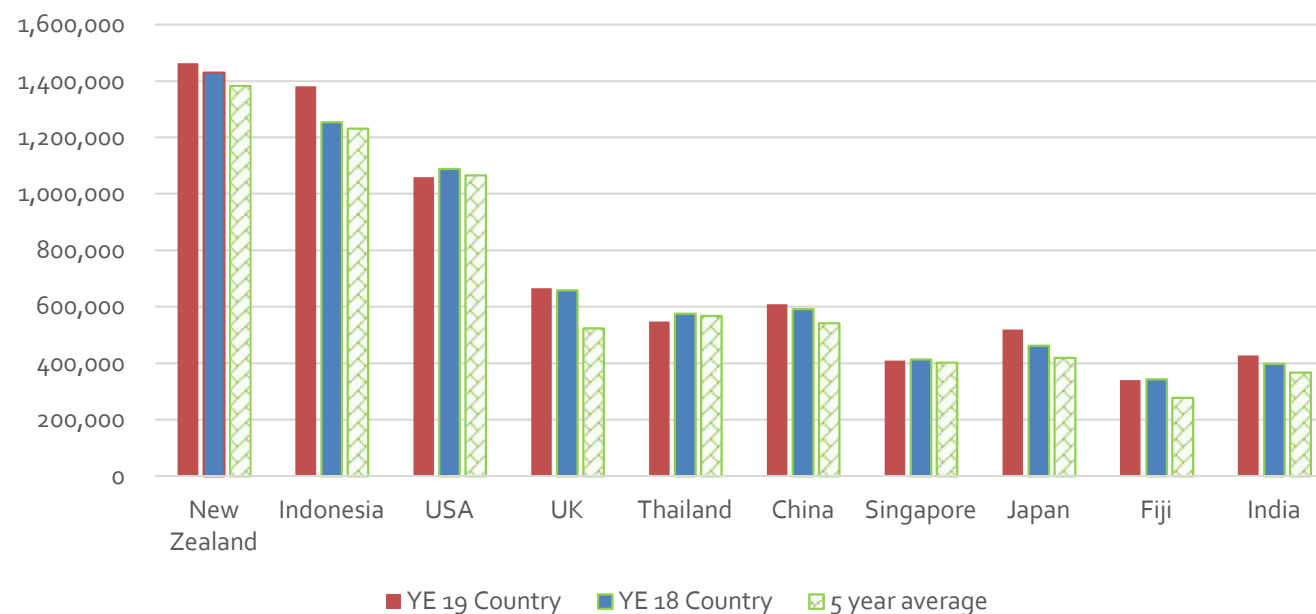
Year end changes to popular international destinations travelled to by Australians – November 2019

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

Key Highlights

- **New Zealand is reported as the most popular destination country, accounting for 13% of all those returning.**
- **National outbound travel tracking 7% above the five-year average.**
- **Japan continues to show high positive growth of 12.6% or 58,300 more passengers comparing the same 12 month period.**

Destination	Total number of travellers 2018	2018 Year end change	Total number of travellers 2019	2019 Year end change	2019 Performance
New Zealand	1,429,300	-0.5%	1,463,500	2.4%	Positive
Indonesia	1,253,800	4.6%	1,382,000	10.2%	Positive
USA	1,087,500	0.8%	1,059,000	-2.6%	Negative
UK	658,400	4.7%	665,700	1.1%	Neutral
Thailand	575,300	-0.1%	547,700	-4.8%	Negative
China	590,800	9.7%	609,400	3.1%	Positive
Singapore	412,800	0.7%	410,300	-0.6%	Neutral
Japan	461,800	16.1%	520,100	12.6%	Positive
Fiji	343,400	-0.8%	340,800	-0.8%	Neutral
India	397,100	10.0%	428,300	7.9%	Positive
National Total	10,992,200	4.2%	11,310,800	2.9%	Positive



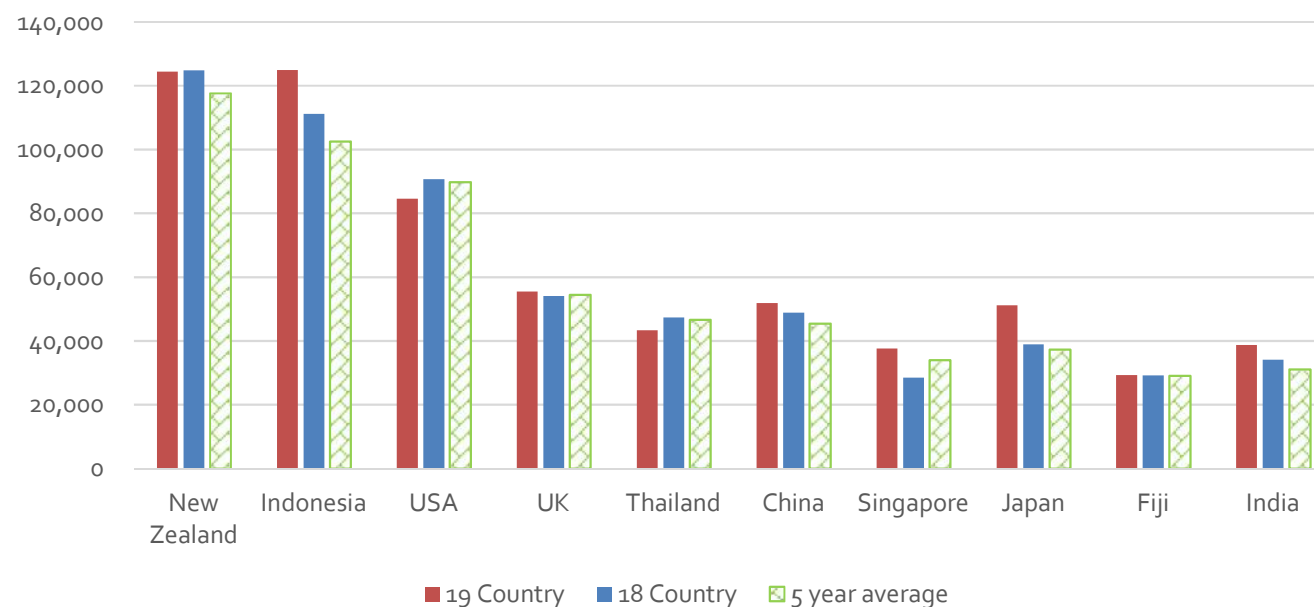
Monthly changes to popular international destinations travelled to by Australians – November 2019

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

Key Highlights

- The national total is tracking 9.7% above the five-year average.
- New Zealand experiences 2.4% increase for year end change in November 2019, but down 0.3% in November 2019.
- USA and Thailand showed negative growth when comparing November 2019 to November 2018.

Destination	Total number of travellers 2018	Change to previous year	Total number of travellers 2019	Change to previous year	2019 Performance
New Zealand	124,900	3.8%	124,500	-0.3%	Neutral
Indonesia	111,200	18.2%	125,000	12.4%	Positive
USA	90,800	3.1%	84,600	-6.8%	Negative
UK	54,200	4.0%	55,600	2.6%	Positive
Thailand	47,400	-6.0%	43,400	-8.4%	Negative
China	48,900	3.4%	51,900	6.1%	Positive
Singapore	28,600	-24.3%	37,700	31.8%	Positive
Japan	39,000	8.9%	51,200	31.3%	Positive
Fiji	29,300	6.5%	29,400	0.3%	Neutral
India	34,200	15.9%	38,800	13.5%	Positive
National Total	930,500	5.0%	972,700	4.5%	Positive

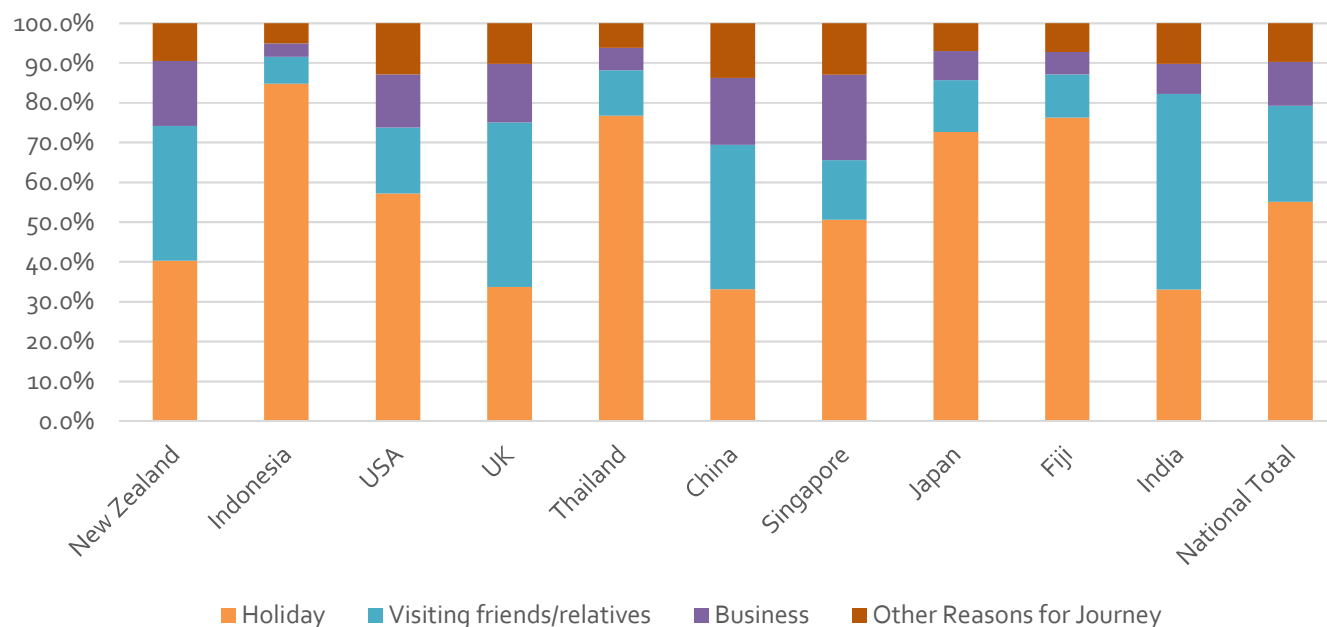


Source: November 2019 Short-term Movement, Residents Returning - Selected Destinations: Seasonally adjusted

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

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

	Holiday	Visiting friends/relatives	Business	Other Reasons for Journey
New Zealand	40.4%	33.8%	16.3%	9.5%
Indonesia	84.8%	6.7%	3.5%	5.0%
USA	57.3%	16.6%	13.3%	12.9%
UK	33.7%	41.4%	14.7%	10.2%
Thailand	76.8%	11.4%	5.6%	6.1%
China	33.2%	36.3%	16.8%	13.7%
Singapore	50.6%	15.0%	21.4%	12.9%
Japan	72.7%	13.0%	7.3%	7.0%
Fiji	76.3%	10.9%	5.6%	7.2%
India	33.1%	49.1%	7.6%	10.2%
National Total	55.2%	24.1%	11.0%	9.8%



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

International scheduled passenger traffic in October 2019 was 3.587 million compared to 3.548 million in October 2018 – an increase of 1.1 per cent.



Source: International Airline Activity—Monthly Publications, October 2019

Airline activity - Month End October 2019

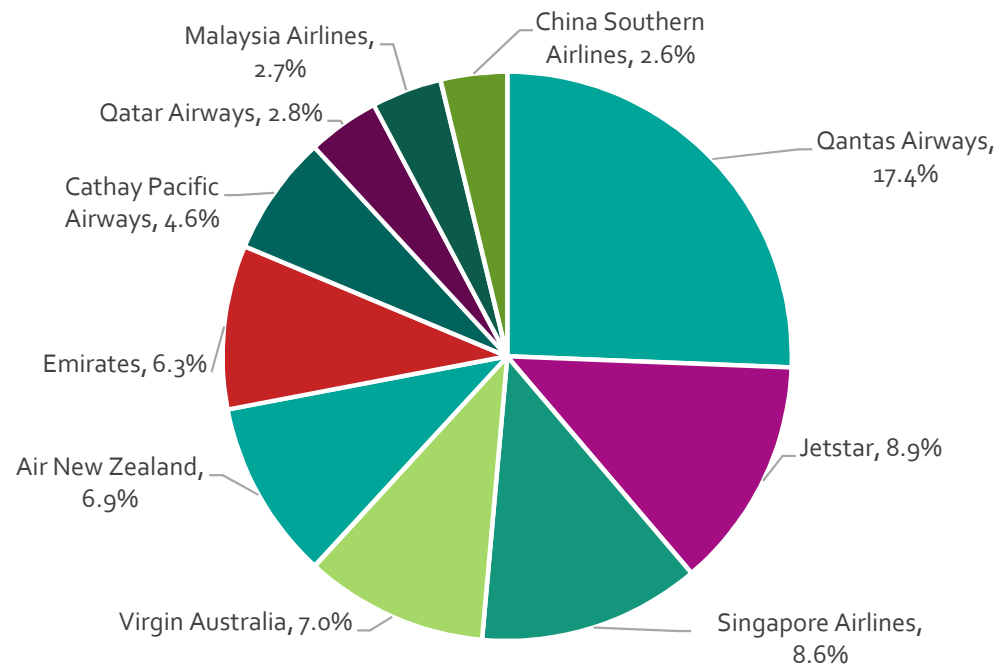
This snapshot displays the market share of the top ten airlines for international travel for the month of October 2019.

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 October 2019 (the group's share in October 2018 was 26.6%).**
- **The share of passenger traffic accounted for by Australian designated airlines has increased from 33.0% in October 2018 to 33.3% in October 2019.**

Monthly Share of passengers carried	October -18	October -19
Qantas Airways	17.7%	17.4%
Jetstar	8.7%	8.9%
Singapore Airlines	8.2%	8.6%
Virgin Australia	6.6%	7.0%
Air New Zealand	6.9%	6.9%
Emirates	7.3%	6.3%
Cathay Pacific Airways	4.6%	4.6%
Qatar Airways	2.6%	2.8%
Malaysia Airlines	2.5%	2.7%
China Southern Airlines	3.1%	2.6%



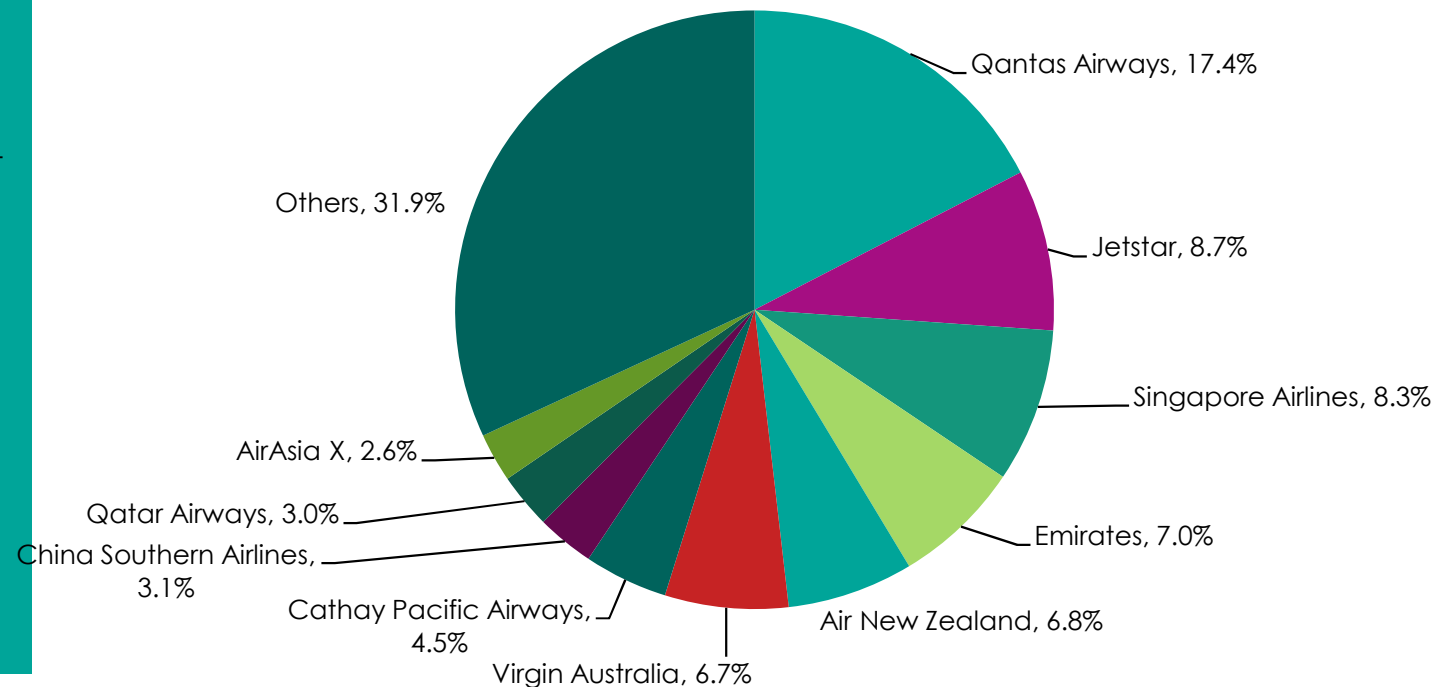
Source: International Airline Activity—Monthly Publications, October 2018 and October 2019

Airline activity – Year End October 2019

This snapshot displays the market share of each airline for international travel of Year end – October 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	October - 18	Year End share of passengers carried	October - 19
Qantas Airways	17.0%	Qantas Airways	17.4%
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	6.7%
Cathay Pacific Airways	4.4%	Cathay Pacific Airways	4.5%
AirAsia X	3.2%	China Southern Airlines	3.1%
China Southern Airlines	3.2%	Qatar Airways	3.0%
Etihad Airways	3.0%	AirAsia X	2.6%
Others	31.8%	Others	31.9%



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

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