

AFTA Travel Trends

February 2020



Inbound and Outbound overview

Introduction

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

	December YE 2018 Total number of international visitors to Australia <i>Inbound</i>	December YE 2019 Total number of international visitors to Australia <i>Inbound</i>	December YE 2018 Total number of international trips by Australians <i>Outbound</i>	December YE 2019 Total number of international trips by Australians <i>Outbound</i>
China	1,440,200	1,453,200	593,600	608,800
New Zealand	1,384,300	1,434,400	1,434,600	1,466,200
USA	788,700	819,700	1,091,600	1,054,100
UK	732,600	716,200	665,600	661,600
Singapore	449,000	479,300	413,900	416,800
Japan	467,900	499,600	465,800	528,500
Malaysia	402,100	383,800	262,600	275,000
South Korea	290,000	279,800	75,800	83,300
India	357,900	400,400	396,000	430,900
Hong Kong	307,900	316,100	247,300	217,500
Indonesia	201,600	218,300	1,280,900	1,396,900
Thailand	99,800	103,300	571,900	543,900
Fiji	45,300	45,900	340,900	343,700
National Total	9,244,100	9,486,100	11,057,200	11,340,400

Source: December 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%.



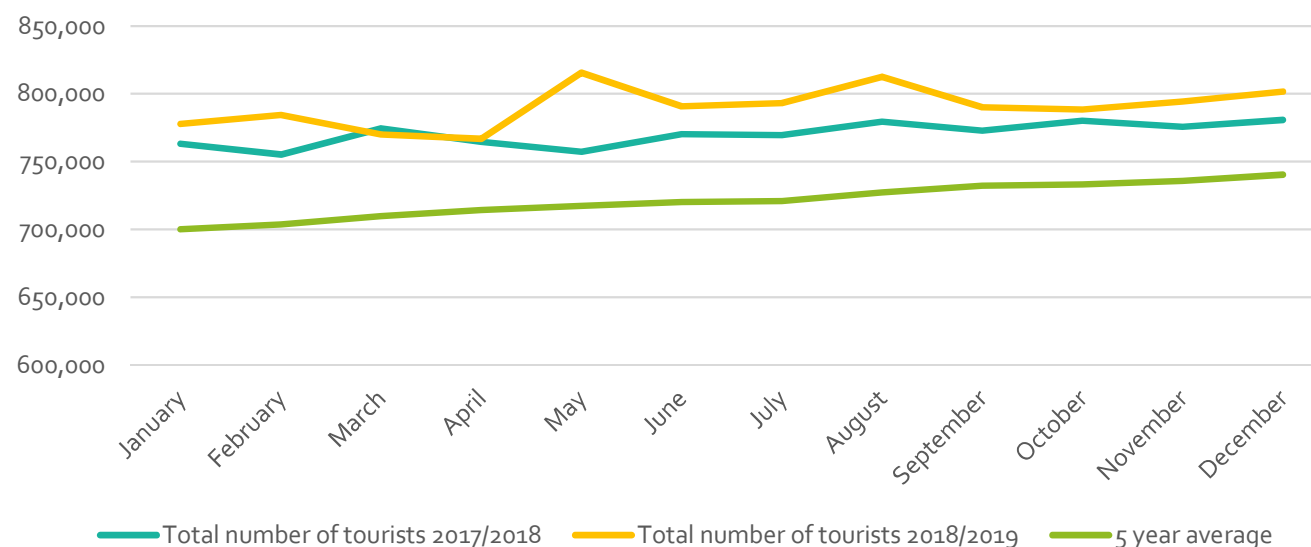
Total inbound tourists to Australia – December 2019

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

Key Highlights

- The record annual 9.486 million visitors in 2019 was 3.9 million more than 10 years earlier and 242,000 more than 1 year ago. There has generally been an ongoing increase of visitor arrivals to Australia over recent decades.

Month	Total number of travellers 2018	Change on previous year	Total number of travellers 2019	Change on previous year	2019 Performance
January	763,200	7.0%	777,900	1.9%	Neutral
February	755,300	4.3%	784,400	3.9%	Positive
March	774,500	8.9%	770,100	-0.6%	Neutral
April	764,700	1.3%	766,900	0.3%	Neutral
May	757,300	3.8%	815,600	7.7%	Positive
June	770,300	5.9%	790,900	2.7%	Positive
July	769,500	3.9%	793,100	3.1%	Positive
August	779,600	5.0%	812,500	4.2%	Positive
September	772,900	3.8%	790,200	2.2%	Positive
October	780,300	2.8%	788,400	1.0%	Neutral
November	775,700	2.6%	794,300	2.4%	Positive
December	780,800	4.8%	801,800	2.7%	Positive
National Total	9,244,100	4.5%	9,486,100	2.6%	Positive



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

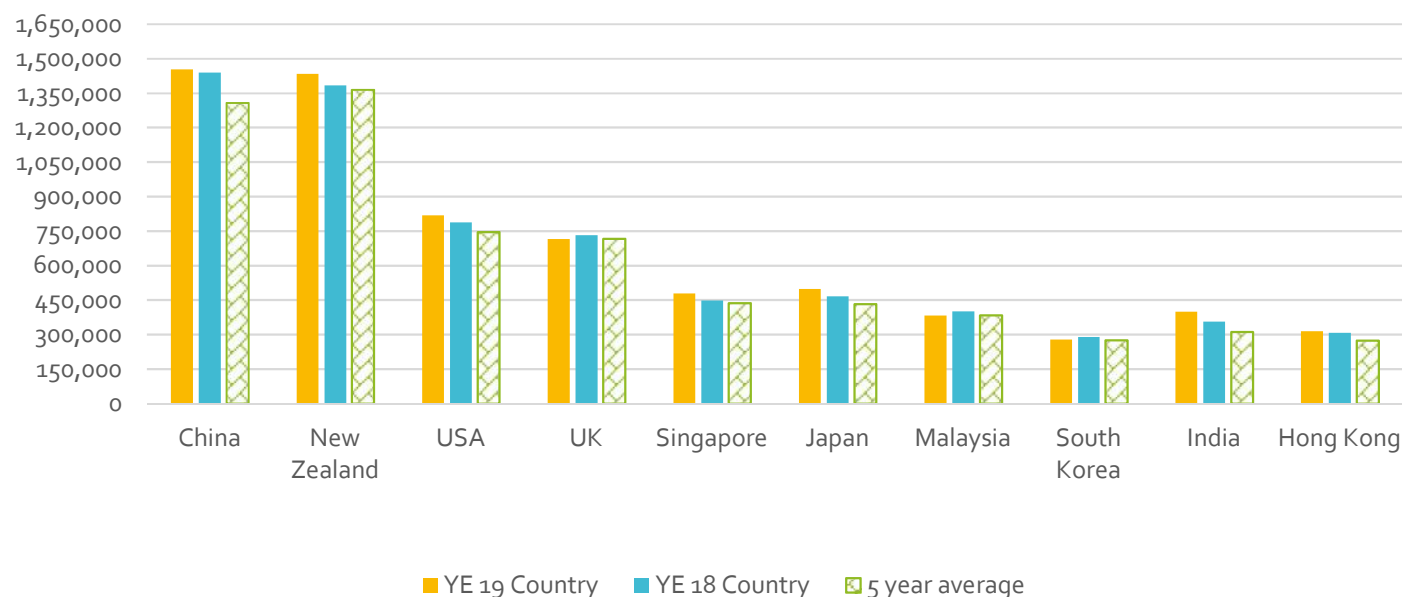
Year end changes to top Australian source markets – December 2019

This section displays the performance of the major Australian source markets for international travellers for the 12 month period ending December 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	1,440,200	4.4%	1,453,200	0.9%	Neutral
New Zealand	1,384,300	2.0%	1,434,400	3.6%	Positive
USA	788,700	0.4%	819,700	3.9%	Positive
UK	732,600	0.6%	716,200	-2.2%	Negative
Singapore	449,000	2.3%	479,300	6.7%	Positive
Japan	467,900	7.6%	499,600	6.8%	Positive
Malaysia	402,100	0.4%	383,800	-4.6%	Negative
South Korea	290,000	-4.4%	279,800	-3.5%	Negative
India	357,900	18.2%	400,400	11.9%	Positive
Hong Kong	307,900	8.3%	316,100	2.7%	Positive
National Total	9,244,100	4.5%	9,486,100	2.6%	Positive



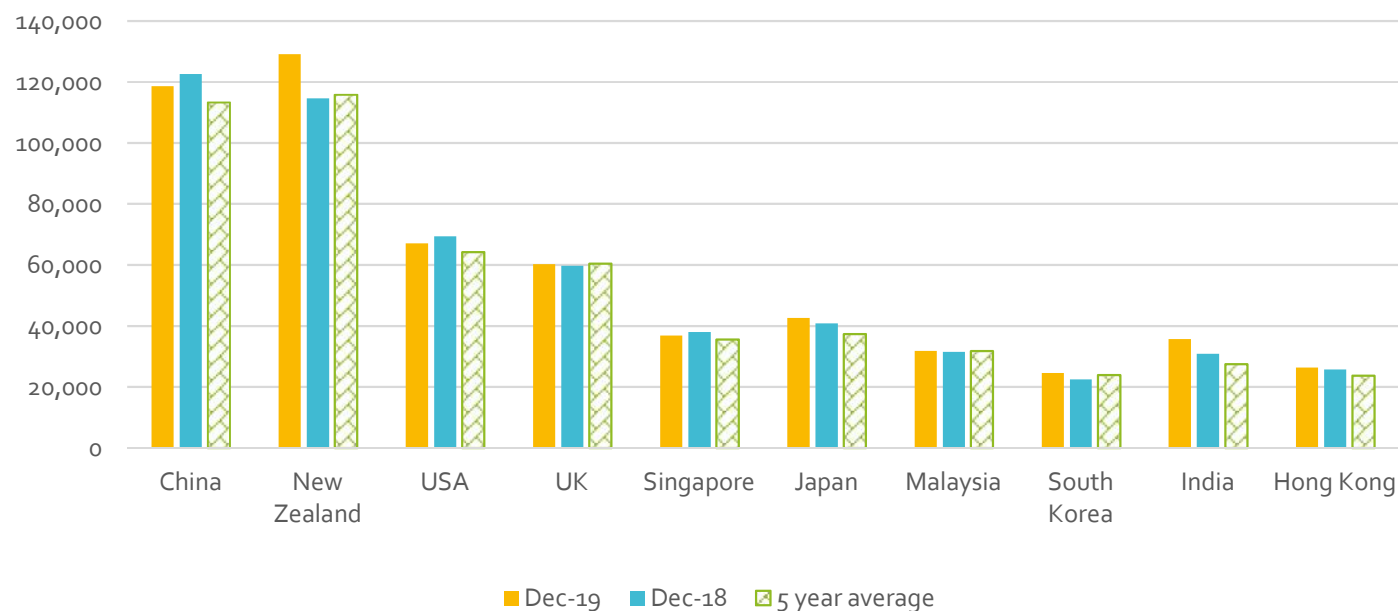
Monthly changes to top Australian source markets – December 2019

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

Key Highlights

- Among the top ten source countries, the highest annual increases were recorded for India, New Zealand and South Korea.
- The largest increase has been India with 15.9% or 4,900 movements.

Destination	Total number of travellers 2018	Change on previous year	Total number of travellers 2019	Change on previous year	2019 Performance
China	122,600	4.6%	118,600	-3.3%	Negative
New Zealand	114,700	3.2%	129,100	12.6%	Positive
USA	69,400	6.6%	67,100	-3.3%	Negative
UK	59,800	-5.5%	60,300	0.8%	Neutral
Singapore	38,100	16.9%	36,900	-3.1%	Negative
Japan	40,900	12.1%	42,700	4.4%	Positive
Malaysia	31,600	0.3%	31,900	0.9%	Neutral
South Korea	22,500	-11.1%	24,600	9.3%	Positive
India	30,900	14.4%	35,800	15.9%	Positive
Hong Kong	25,800	5.3%	26,400	2.3%	Positive
National Total	780,800	4.8%	801,800	2.7%	Positive



Source: December 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 – December 2019

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

Key Highlights

- During December 2019, short-term resident returns (973,400 movements) increased 3.4% when compared to the same period twelve months prior.

Month	Total number of travellers 2018	Change on previous year	Total number of travellers 2019	Change on previous year	2019 Performance
January	894,400	4.6%	940,800	5.2%	Positive
February	878,800	-2.0%	911,400	3.7%	Positive
March	914,500	7.2%	923,700	1.0%	Neutral
April	924,500	3.7%	920,700	-0.4%	Neutral
May	927,000	5.3%	972,800	4.9%	Positive
June	912,800	4.7%	950,000	4.1%	Positive
July	932,500	6.7%	932,100	0.0%	Neutral
August	932,600	6.3%	945,500	1.4%	Neutral
September	920,600	2.6%	949,200	3.1%	Positive
October	946,500	6.2%	947,600	0.1%	Neutral
November	931,600	4.9%	973,200	4.5%	Positive
December	941,400	7.7%	973,400	3.4%	Positive
Total	11,057,200	4.8%	11,340,400	2.6%	Positive



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

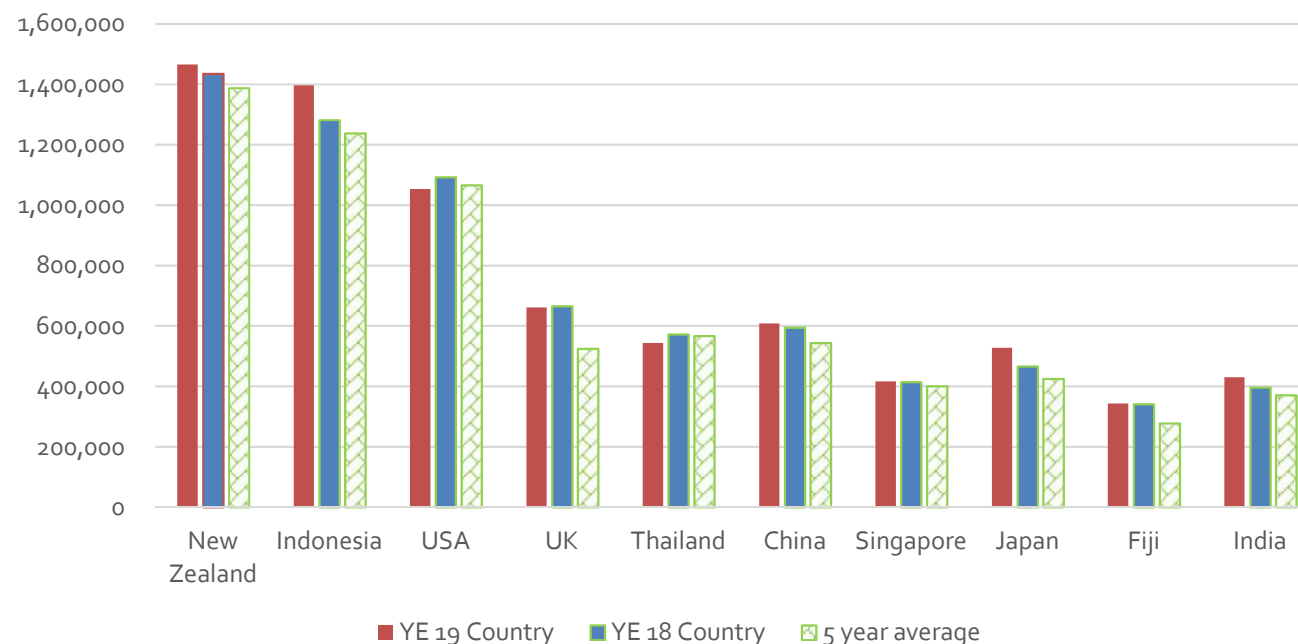
Year end changes to popular international destinations travelled to by Australians – December 2019

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

Key Highlights

- **New Zealand continued to be the leading destination for Australians travelling overseas, with nearly 1.5 million short-term trips in 2019.**
- **The record 11.3 million trips Australians made overseas in 2019 was almost double that of 10 years ago.**
- **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	1,434,600	0.0%	1,466,200	2.2%	Positive
Indonesia	1,280,900	8.7%	1,396,900	9.1%	Positive
USA	1,091,600	1.5%	1,054,100	-3.4%	Negative
UK	665,600	5.7%	661,600	-0.6%	Neutral
Thailand	571,900	-1.5%	543,900	-4.9%	Negative
China	593,600	9.1%	608,800	2.6%	Positive
Singapore	413,900	2.8%	416,800	0.7%	Neutral
Japan	465,800	16.6%	528,500	13.5%	Positive
Fiji	340,900	-1.2%	343,700	0.8%	Neutral
India	396,000	8.3%	430,900	8.8%	Positive
National Total	11,057,200	4.8%	11,340,400	2.6%	Positive



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

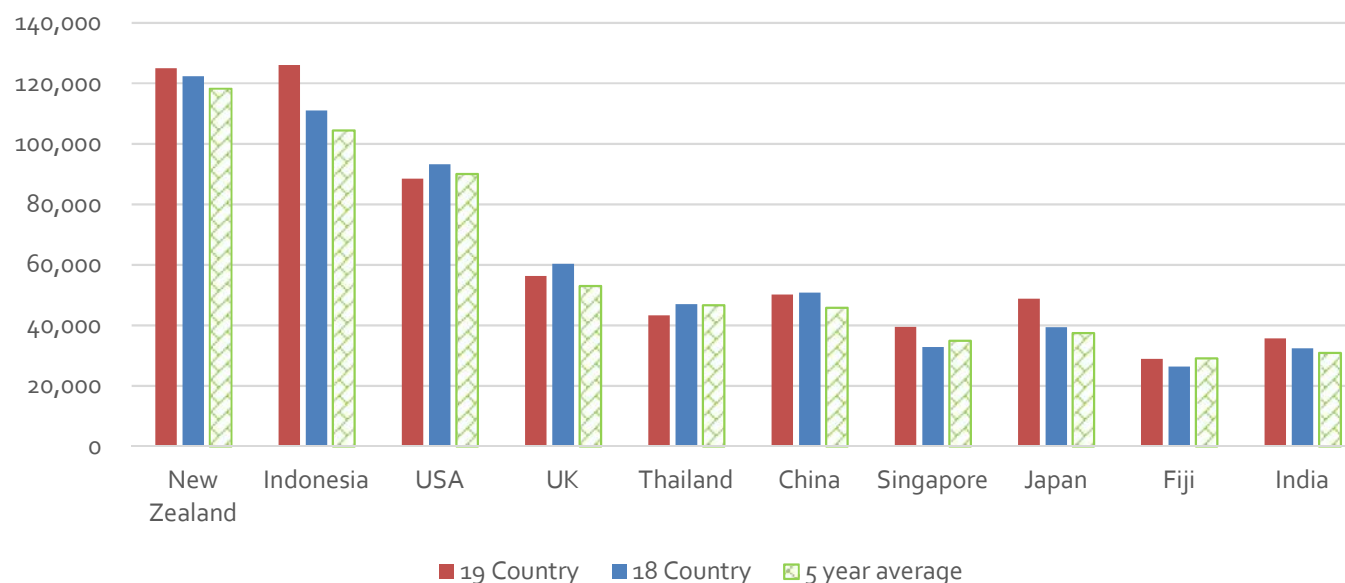
Monthly changes to popular international destinations travelled to by Australians – December 2019

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

Key Highlights

- Among the top 10 destination countries, the strongest growth was for Australians visiting Asian countries.
- USA, UK and Thailand showed negative growth when comparing December 2019 to December 2018.

Destination	Total number of travellers 2018	Change to previous year	Total number of travellers 2019	Change to previous year	2019 Performance
New Zealand	122,400	4.3%	125,000	2.1%	Positive
Indonesia	111,100	31.9%	126,100	13.5%	Positive
USA	93,300	5.3%	88,500	-5.1%	Negative
UK	60,400	14.0%	56,400	-6.6%	Negative
Thailand	47,100	-6.5%	43,300	-8.1%	Negative
China	50,900	5.8%	50,200	-1.4%	Neutral
Singapore	32,900	3.8%	39,500	20.1%	Positive
Japan	39,400	11.6%	48,800	23.9%	Positive
Fiji	26,400	-8.0%	29,000	9.8%	Positive
India	32,400	-1.5%	35,700	10.2%	Positive
National Total	941,400	7.7%	973,400	3.4%	Positive

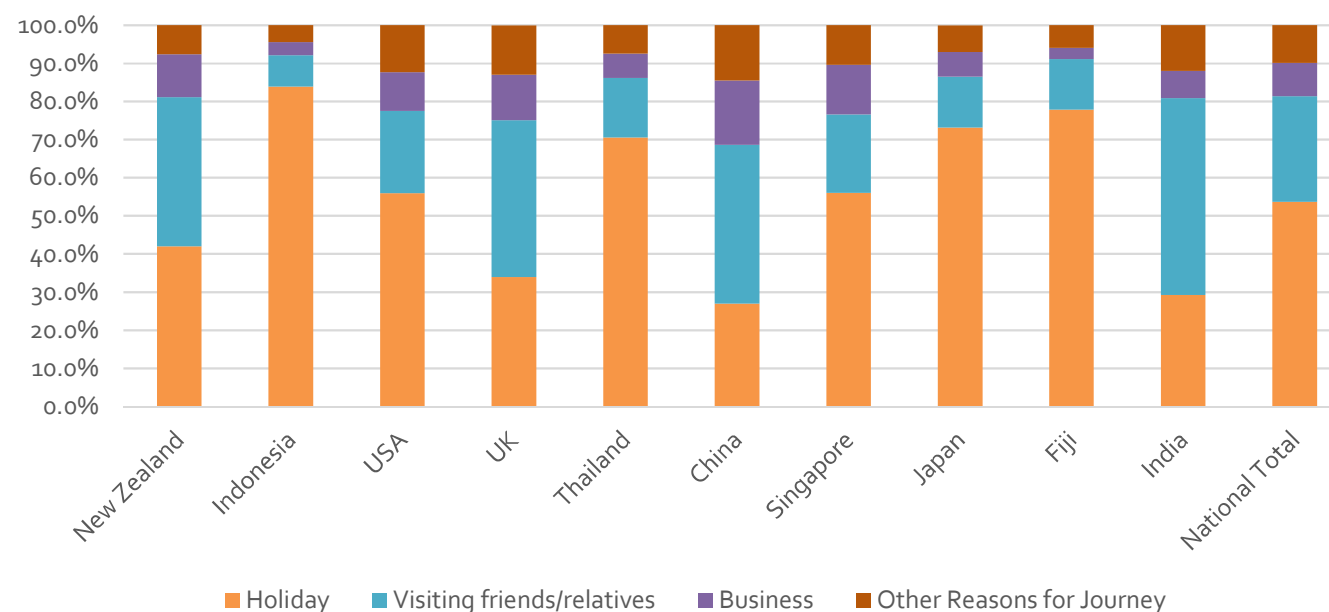


Source: December 2019 Short-term Movement, Residents Returning - Selected Destinations: Seasonally adjusted

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

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

	Holiday	Visiting friends/relatives	Business	Other Reasons for Journey
New Zealand	42.1%	39.0%	11.3%	7.6%
Indonesia	83.9%	8.2%	3.4%	4.5%
USA	56.0%	21.5%	10.1%	12.3%
UK	34.0%	41.1%	11.9%	12.9%
Thailand	70.6%	15.6%	6.4%	7.5%
China	27.0%	41.6%	16.8%	14.5%
Singapore	56.1%	20.5%	13.0%	10.4%
Japan	73.2%	13.3%	6.5%	6.9%
Fiji	77.9%	13.2%	3.0%	5.9%
India	29.3%	51.6%	7.1%	11.9%
National Total	53.7%	27.7%	8.8%	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-four international airlines operated scheduled services to/from Australia during November 2019 (includes five dedicated freight airlines but excludes airlines operating only via code share arrangements).

International scheduled passenger traffic in November 2019 was 3.421 million compared to 3.325 million in November 2018 – an increase of 12.9 per cent.



Source: International Airline Activity—Monthly Publications, November 2019

Airline activity - Month End November 2019

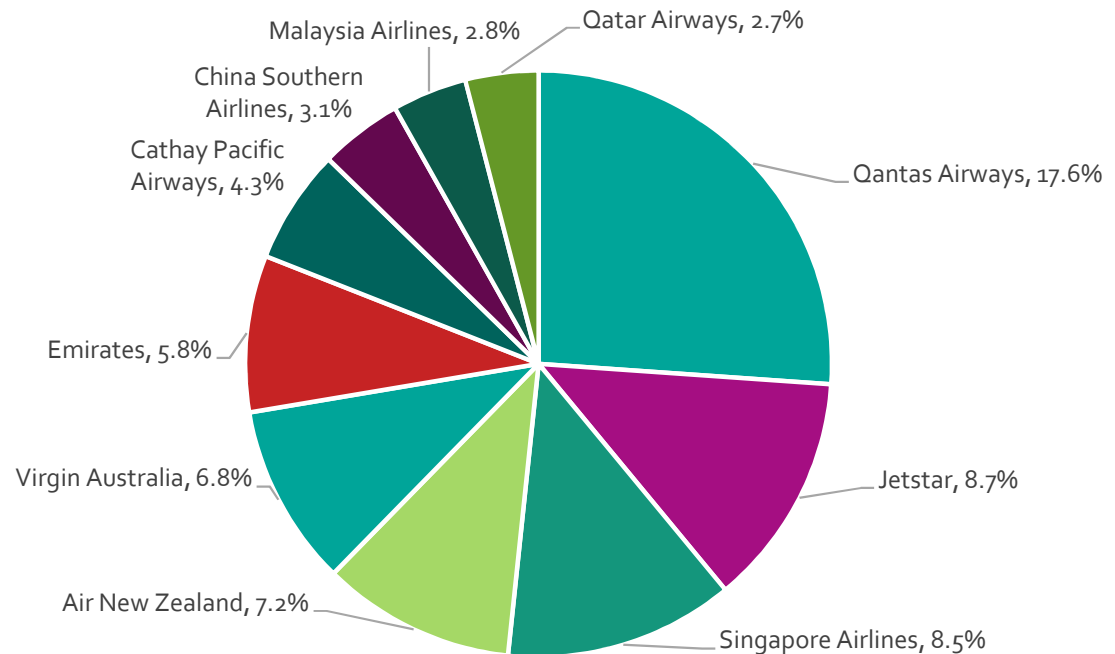
This snapshot displays the market share of the top ten airlines for international travel for the month of November 2019.

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 26.5% of total passenger carriage in November 2019 (the group's share in November 2018 was 26.8%).**
- **The share of passenger traffic accounted for by Australian designated airlines was 33.1% in November 2019. The share was also 33.1% in November 2018.**

Monthly Share of passengers carried	November -18	November -19
Qantas Airways	17.7%	17.6%
Jetstar	9.0%	8.7%
Singapore Airlines	8.2%	8.5%
Air New Zealand	7.4%	7.2%
Virgin Australia	6.4%	6.8%
Emirates	6.8%	5.8%
Cathay Pacific Airways	4.5%	4.3%
China Southern Airlines	3.3%	3.1%
Malaysia Airlines	2.5%	2.8%
Qatar Airways	2.5%	2.7%



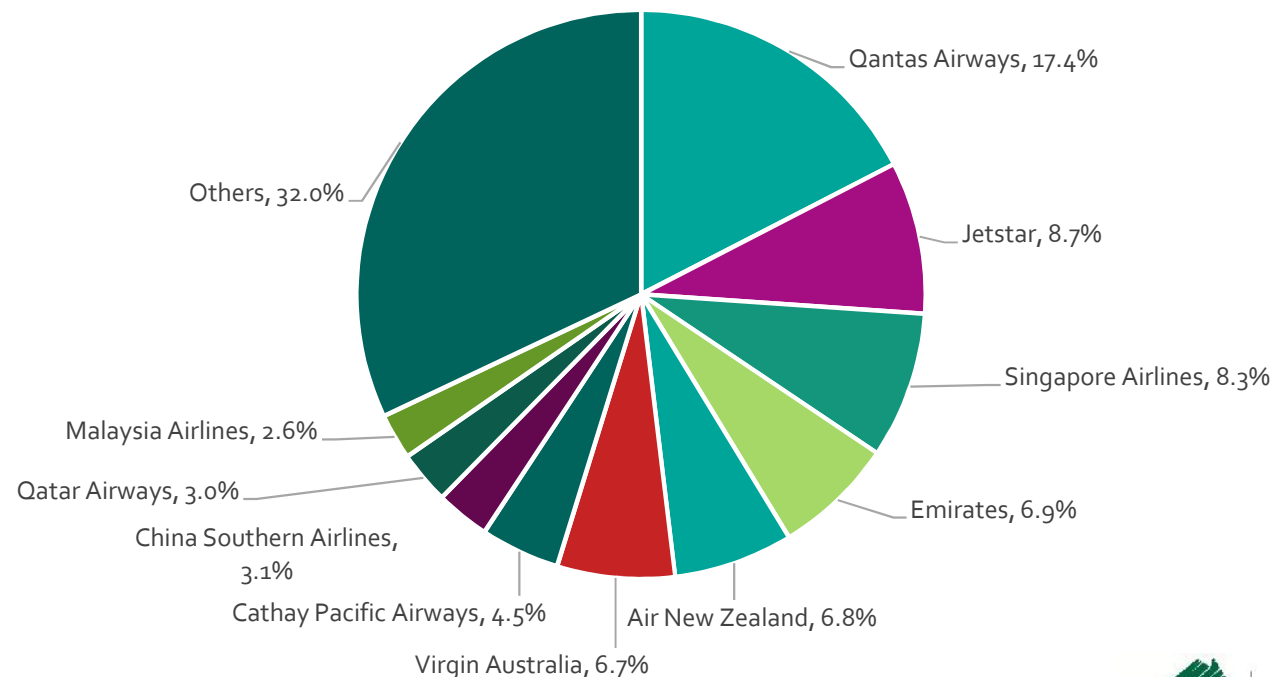
Source: International Airline Activity—Monthly Publications, November 2018 and November 2019

Airline activity – Year End November 2019

This snapshot displays the market share of each airline for international travel of Year end – November 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	November - 18	Year End share of passengers carried	November - 19
Qantas Airways	17.1%	Qantas Airways	17.4%
Jetstar	8.9%	Jetstar	8.7%
Singapore Airlines	8.0%	Singapore Airlines	8.3%
Emirates	7.8%	Emirates	6.9%
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	3.1%	Qatar Airways	3.0%
Etihad Airways	2.9%	Malaysia Airlines	2.6%
Others	31.8%	Others	32.0%



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

For further information please contact:

Courtney Duddleston

Head of Strategy & Finance

E: courtney.duddleston@afta.com.au

Ph: 02 9287 9900

The information contained within this Report has been prepared by AFTA based upon best endeavours to ensure the accuracy and completeness of material.

AFTA accepts no liability for any loss or damage a person suffers because that person has directly or indirectly relied on any information provided by AFTA.

