

ATIA Travel Trends

August 2025

ATIA
Australian Travel
Industry Association



Welcome

Welcome the ATIA Travel Trends which provides insights into the performance of key markets for the Australian Travel and Tourism Industry

This report presents data from Australian Bureau of Statistics (ABS), Department of Infrastructure, analysis by the ATIA team.

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Number of Trips to and from Australia

Total number of inbound tourists & outbound Australians

YE 24 v YE 25

This snapshot provides an overview of the trade balance between Inbound and Outbound Travel for Year-end June 2025.

It uses information from the Australian Bureau of Statistics (ABS) Overseas Arrivals and Departures (OAD) data set.

The outbound destination for Australian travellers is determined by the country in which they board their flight back to Australia.

Country	June YE 2024 Total number of international visitors to Australia	June YE 2025 Total number of international visitors to Australia	June YE 2024 Total number of international trips by Australians	June YE 2025 Total number of international trips by Australians
	<i>Inbound</i>	<i>Inbound</i>	<i>Outbound</i>	<i>Outbound</i>
New Zealand	1,367,380	1,391,150	1,309,850	1,409,320
China	800,380	953,200	520,200	652,950
USA	714,770	714,780	714,290	746,220
UK	615,280	669,390	618,570	635,530
India	416,430	451,110	515,000	590,550
Singapore	392,340	422,670	339,610	372,420
Japan	360,130	397,100	702,730	910,640
South Korea	353,160	373,540	119,760	136,030
Indonesia	215,700	226,650	1,531,190	1,741,360
Hong Kong	211,240	220,610	164,090	184,390
Malaysia	194,380	199,540	256,670	288,630
Vietnam	178,270	164,630	388,570	490,500
Philippines	169,050	178,150	252,440	289,080
National Total	7,966,130	8,402,500	10,986,570	12,261,040



Inbound Tourism Report

Introduction

These snapshots provide an overview of the performance of the Australian inbound tourism sector.

Inbound tourism is defined as an Australian Export.

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.

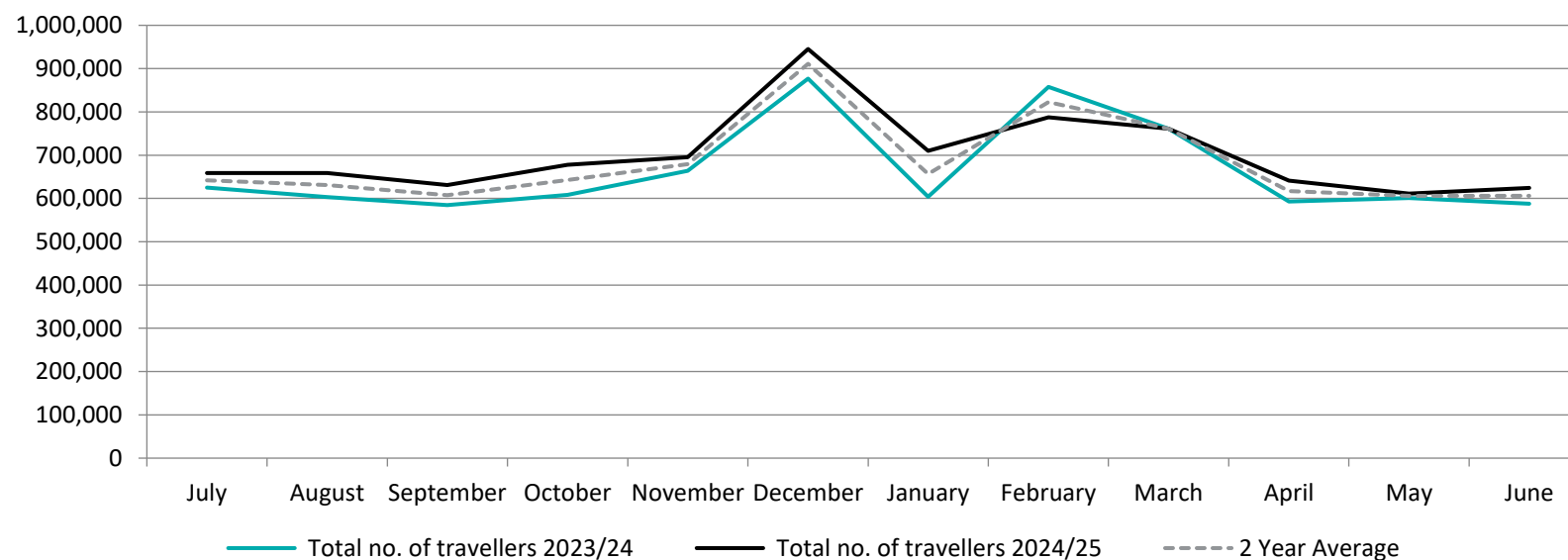
A neutral rating is provided for markets that have a year-on-year variation of (+/-) 2%.

Monthly -Total inbound tourists to Australia.

YE 23 v YE 24

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

Month	Total number of travellers 2023/24	Total number of travellers 2024/25	Change on previous year	2024/245 Performance
July	625,100	658,970	5.4%	Positive
August	603,360	658,820	9.2%	Positive
September	584,650	630,690	7.9%	Positive
October	607,920	677,440	11.4%	Positive
November	663,780	695,350	4.8%	Positive
December	876,850	945,260	7.8%	Positive
January	603,790	710,030	17.6%	Positive
February	857,950	787,800	-8.2%	Negative
March	761,110	761,250	0.0%	Neutral
April	593,100	641,140	8.1%	Positive
May	600,770	611,220	1.7%	Neutral
June	587,750	624,530	6.3%	Positive
National Total	7,966,130	8,402,500	5.5%	Positive

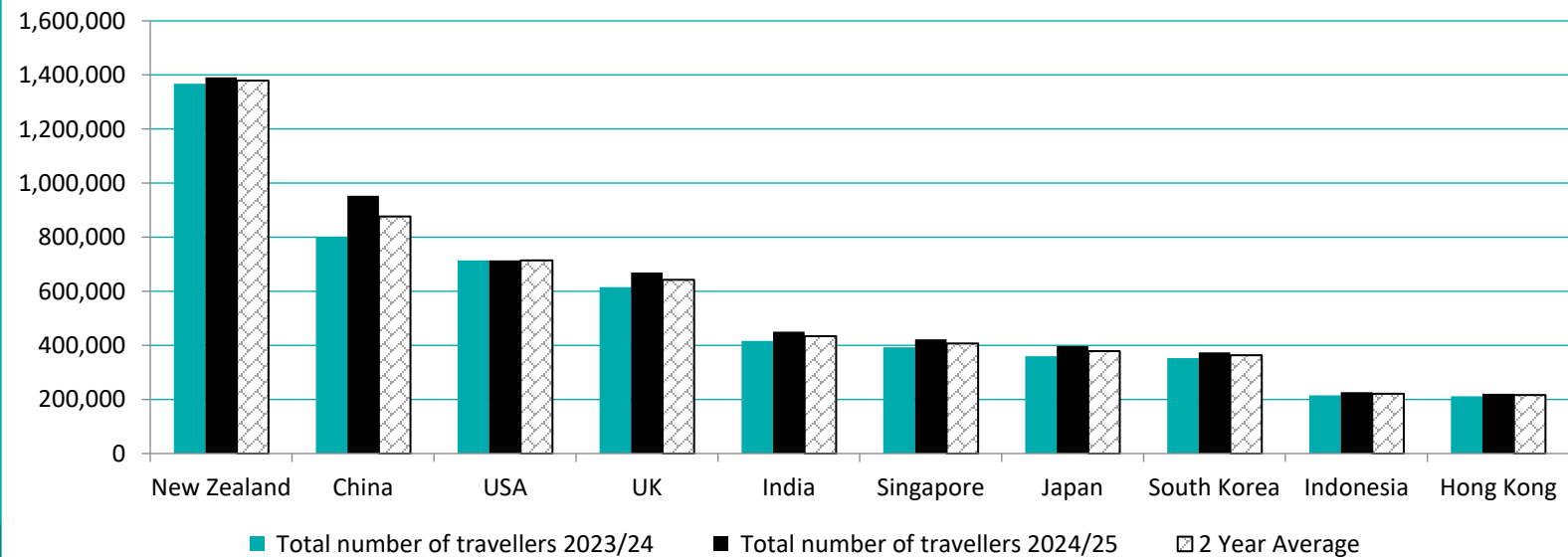


Yearly – Origin of inbound tourists to Australia.

YE 24 v YE 25

This section displays the performance of the major Australian source markets for international travellers for the 12 month period ending June 2025.

Country	Total number of travellers 2023/24	Total number of travellers 2024/25	Change on previous year	2024/25 Performance
New Zealand	1,367,380	1,391,150	1.7%	Neutral
China	800,380	953,200	19.1%	Positive
USA	714,770	714,780	0.0%	Neutral
UK	615,280	669,390	8.8%	Positive
India	416,430	451,110	8.3%	Positive
Singapore	392,340	422,670	7.7%	Positive
Japan	360,130	397,100	10.3%	Positive
South Korea	353,160	373,540	5.8%	Positive
Indonesia	215,700	226,650	5.1%	Positive
Hong Kong	211,240	220,610	4.4%	Positive
National Total	7,966,130	8,402,500	5.5%	Positive

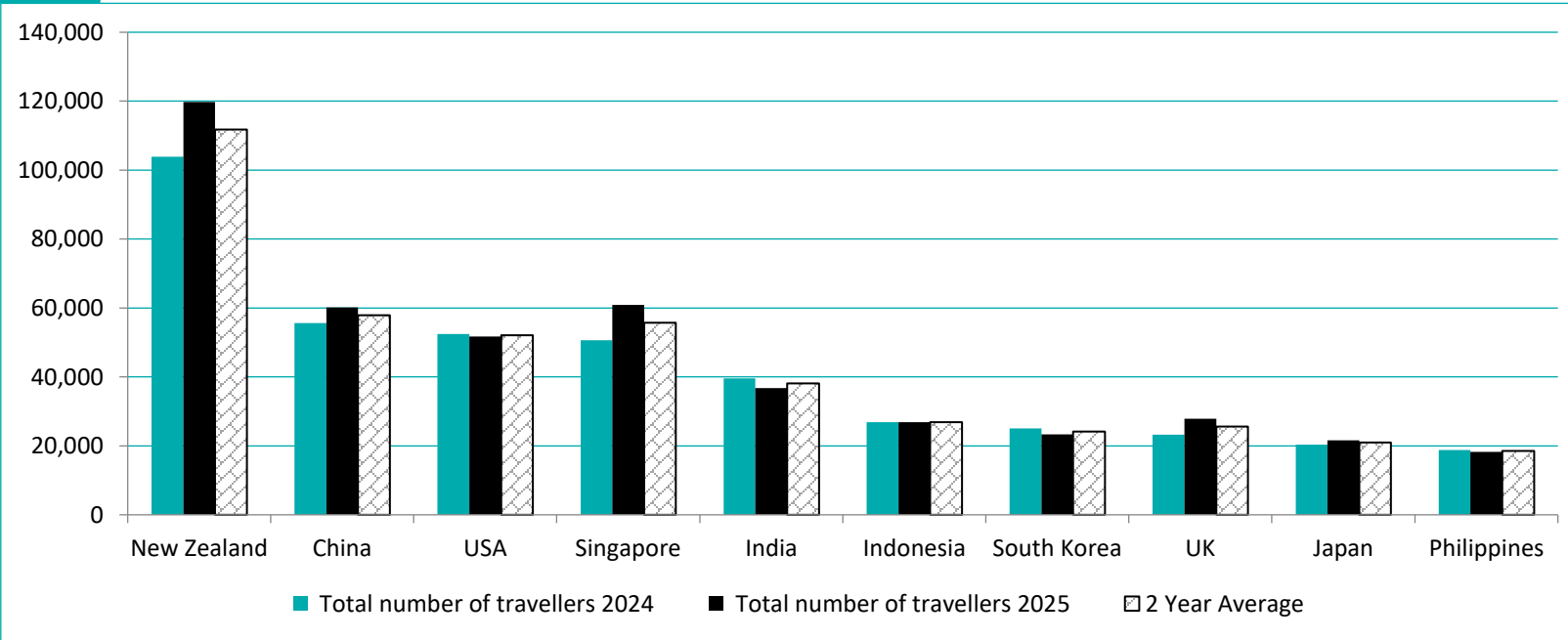


Origin of inbound tourists to Australia.

June 24 v June 25

This section displays the performance of the major Australian source markets for international tourists comparing the month of June 2024 to June 2025.

	Total number of travellers June 24	Total number of travellers June 25	Change on previous year	2024/25 Performance
New Zealand	103,850	119,730	15.3%	Positive
China	55,670	60,200	8.1%	Positive
USA	52,460	51,750	-1.4%	Neutral
Singapore	50,610	60,860	20.3%	Positive
India	39,550	36,770	-7.0%	Negative
Indonesia	26,870	26,890	0.1%	Neutral
South Korea	25,050	23,300	-7.0%	Negative
UK	23,230	27,900	20.1%	Positive
Japan	20,310	21,570	6.2%	Positive
Philippines	18,800	18,240	-3.0%	Negative
National Total	587,750	624,530	6.3%	Positive



Outbound Travel Report

Introduction

These snapshots provide an overview of the performance of the Australian outbound travel sector.

Outbound International travel is defined as an Australian Import.

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.

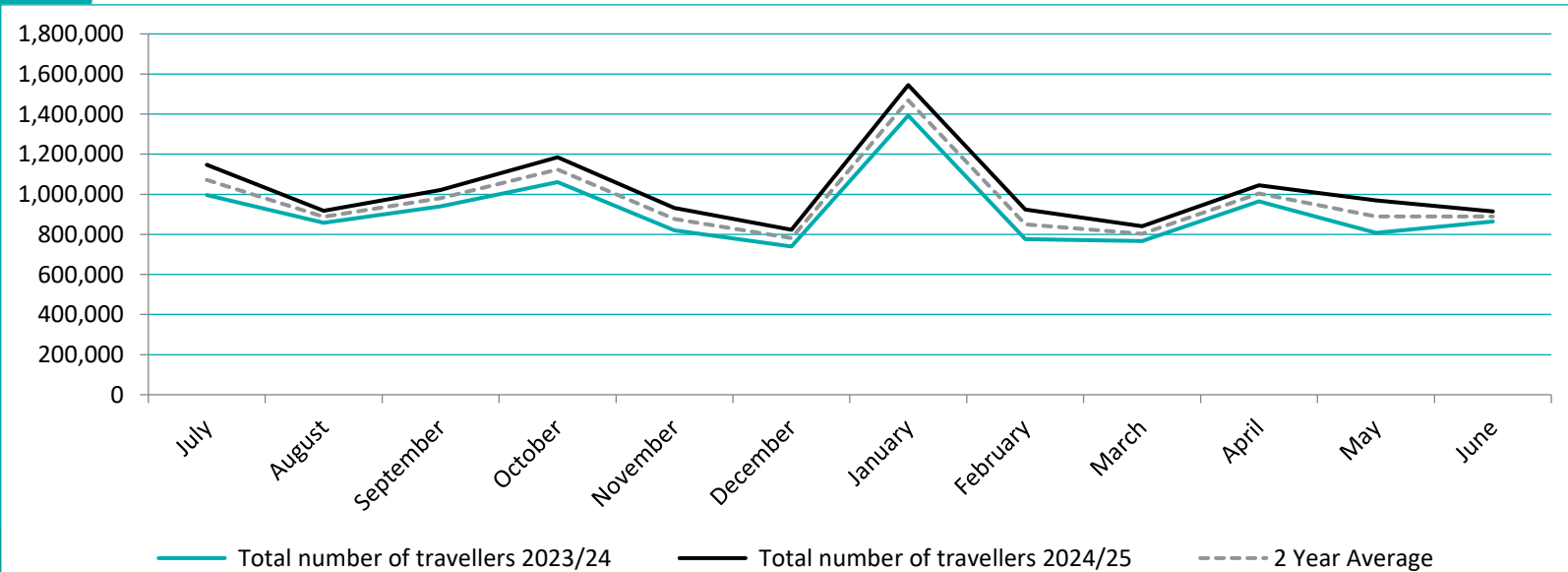
A neutral rating is provided for markets which have a year on year variation of (+/-) 2%.

Monthly - Total outbound Australian travellers.

YE 24 v YE 25

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

	Total number of travellers 2023/24	Total number of travellers 2024/25	Change on previous year	2024/25 Performance
July	995,570	1,146,340	15.1%	Positive
August	858,560	916,880	6.8%	Positive
September	938,980	1,021,000	8.7%	Positive
October	1,061,360	1,184,900	11.6%	Positive
November	820,750	931,970	13.6%	Positive
December	739,570	822,990	11.3%	Positive
January	1,392,860	1,544,870	10.9%	Positive
February	775,630	923,340	19.0%	Positive
March	767,120	840,070	9.5%	Positive
April	964,300	1,044,530	8.3%	Positive
May	807,920	970,070	20.1%	Positive
June	863,950	914,080	5.8%	Positive
National Total	10,986,570	12,261,040	11.6%	Positive

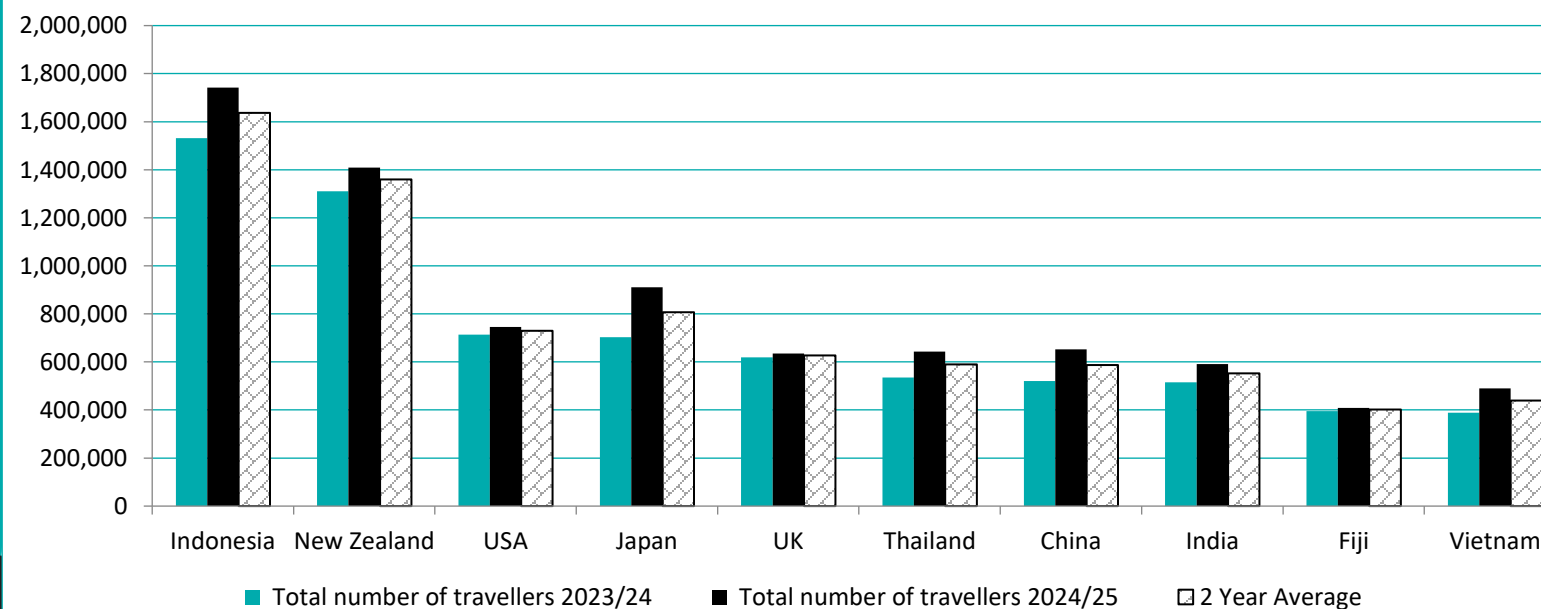


Yearly – Australian outbound destinations.

YE 24 v YE 25

This section displays the performance of the major destinations Australians are travelling to as of June Year end 2024 and 2025.

	Total number of travellers 2023/24	Total number of travellers 2024/25	Change on previous year	2024/25 Performance
Indonesia	1,531,190	1,741,360	13.7%	Positive
New Zealand	1,309,850	1,409,320	7.6%	Positive
USA	714,290	746,220	4.5%	Positive
Japan	702,730	910,640	29.6%	Positive
UK	618,570	635,530	2.7%	Positive
Thailand	535,240	643,530	20.2%	Positive
China	520,200	652,950	25.5%	Positive
India	515,000	590,550	14.7%	Positive
Fiji	395,840	408,230	3.1%	Positive
Vietnam	388,570	490,500	26.2%	Positive
National Total	10,986,570	12,261,040	11.6%	Positive

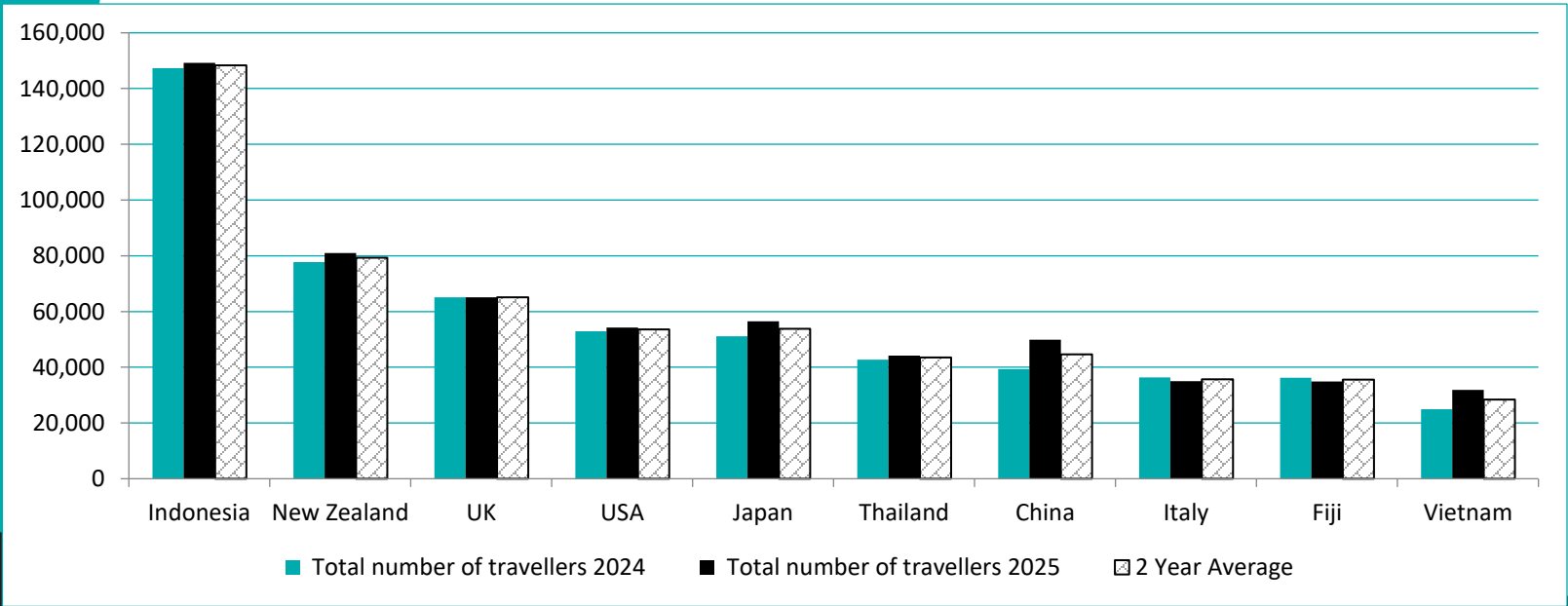


Monthly – Australian
outbound destinations.

June 24 v June 25

This section displays the performance of the major destinations Australians are travelling to, comparing June 2024 to June 2025.

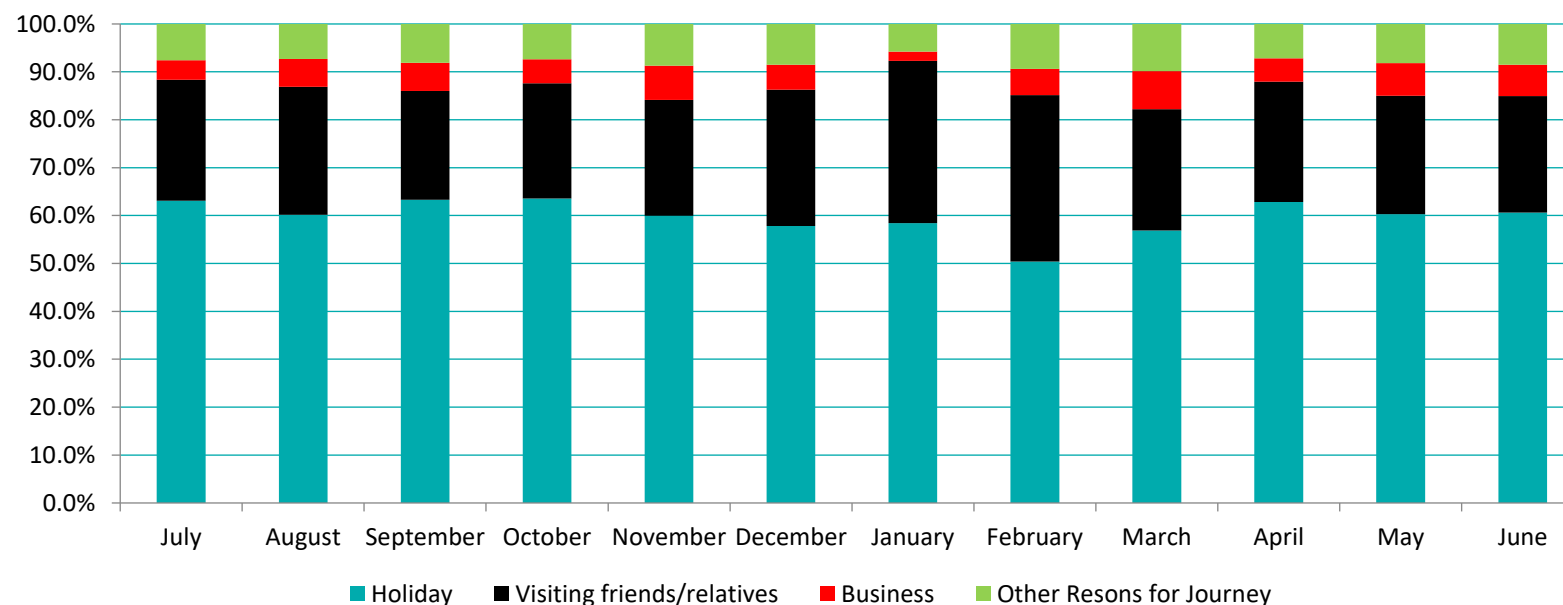
	Total number of travellers Apr 24	Total number of travellers Apr 25	Change on previous year	2024/25 Performance
Indonesia	147,360	149,260	1.3%	Neutral
New Zealand	77,760	80,960	4.1%	Positive
UK	65,090	65,130	0.1%	Neutral
USA	52,910	54,240	2.5%	Positive
Japan	51,160	56,530	10.5%	Positive
Thailand	42,780	44,130	3.2%	Positive
China	39,330	49,890	26.8%	Positive
Italy	36,300	35,000	-3.6%	Negative
Fiji	36,240	34,840	-3.9%	Negative
Vietnam	24,980	31,840	27.5%	Positive
National Total	863,950	914,080	5.8%	Positive



Reasons to travel to popular international destinations by Australians

This section displays the reason for travel monthly up to YE June 2025.

	Holiday	Visiting friends/relatives	Business	Other Resons for Journey
July	63.1%	25.2%	4.1%	7.5%
August	60.2%	26.7%	5.8%	7.3%
September	63.3%	22.7%	5.9%	8.1%
October	63.6%	24.0%	5.0%	7.4%
November	60.0%	24.2%	7.2%	8.7%
December	57.8%	28.5%	5.3%	8.5%
January	58.4%	33.9%	1.9%	5.8%
February	50.4%	34.8%	5.5%	9.4%
March	56.9%	25.3%	8.0%	9.9%
April	62.8%	25.1%	4.9%	7.2%
May	60.3%	24.7%	6.8%	8.2%
June	60.6%	24.3%	6.6%	8.5%





International Airline Market Share

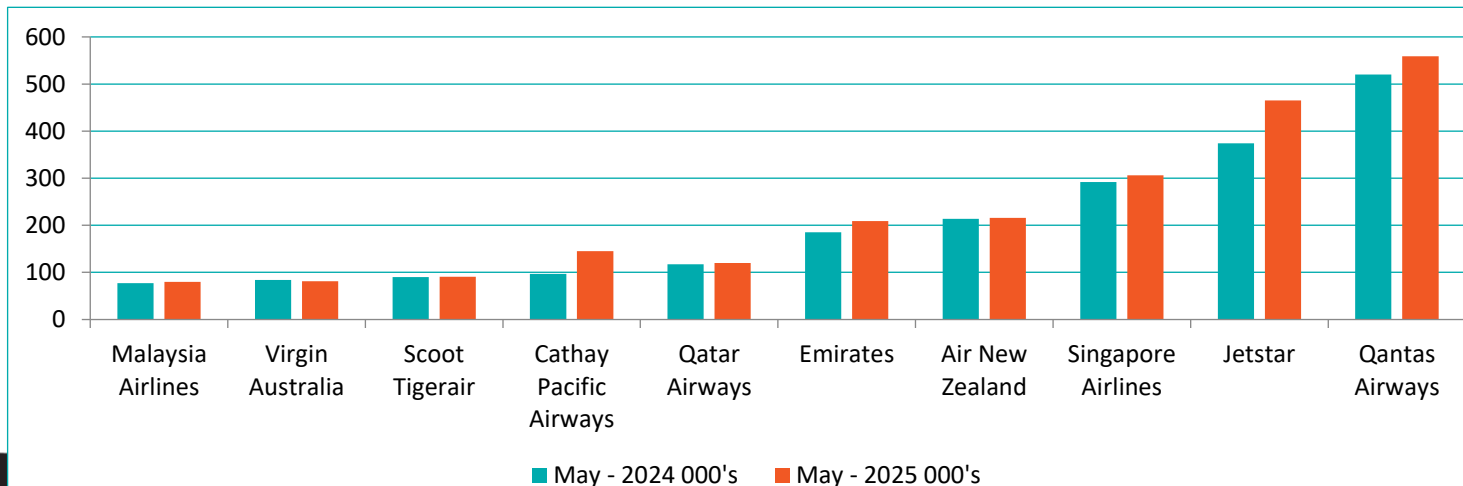
Airline share of passengers.

YE 23 v YE 24

This snapshot displays the market share of the top ten airlines for international travel for year end May 2025 compared to the same year end May 2024.

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.

Share of passengers carried	YE 2023/2024 passengers carried 000's	YE 2023/2024 Market Share	YE 2024/2025 passengers carried 000's	YE 2024/2025 Market Share
Malaysia Airlines	77	2.6%	80	2.4%
Virgin Australia	84	2.8%	81	2.4%
Scoot Tigerair	90	3.0%	91	2.7%
Cathay Pacific Airways	97	3.2%	145	4.3%
Qatar Airways	117	3.9%	120	3.6%
Emirates	185	6.1%	209	6.3%
Air New Zealand	214	7.1%	216	6.4%
Singapore Airlines	292	9.6%	306	9.1%
Jetstar	374	12.4%	465	13.9%
Qantas Airways	520	17.2%	559	16.7%
Others	976	32.2%	1,076	32.1%
All Airline Total	3,027		3,348	



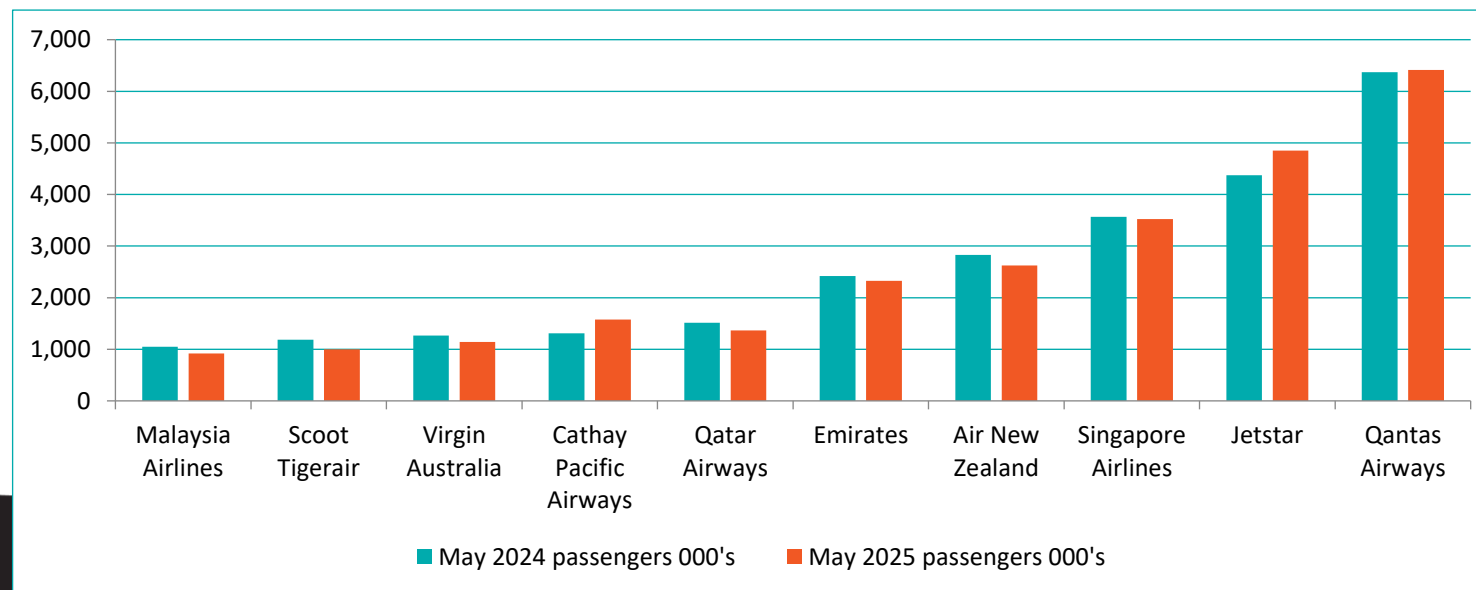
Airline share of passengers. May 2024 v May2025

ME 23 v ME 24

This snapshot displays the market share of the top ten airlines for international travel for the month of May 2025 compared to May 2024.

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

Monthly Share of passengers carried	May 2024 passengers carried 000's	May 2024 Market Share	May 2025 passengers carried 000's	May 2025 Market Share
Malaysia Airlines	1,050	2.7%	920	2.3%
Scoot Tigerair	1,183	3.0%	1,002	2.6%
Virgin Australia	1,267	3.3%	1,140	2.9%
Cathay Pacific Airways	1,311	3.4%	1,573	4.0%
Qatar Airways	1,514	3.9%	1,365	3.5%
Emirates	2,422	6.2%	2,328	5.9%
Air New Zealand	2,830	7.3%	2,625	6.7%
Singapore Airlines	3,565	9.2%	3,526	9.0%
Jetstar	4,372	11.3%	4,852	12.4%
Qantas Airways	6,371	16.4%	6,416	16.4%





Domestic Airline Market activity

Airline share of passengers.

May 24 v May 25

This snapshot displays the market share of the top ten airlines for domestic travel for month end May 2025 compared to the same month end May 2024.

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

	Number of Seats May 2024	Number of Seats May 2025	Number of seats % Change 24 V 25	Load factors 24 (%)	Load Factors 25 (%)
Perth - Sydney	150,466	167,656	11.4	89.0	86.0
Hobart - Melbourne	153,672	144,293	-6.1	81.0	87.0
Adelaide - Sydney	193,967	191,227	-1.4	83.0	87.0
Melbourne - Perth	208,617	197,073	-5.5	83.0	86.0
Gold Coast - Melbourne	219,181	173,314	-20.9	86.0	77.0
Adelaide - Melbourne	250,272	241,783	-3.4	83.0	87.0
Gold Coast - Sydney	251,506	187,477	-25.5	84.0	84.0
Brisbane - Melbourne	347,056	323,170	-6.9	81.0	82.0
Brisbane - Sydney	451,159	392,794	-12.9	81.0	84.0
Melbourne - Sydney	861,574	817,468	-5.1	82.0	88.0

