ATIA Travel Trends

November 2026



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.

Disclaimer: Before acting on any information in this report, you should consider the appropriateness of the information provided and the nature in which you use this data and insights. ATIA accepts no liability for any loss or damage a person suffers because that person has directly or indirectly relied on any information provided by ATIA.

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Number of Trips to and from Australia

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Total number of inbound tourists & outbound Australians

YE 25 v YE 26

This snapshot provides an overview of the trade balance between Inbound and Outbound Travel for Year-end September 2026.

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	September YE 2025 Total number of international visitors to Australia *Inbound*	September YE 2026 Total number of international visitors to Australia *Inbound*	September YE 2025 Total number of international trips by Australians *Outbound*	September YE 2026 Total number of international trips by Australians *Outbound*
New Zealand	1,411,900	1,426,190	1,429,410	1,509,880
China	991,940	1,164,850	667,920	756,830
USA	730,340	760,280	730,290	672,030
UK	701,760	727,840	641,740	583,060
India	454,520	430,800	593,260	624,960
Singapore	438,300	443,220	369,690	398,060
Japan	407,950	459,550	923,200	983,510
South Korea	371,690	393,100	136,310	150,720
Hong Kong	238,430	240,600	182,670	185,030
Indonesia	233,130	240,960	1,755,290	1,822,190
Malaysia	206,440	208,930	294,280	314,860
Philippines	182,830	199,440	291,430	303,660
Taiwan	181,860	210,660	82,190	89,730
National Total	**8,647,080**	**9,078,020**	**12,404,170**	**12,787,110**

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Inbound Tourism Report

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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 indictors are provided for each market and month.

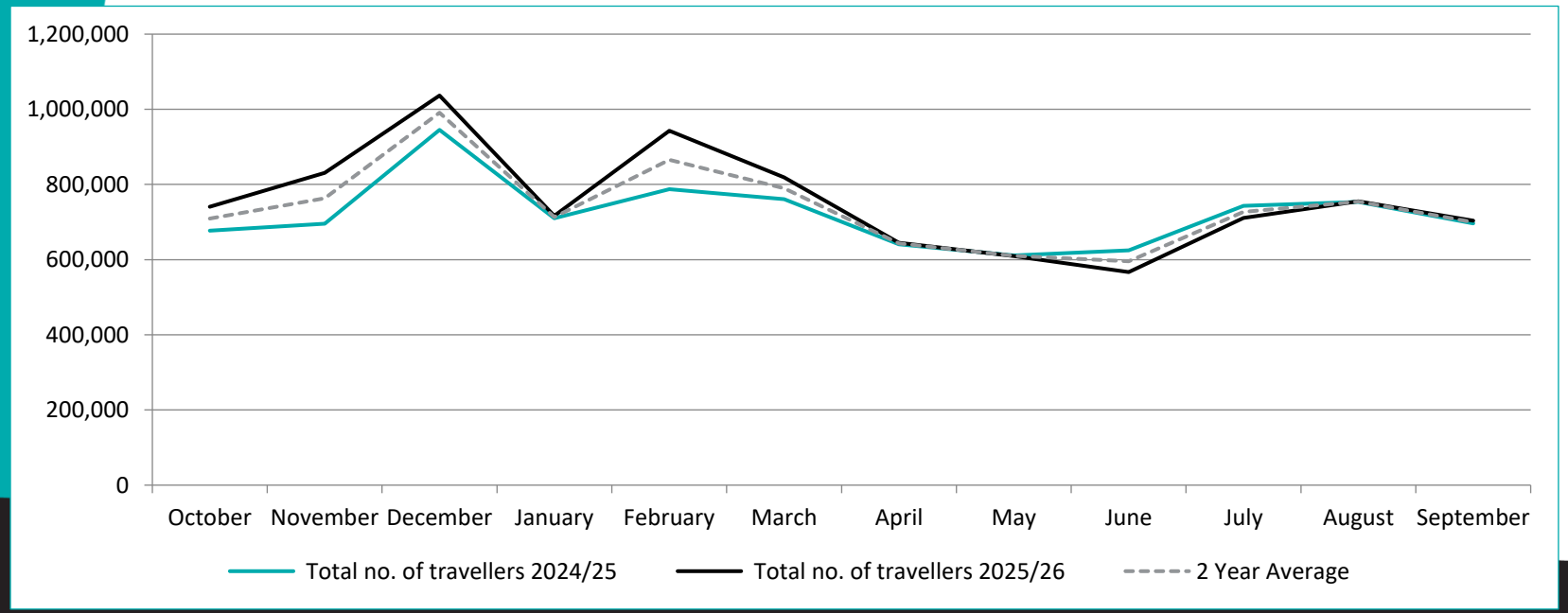
A neutral rating is provided for markets that have a year-on-year variation of (+/-) 2%.

Monthly -Total inbound tourists to Australia.

Sept YE 25 v Sept YE 26

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

Month	Total number of travellers 2024/25	Total number of travellers 2025/26	Change on previous year	2025/2026 Performance
October	677,440	740,630	9.3%	Positive
November	695,350	831,180	19.5%	Positive
December	945,260	1,036,670	9.7%	Positive
January	710,030	716,670	0.9%	Neutral
February	787,800	943,190	19.7%	Positive
March	761,250	818,970	7.6%	Positive
April	641,140	644,790	0.6%	Neutral
May	611,220	609,070	-0.4%	Neutral
June	624,530	566,890	-9.2%	Negative
July	743,200	710,970	-4.3%	Negative
August	753,350	755,520	0.3%	Neutral
September	696,510	703,470	1.0%	Neutral
National Total	**8,647,080**	**9,078,020**	**5.0%**	**Positive**



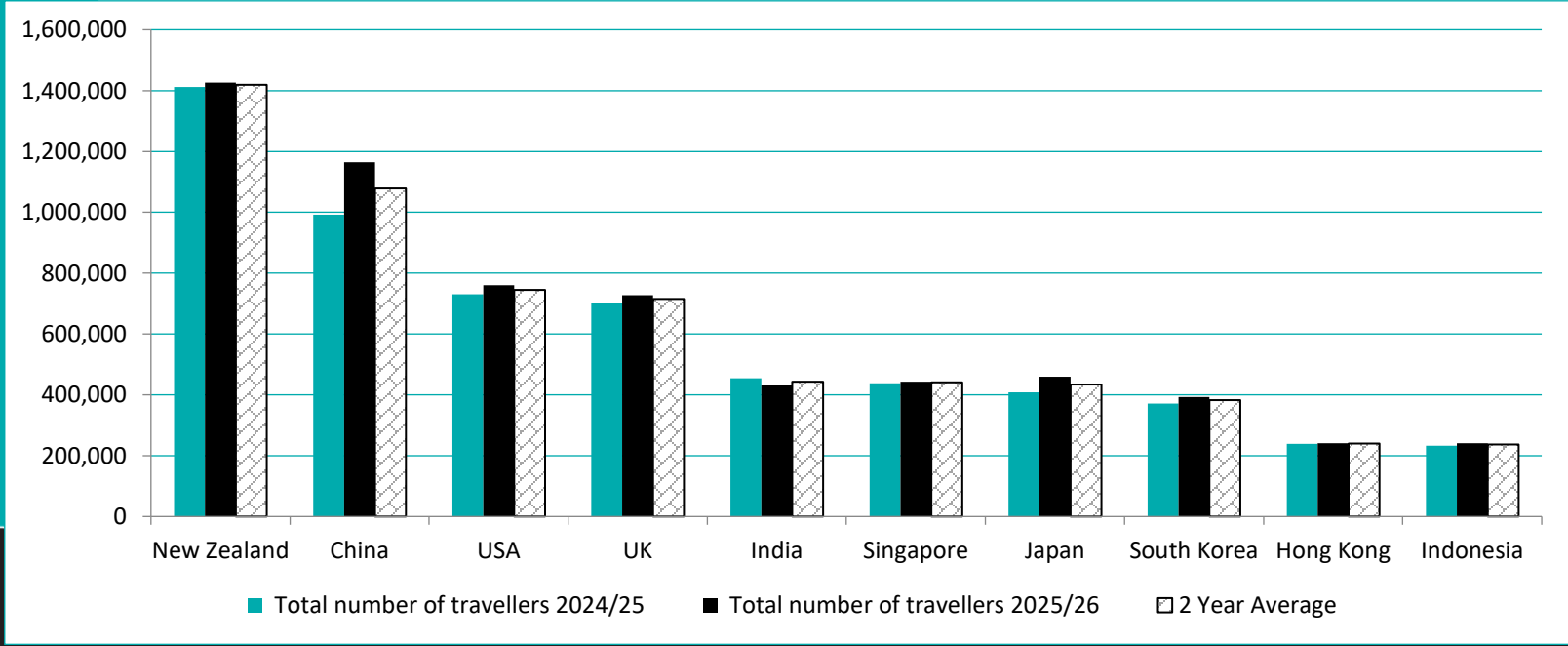
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Yearly – Origin of inbound tourists to Australia.

Sept YE 25 v Sept YE 26

This section displays the performance of the major Australian source markets for international travellers for the 12 month period ending September 2026.

Country	Total number of travellers 2024/25	Total number of travellers 2025/26	Change on previous year	2025/2026 Performance
New Zealand	1,411,900	1,426,190	1.0%	Neutral
China	991,940	1,164,850	17.4%	Positive
USA	730,340	760,280	4.1%	Positive
UK	701,760	727,840	3.7%	Positive
India	454,520	430,800	-5.2%	Negative
Singapore	438,300	443,220	1.1%	Neutral
Japan	407,950	459,550	12.6%	Positive
South Korea	371,690	393,100	5.8%	Positive
Hong Kong	238,430	240,600	0.9%	Neutral
Indonesia	233,130	240,960	3.4%	Positive
National Total	**8,647,080**	**9,078,020**	**5.0%**	**Positive**



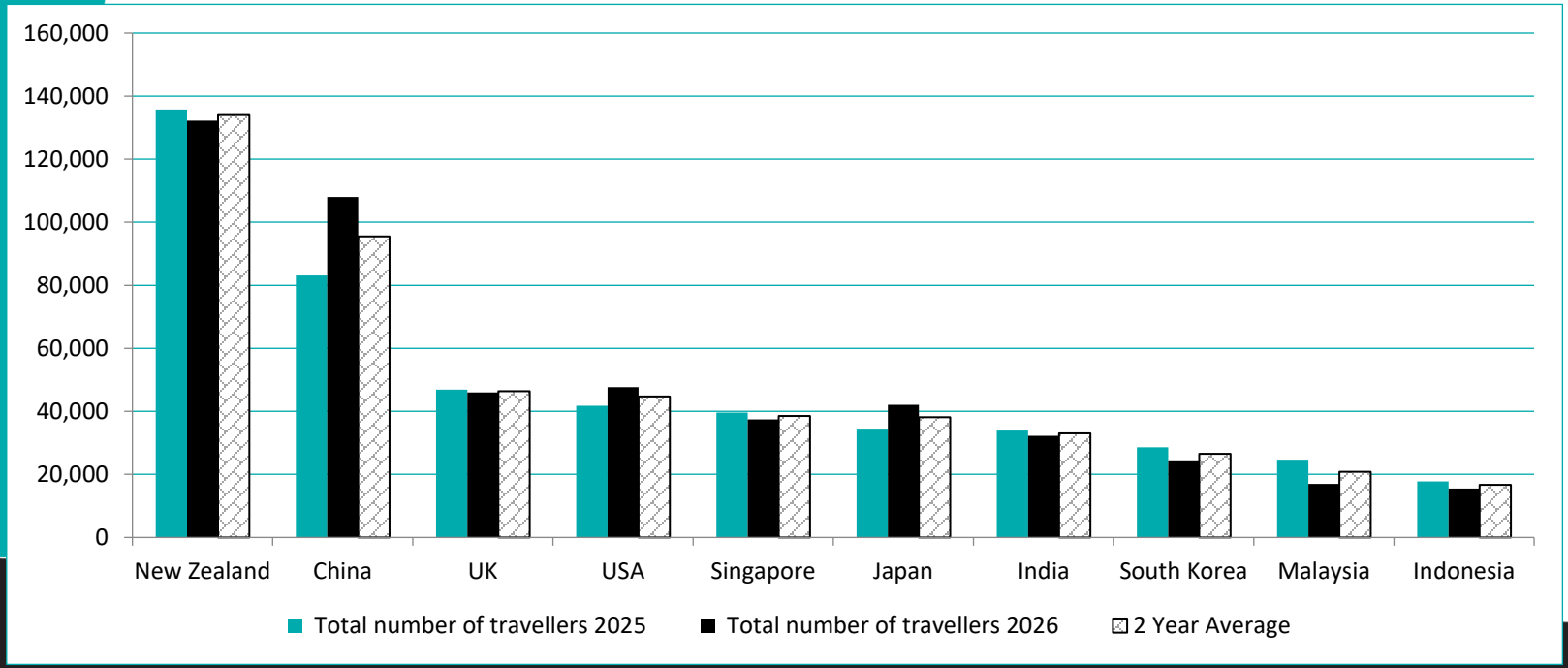
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Origin of inbound tourists to Australia.

Sept 25 v Sept 26

This section displays the performance of the major Australian source markets for international tourists comparing the month of September 2025 to September 2026.

	Total number of travellers Sept 25	Total number of travellers Sept 26	Change on previous year	2025/26 Performance
New Zealand	135,720	132,250	-2.6%	Negative
China	83,080	108,010	30.0%	Positive
UK	46,900	45,980	-2.0%	Neutral
USA	41,820	47,720	14.1%	Positive
Singapore	39,590	37,430	-5.5%	Negative
Japan	34,260	42,130	23.0%	Positive
India	33,870	32,270	-4.7%	Negative
South Korea	28,570	24,460	-14.4%	Negative
Malaysia	24,710	16,950	-31.4%	Negative
Indonesia	17,820	15,540	-12.8%	Negative
National Total	**696,510**	**703,470**	**1.0%**	**Neutral**



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Outbound Travel Report

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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 indictors are provided for each market and month.

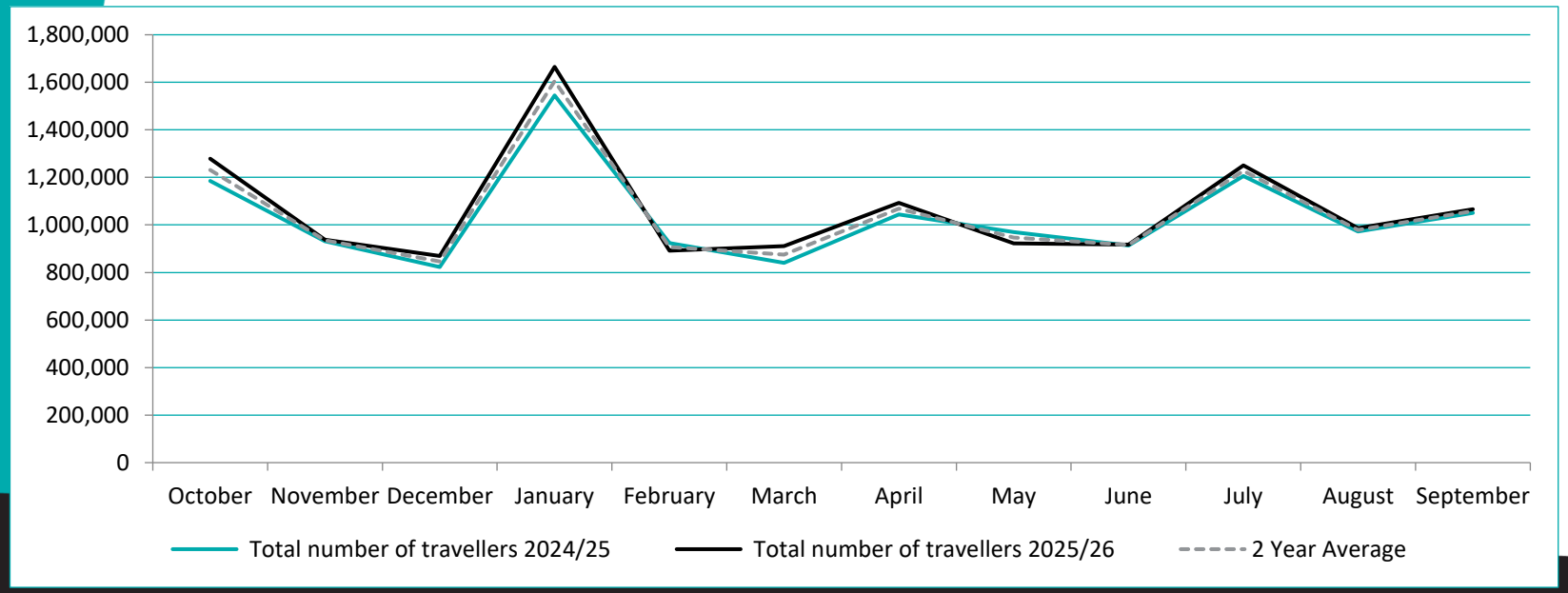
A neutral rating is provided for markets which have a year on year variation of (+/-) 2%.

Monthly -Total outbound Australian travellers.

YE 25 v YE 26

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

	Total number of travellers 2024/25	Total number of travellers 2025/26	Change on previous year	2025/256 Performance
October	1,184,900	1,278,190	7.9%	Positive
November	931,970	937,320	0.6%	Neutral
December	822,990	869,380	5.6%	Positive
January	1,544,870	1,665,070	7.8%	Positive
February	923,340	891,440	-3.5%	Negative
March	840,070	910,450	8.4%	Positive
April	1,044,530	1,092,380	4.6%	Positive
May	970,070	922,490	-4.9%	Negative
June	914,080	917,510	0.4%	Neutral
July	1,205,180	1,250,550	3.8%	Positive
August	972,060	986,230	1.5%	Neutral
September	1,050,110	1,066,100	1.5%	Neutral
National Total	**12,404,170**	**12,787,110**	**3.1%**	**Positive**



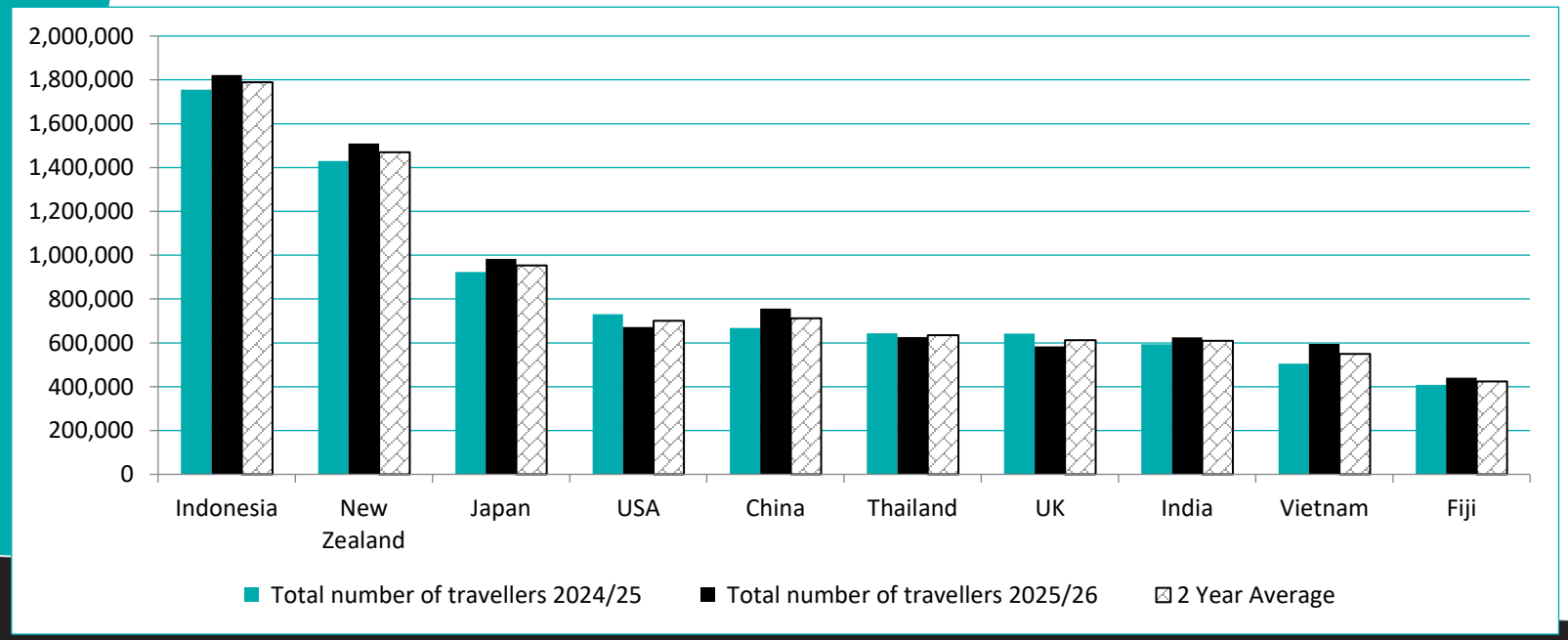
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Yearly – Australian outbound destinations.

Sep YE 25 v Sep YE 26

This section displays the performance of the major destinations Australians are travelling to as of September Year end 2025 and 2026.

	Total number of travellers 2024/25	Total number of travellers 2025/26	Change on previous year	2025/256 Performance
Indonesia	1,755,290	1,822,190	3.8%	Positive
New Zealand	1,429,410	1,509,880	5.6%	Positive
Japan	923,200	983,510	6.5%	Positive
USA	730,290	672,030	-8.0%	Negative
China	667,920	756,830	13.3%	Positive
Thailand	643,720	626,320	-2.7%	Negative
UK	641,740	583,060	-9.1%	Negative
India	593,260	624,960	5.3%	Positive
Vietnam	504,940	595,260	17.9%	Positive
Fiji	408,290	440,510	7.9%	Positive
National Total	**12,404,170**	**12,787,110**	**3.1%**	**Positive**



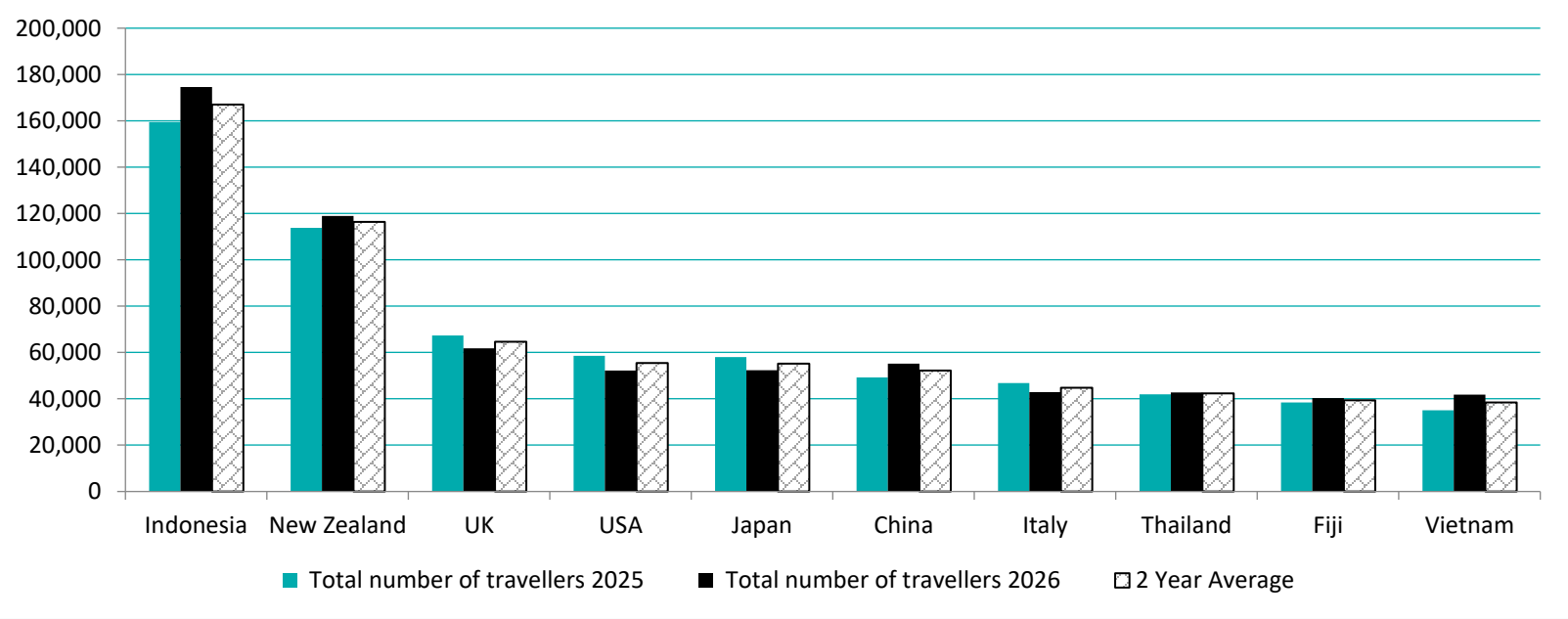
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Monthly – Australian outbound destinations.

Sept 25 v Sept 26

This section displays the performance of the major destinations Australians are travelling to, comparing Sept 2025 to Sept 2026.

	Total number of travellers Sept 25	Total number of travellers Sept 26	Change on previous year	2025/26 Performance
Indonesia	159,420	174,640	9.5%	Positive
New Zealand	113,870	119,000	4.5%	Positive
UK	67,330	61,840	-8.2%	Negative
USA	58,610	52,250	-10.9%	Negative
Japan	58,090	52,360	-9.9%	Negative
China	49,240	55,200	12.1%	Positive
Italy	46,810	42,870	-8.4%	Negative
Thailand	41,950	42,700	1.8%	Neutral
Fiji	38,370	40,270	5.0%	Positive
Vietnam	35,040	41,810	19.3%	Positive
National Total	**1,050,110**	**1,066,100**	**1.5%**	**Neutral**

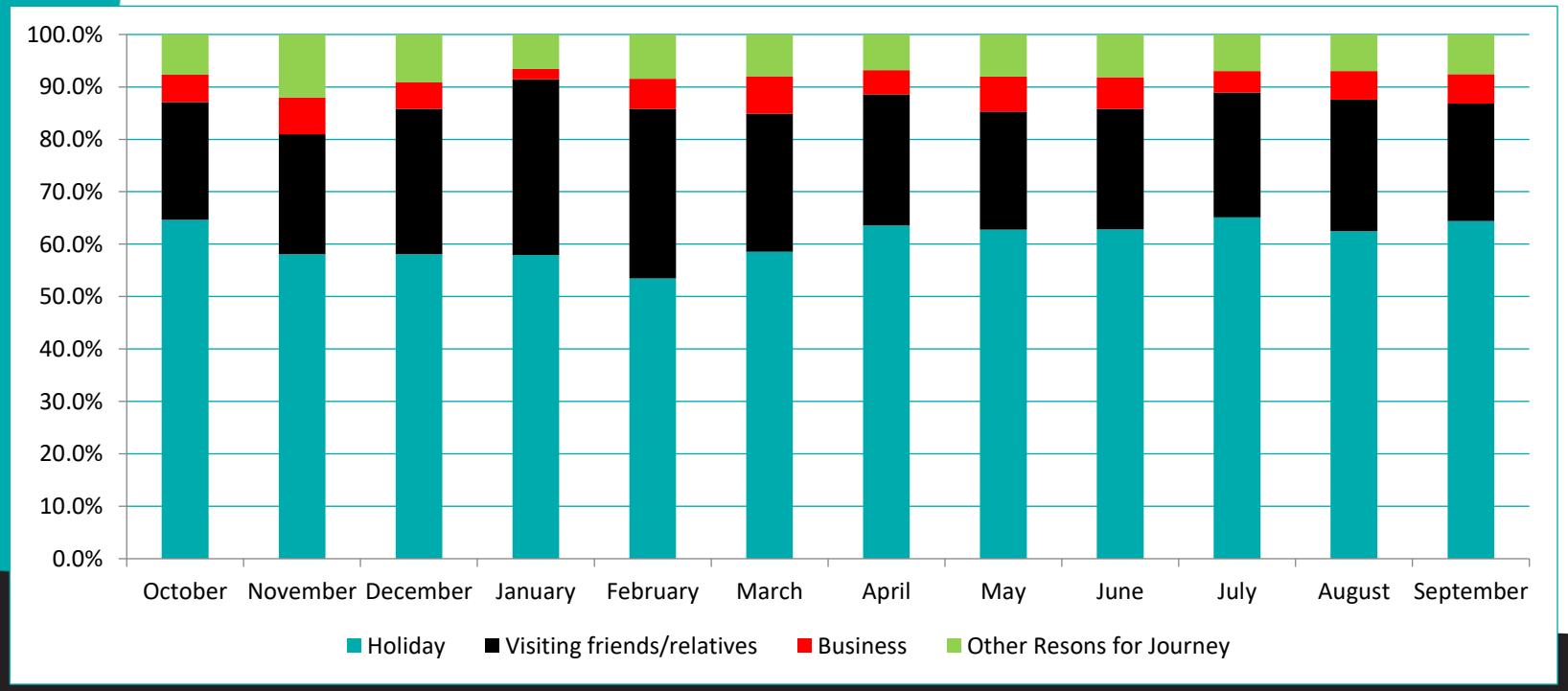


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Reasons to travel to popular international destinations by Australians

This section displays the reason for travel monthly up to YE September 2026.

	Holiday	Visiting friends/relatives	Business	Other Resons for Journey
October	64.6%	22.5%	5.2%	7.7%
November	58.1%	22.9%	7.0%	12.0%
December	58.1%	27.7%	5.1%	9.1%
January	57.9%	33.5%	2.0%	6.5%
February	53.4%	32.4%	5.7%	8.4%
March	58.6%	26.3%	7.1%	8.0%
April	63.6%	25.0%	4.7%	6.8%
May	62.8%	22.5%	6.6%	8.1%
June	62.8%	23.0%	6.0%	8.2%
July	65.1%	23.8%	4.1%	7.0%
August	62.5%	25.1%	5.4%	7.0%
September	64.4%	22.4%	5.6%	7.6%



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International Airline Market Share

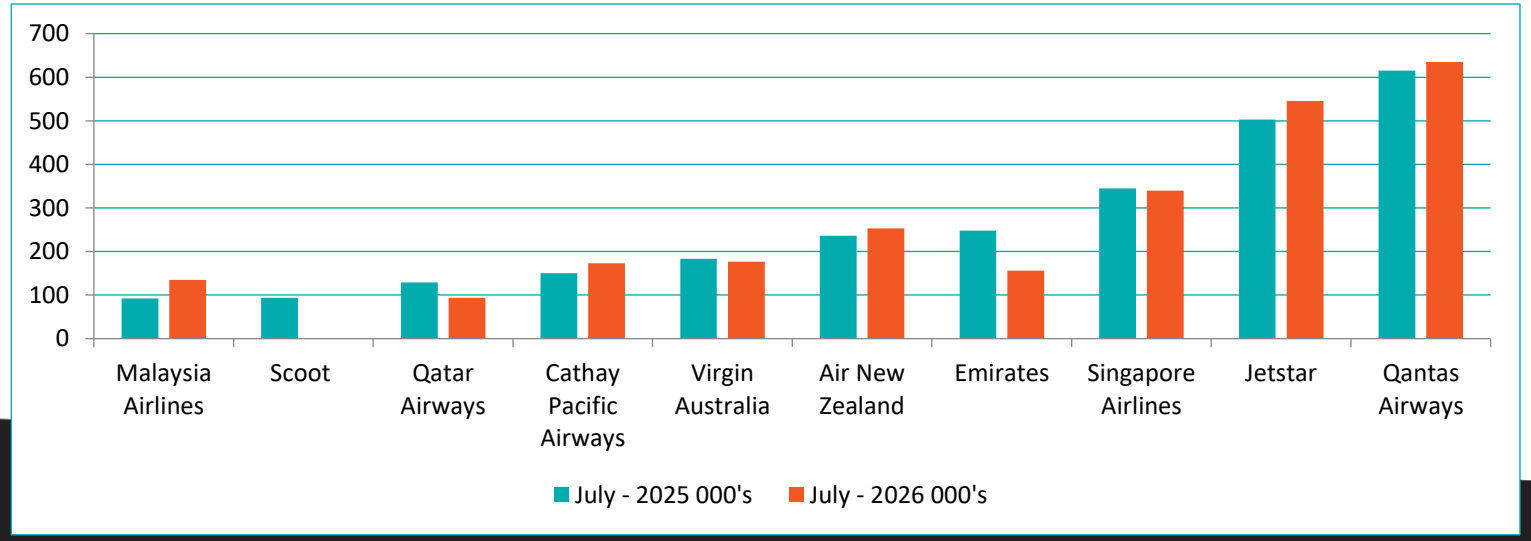
Airline share of passengers.

YE 25 v YE 26

This snapshot displays the market share of the top ten airlines for international travel for year end July 2026 compared to the same year end July 2025.

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 2024/2025 passengers carried 000's	YE 2024/2025 Market Share	YE 2025/2026 passengers carried 000's	YE 2025/2026 Market Share
Malaysia Airlines	92	2.4%	135	3.5%
Scoot	94	2.4%	0	0.0%
Qatar Airways	129	3.3%	94	2.4%
Cathay Pacific Airways	150	3.8%	173	4.5%
Virgin Australia	183	4.7%	177	4.6%
Air New Zealand	236	6.1%	253	6.5%
Emirates	248	6.4%	156	4.0%
Singapore Airlines	345	8.9%	340	8.8%
Jetstar	503	12.9%	545	14.1%
Qantas Airways	615	15.8%	635	16.4%
Others	1,300	33.4%	1,365	35.2%
All Airline Total	3,896		3,873	



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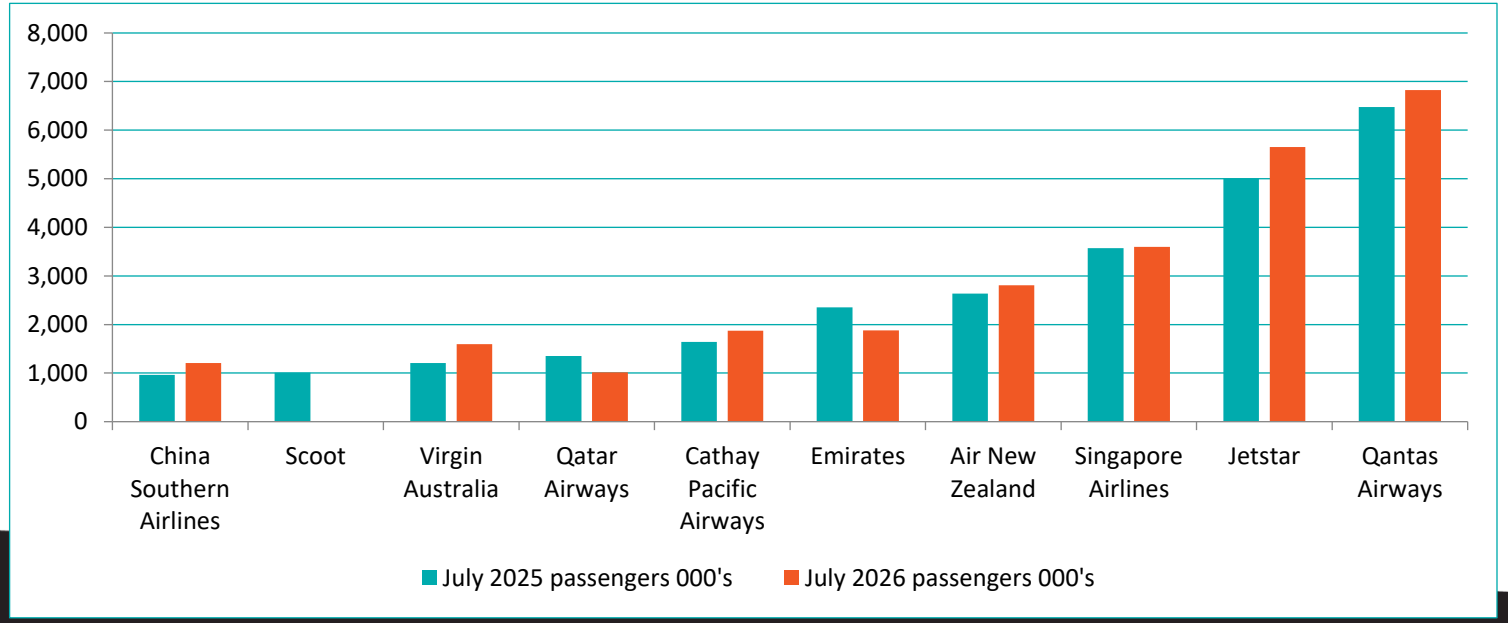
Airline share of passengers. July 2025 v July 2026

ME 25 v ME 26

This snapshot displays the market share of the top ten airlines for international travel for the month of July 2025 compared to July 2026.

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	July 2025 passengers carried 000's	July 2025 Market Share	July 2026 passengers carried 000's	July 2026 Market Share
China Southern Airlines	966	2.4%	1,207	2.9%
Scoot	1,006	2.5%	0	0.0%
Virgin Australia	1,207	3.0%	1,598	3.8%
Qatar Airways	1,352	3.4%	1,017	2.4%
Cathay Pacific Airways	1,639	4.1%	1,870	4.5%
Emirates	2,355	5.9%	1,881	4.5%
Air New Zealand	2,635	6.6%	2,805	6.7%
Singapore Airlines	3,573	9.0%	3,596	8.6%
Jetstar	5,007	12.6%	5,655	13.5%
Qantas Airways	6,476	16.3%	6,824	16.3%



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Domestic Airline Market activity

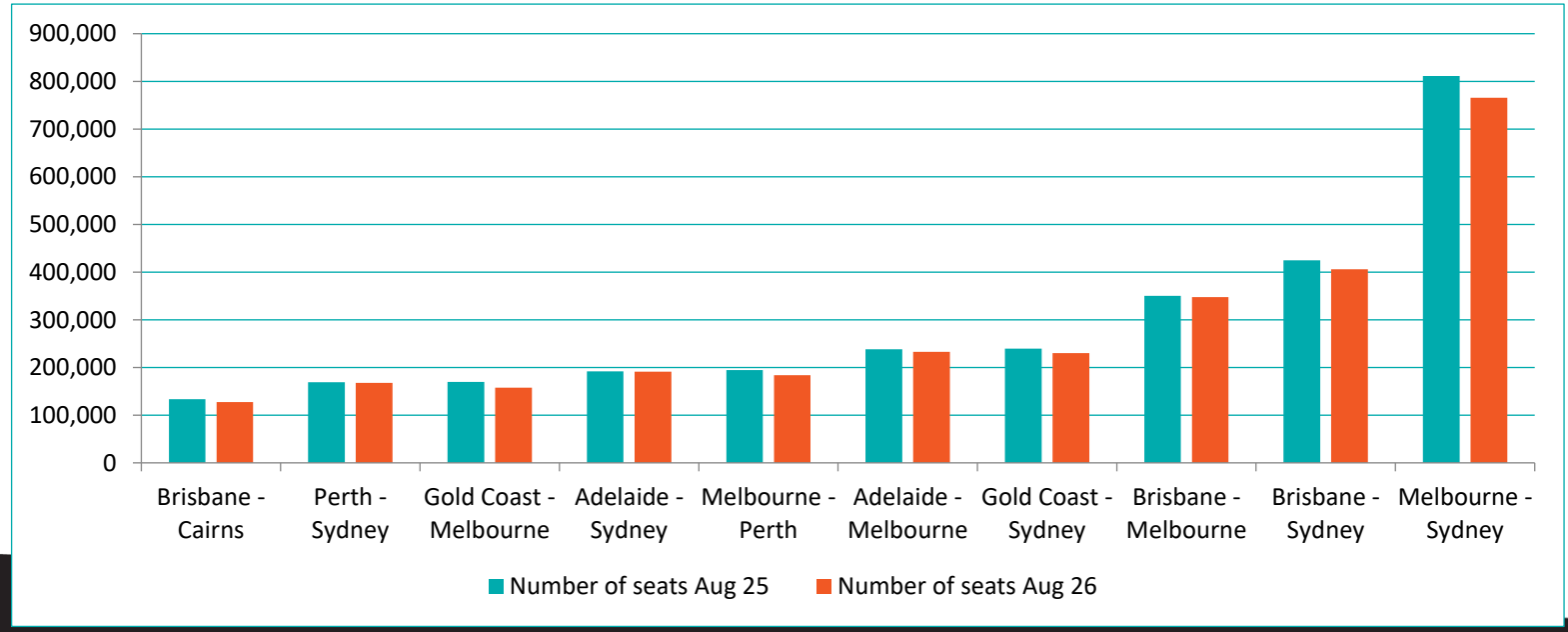
Airline share of passengers.

August 25 v August 26

This snapshot displays the market share of the top ten airlines for domestic travel for month end August 2026 compared to the same month end August 2025.

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 August 2025	Number of Seats August 2026	Number of seats % Change 25 V 26	Load factors 25 (%)	Load Factors 26 (%)
Brisbane - Cairns	133,192	127,178	-4.5	89.0	91.0
Perth - Sydney	169,109	167,448	-1	78.0	82.0
Gold Coast - Melbourne	169,516	157,777	-6.9	93.0	94.0
Adelaide - Sydney	191,663	191,496	-0.1	76.0	77.0
Melbourne - Perth	194,844	183,691	-5.7	83.0	88.0
Adelaide - Melbourne	238,067	232,635	-2.3	82.0	83.0
Gold Coast - Sydney	239,592	229,967	-4	89.0	90.0
Brisbane - Melbourne	350,584	347,308	-0.9	87.0	90.0
Brisbane - Sydney	424,474	406,216	-4.3	86.0	89.0
Melbourne - Sydney	811,193	765,370	-5.6	84.0	87.0



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