

Release: ABS Overseas Arrivals and Departures (ABS Cat No 3401.0)

International Visitor Arrivals to Australia in March 2009:

Short term international visitor arrivals to Australia declined in March 2009, down 4.9 per cent (year-on-year) to 488,600 arrivals. The shift in the timing of Easter, from March in 2008 to April in 2009, is likely to have contributed to this fall. In contrast to this original year-on-year result, short term international visitor arrivals increased in monthly trend terms in March 2009, up 0.9 per cent, compared to February 2009. In seasonally adjusted terms, visitor arrivals were 1.0 per cent lower in March 09, compared to February 2009.

Arrivals from most of Australia's top 10 markets declined in March, with the exceptions being Malaysia (up 40.1 per cent) and China (up 15.2 per cent). In terms of Australia's top 10 markets, the largest declines were: Japan down 17.2 per cent; the United Kingdom down 16.4 per cent; and Hong Kong down 19.9 per cent.

Consistent with individual market results, arrivals from North East Asia, North West Europe and the Americas declined in March, while arrivals from the Middle East increased strongly (up 16.9 per cent).

Arrivals for all purpose sectors fell in March except *education* (up 8.1 per cent) which appears to continue to benefit from improved price competitiveness. Purpose sectors most sensitive to income, confidence and economic stability, *holiday* and *business*, continue to show weakness down 7.4 per cent and 3.9 per cent, respectively.

Inbound – March quarter 2009 (January to March 2009)

Short term international visitor arrivals to Australia in the March quarter 2009 were down 3.5 per cent (year-on-year) to 1.45 million arrivals. The main markets which have declined include South Korea down 22.5 per cent; Japan down 22.3 per cent; the United Kingdom down 8.7 per cent; and the United States down 7.0 per cent.

Inbound - financial year to date (July 2008 to March 2009)

International visitor arrivals to Australia have decreased 2.2 per cent to 4.3 million visitors. In original terms, the main inbound markets to decline include: Japan down 21.8 per cent; South Korea down 17.5 per cent; the United Kingdom down 5.9 per cent; Hong Kong down 2.8 per cent; and the United States down 2.5 per cent. Main markets which have increased include India up 15.2 per cent; and France up 14.9 per cent.

Consistent with the monthly purpose results, *holiday* and *business* visitation declined 6.6 per cent and 6.3 per cent, respectively.

Short-term Australian Resident Departures in March 2009

Outbound travel has continued to slow and the ongoing switch to short haul travel is clearly evident as a lower Australian dollar and deteriorating domestic economy continues to impact on Australian's travel destination choices. There were 430,100 departures from Australia during March 2009, a decrease of 6.3 per cent compared to March 2008, with the shift in the timing of Easter, from March in 2008 to April in 2009, likely to have contributed to this fall.

The fall in departures was less pronounced in seasonally adjusted and trend terms, down 2.5 per cent and 0.5 per cent, respectively, compared to February 2009.

Short term resident departures to most of Australia's top 10 destinations fell in March 2009, with the exceptions being short and medium haul

destinations such as Indonesia, up 21.4 per cent, and Malaysia, up 0.6 per cent.

Demand for leisure markets such as Fiji (down 28.2 per cent) and Thailand (down 19.2 per cent) continues to wane, likely driven by both political instability and the effect of the economic climate. Similar to the inbound sector, the effect of the slowing Australian economy is clearly impacting on demand with the *business* and *holiday* sectors down 10.1 per cent and 7.8 per cent, respectively (in March 2009).

Outbound – March quarter 2009 (January to March 2009)

Short term Australian resident departures in the March quarter were 3.2 per cent lower than in the March quarter 2008, at 1.2 million.

Outbound - financial year to date (July 2008 to March 2009)

Growth in short term Australian resident departures continues to slow with departures increasing just 1.6 per cent to 4.3 million for the nine months to March 2009.

Table 1: International visitor arrivals

	Change on previous period ¹			International arrivals ¹		
	Mar 09	FYTD ² 2008-09	2008	Mar 09	FYTD ² 2008-09	2008
	(%)	(%)	(%)	(000s)	(000s)	(000s)
Top ten (2008)						
New Zealand	-2.6	-1.1	-2.2	81.5	829.8	1,113.4
United Kingdom	-16.4	-5.9	-2.5	71.6	544.6	672.0
Japan	-17.2	-21.8	-20.2	42.0	337.9	457.3
United States	-2.6	-2.5	-1.1	40.9	346.0	454.5
China	15.2	-1.4	-0.3	34.2	294.2	356.5
Singapore	-7.2	2.1	2.7	23.2	202.4	270.8
South Korea	-7.1	-17.5	-13.8	15.8	153.5	218.3
Malaysia	40.1	9.9	7.3	19.9	138.1	171.1
Germany	-8.1	2.9	6.1	14.8	133.8	160.7
Hong Kong	-15.5	-2.8	-2.0	13.1	111.9	143.9
Other Asia						
Indonesia	-13.8	-1.0	5.9	6.9	72.4	94.4
Thailand	-3.7	-8.3	-3.9	7.8	55.0	79.7
India	8.2	15.2	22.0	10.6	85.5	116.0
Other Europe						
France	10.0	14.9	16.5	6.6	72.6	85.6
Ireland	-14.5	-3.2	1.5	6.5	54.5	68.2
Netherlands	-10.9	0.0	6.8	4.1	44.7	54.7
Switzerland	-12.8	-7.3	-4.5	3.4	33.1	39.9
Italy	16.7	14.4	9.7	3.5	50.9	58.7
Other						
Canada	-4.0	1.5	8.7	12.1	100.1	124.6
South Africa	-26.7	1.0	8.0	5.5	51.1	68.5
Regions						
South East Asia	3.1	3.6	4.7	66.5	544.1	714.5
North East Asia	-5.1	-12.3	-11.9	113.3	966.1	1,257.7
North West Europe	-13.2	-2.9	0.6	117.8	983.2	1,201.9
South & East Europe	1.0	12.6	12.6	10.4	132.8	157.2
Middle East	16.9	13.6	14.5	8.3	83.7	100.3
Americas	-1.2	0.6	2.5	59.0	502.0	644.4
Purpose						
Holiday	-7.4	-6.6	-6.1	231.3	2,059.1	2,654.7
Visiting friends/relatives	-2.1	3.5	3.6	116.5	974.2	1,222.7
Business	-3.9	-6.3	0.6	57.4	464.7	654.2
Education	8.1	6.5	4.9	29.2	281.0	315.7
Convention/conference	-23.0	-4.8	0.2	11.7	136.1	188.3
Employment	-3.9	0.2	6.8	14.9	139.0	181.0
Total	-4.9	-2.2	-1.0	488.6	4,345.6	5,585.7

Source: ABS Overseas Arrivals and Departures, March 2009 (ABS Cat No 3401.0)

Notes: (1) Original data; (2) Financial year to date (July 2008 to Mar 2009)

Upcoming major tourism statistical releases

• Australian Bureau of Statistics	Overseas Arrivals and Departures, April 2009	4 June 2009
• Tourism Research Australia	International Visitor Survey, March Quarter 2009	10 June 2009
• Tourism Research Australia	National Visitor Survey, March Quarter 2009	17 June 2009
• Australian Bureau of Statistics	Survey of Tourist Accommodation, March Quarter 2009	26 June 2009

Chart pack: Overseas Arrivals and Departures, March 2009

Arrivals

Figure 1: Total international visitor arrivals (000s), 2005 to 2009

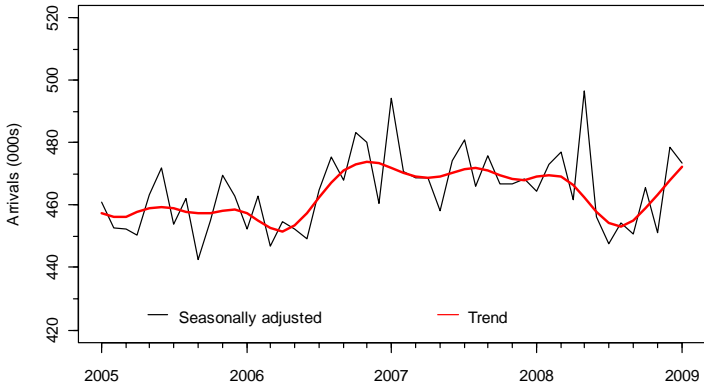


Figure 2: Change in international visitor arrivals (%), Mar 09 on Mar 08

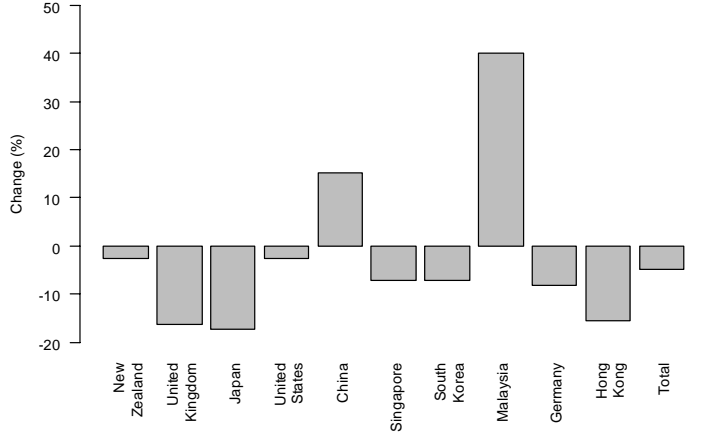


Figure 3: Change in international visitor arrivals (%), FYTD 2008-09

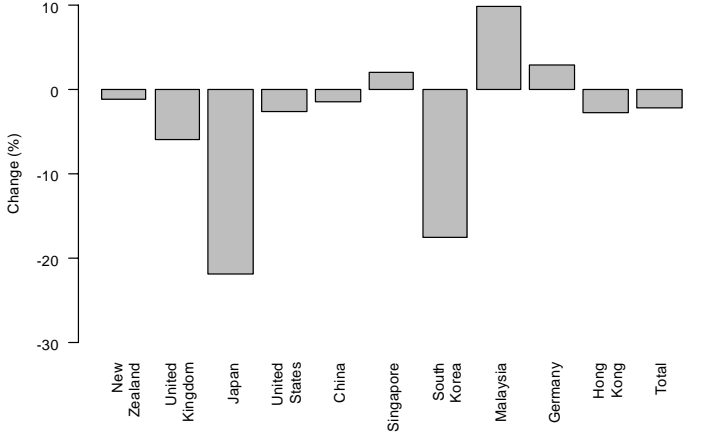
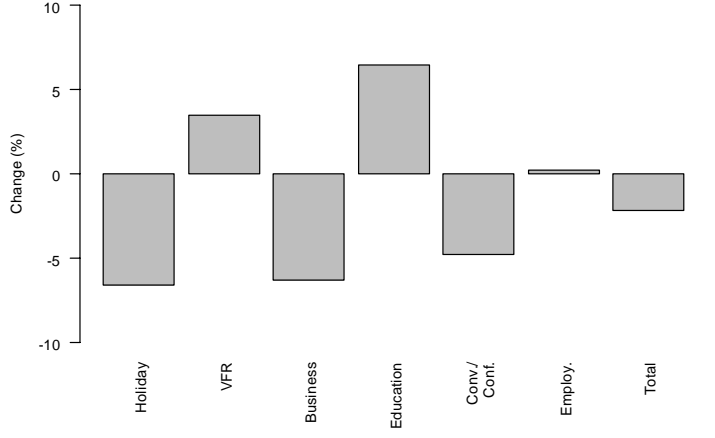


Figure 4: Change in international visitor arrivals by purpose (%), FYTD 2008-09



Departures

Figure 5: Total short-term resident departures (000s), 2005 to 2009

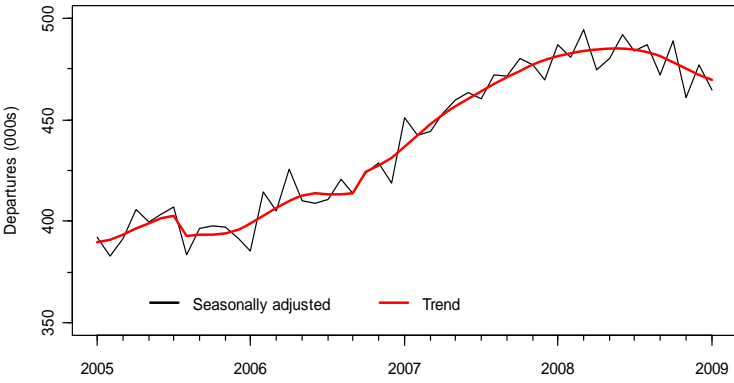


Figure 6: Change in short-term resident departures (%), Mar 09 on Mar 08

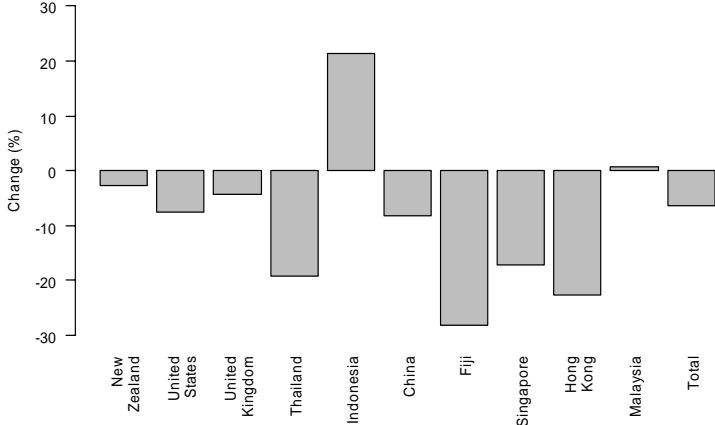


Figure 7: Change in short-term resident departures (%), FYTD 2008-09

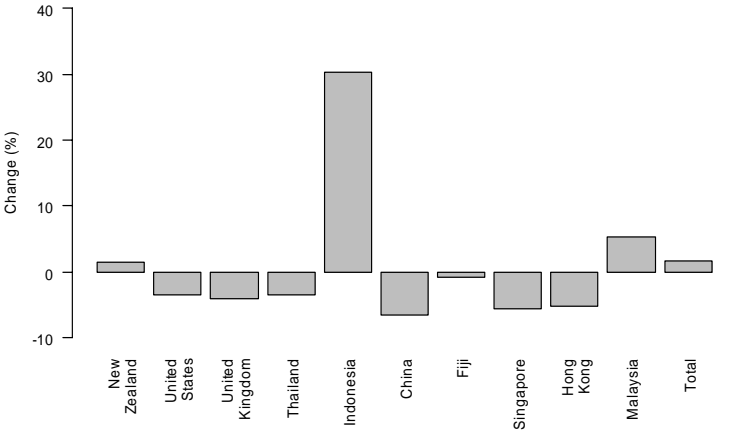


Figure 8: Change in short-term resident departures by purpose (%), FYTD 2008-09

