

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

International Visitor Arrivals to Australia in November 2009:

In original terms, visitor arrivals rose 2.5 per cent to 485,000 (compared to November 2008). Seasonally adjusted, visitor arrivals were down 1.7 per cent in November, while in trend terms, arrivals were up 1.1 per cent (compared to October 2009).

The increase in arrivals in November 2009 represents the third consecutive month of positive growth. The last time this occurred was the three month period ending in September 2007—the beginning of the Global Financial Crisis.

Arrivals from all of Australia's top ten markets, except Japan (down 23 per cent), were higher in November (compared to November 2008). The largest increases in arrivals came from Singapore (up 10.9 per cent), the United States (up 9.5 per cent) and Germany (up 9.3 per cent)—refer Table 1. Other notable increases in November include New Zealand, Australia's largest inbound market by volume, up 0.7 per cent, and South Korea, up 4.1 per cent—its first monthly increase since July 2008.

Consistent with individual market results, arrivals from all regions except North East Asia increased in November. The Middle East posted the strongest growth (up 15.7 per cent).

The (generally) higher yielding *education* purpose segment increased 17.3 per cent in November. Travel for the purpose of *visiting friends and relatives* increased 11.5 per cent. *Business* travel increased 2.2 per cent—its first increase since July 2008. *Holiday* travel fell 2.2 per cent.

Inbound – Calendar year to date (January to November 2009)

International visitors to Australia are down 0.8 per cent to 4.9 million (compared to the same period in 2008). The main inbound markets which have increased include Malaysia up 24.8 per cent; and Hong Kong up 9.9 per cent. The main inbound markets to decline included: Japan down 23.7 per cent; South Korea down 19.9 per cent; the United Kingdom down 1.3 per cent; and Germany down 0.6 per cent.

Consistent with the monthly purpose results, *visiting friends and relatives* travel and *education* travel are up 13.1 per cent and 11.9 per cent, respectively (compared with the same period in 2008). *Convention/conference* travel is down 24.4 per cent and *business* travel is 12.0 per cent lower.

Short-term Australian Resident Departures in November 2009:

Outbound travel continued to escalate in November, with short term resident departures increasing 20 per cent to 520,400.

In seasonally adjusted terms, departures decreased 1.2 per cent compared to October 2009. Trend estimates for all short-term resident departures series from April 2009 onwards continue to be temporarily suspended due to unusual influences in the original and seasonally adjusted departures data.

All of Australia's top ten markets for departures saw increases in November, compared to November 2008.

Short-to-medium haul destinations continued to dominate outbound growth. Departures to Indonesia more than doubled, up 106 per cent (for the eleven months to November 2009, outbound departures to Indonesia are up 44 per cent).

Other short-to-medium haul destinations which recorded increases in November were Singapore (up 30 per cent), Malaysia (up 28 per cent), and the region of South-East Asia as a whole (up 35 per cent).

Departures to the United States also grew strongly, up 36 per cent compared to November 2008. The strong growth in departures to the United States is likely a reflection of the strengthening of the Australian dollar, which began in March 2009, and increased competition/capacity on the Pacific aviation route.

By purpose, leisure travel increased significantly (*holiday* up 30 per cent, and *visiting friends and relatives* travel up 26 per cent). *Education* travel increased by 10.5 per cent; *business* travel was up 4.2 per cent. Travel for the purpose of attending a *convention or conference* fell by 15.0 per cent.

Outbound – Calendar year to date (January to November 2009)

Short term Australian resident departures increased 7.5 per cent to 5.6 million. Outbound travel continues to exceed inbound travel by over 10 per cent (5.6 million departures versus 4.9 million arrivals).

Table 1: International visitor arrivals

	Change on previous period ¹			International arrivals ¹		
	Nov 09 (%)	CYTD ² 2009 (%)	2008-09 (%)	Nov 09 (000s)	CYTD ² 2009 (000s)	2008-09 (000s)
Top ten (2008-09)						
New Zealand	0.7	-0.2	-1.4	90.8	1010.8	1105.5
United Kingdom	4.9	-1.3	-4.0	64.2	563.9	658.5
United States	9.5	4.1	-0.6	43.6	426.9	451.6
Japan	-23.0	-23.7	-22.5	29.8	320.4	403.6
China	7.9	3.2	-4.5	31.4	335.3	358.2
Singapore	10.9	5.2	4.5	30.5	247.5	278.4
Malaysia	2.7	24.8	17.5	19.1	186.9	195.1
South Korea	4.1	-19.9	-18.2	15.2	162.1	193.2
Germany	9.3	-0.6	2.5	15.3	140.9	158.9
Hong Kong	7.1	9.9	2.2	10.5	140.0	149.9
Other Asia						
Indonesia	26.8	13.0	2.9	7.1	93.0	95.9
Thailand	8.3	0.7	-8.1	5.2	73.7	77.5
India	-1.0	6.9	11.9	9.8	112.2	120.5
Other Europe						
France	23.0	7.5	14.8	9.1	81.7	89.4
Ireland	-16.4	-7.0	-2.6	4.6	54.3	67.3
Netherlands	-5.6	-6.2	-1.5	5.1	44.2	52.3
Switzerland	2.5	4.1	-4.6	4.1	35.8	39.8
Italy	14.3	-9.9	11.7	4.8	46.2	59.0
Other						
Canada	-9.2	-2.4	0.3	10.8	107.3	121.3
South Africa	-7.0	-12.8	-2.1	5.3	49.8	64.4
Regions						
South East Asia	10.6	9.9	6.7	70.7	692.3	747.7
North East Asia	-5.4	-8.4	-12.1	93.5	1052.4	1202.2
North West Europe	5.4	-1.0	-1.8	114.6	1020.4	1182.5
South & East Europe	5.2	-10.3	9.0	14.2	122.4	154.5
Middle East	15.7	2.1	13.7	8.1	92.3	105.3
Americas	5.1	2.6	1.5	59.4	592.6	642.2
Purpose						
Holiday	-2.2	-2.8	-5.5	230.6	2269.8	2603.9
Visiting friends/relatives	11.5	13.1	6.8	121.3	1163.9	1283.2
Business	2.2	-12.0	-9.9	59.3	544.9	599.2
Education	17.3	11.9	8.8	16.3	338.5	338.2
Convention/conference	10.1	-24.4	-9.5	15.2	136.1	166.8
Employment	-6.7	-3.5	-1.0	14.0	159.0	178.4
Total	2.5	-0.8	-1.6	485.0	4935.8	5540.9

Source: ABS Overseas Arrivals and Departures, November 2009 (ABS Cat No 3401.0)
Notes: (1) Original data; (2) Calendar year to date (January 2009 to November 2009)

Upcoming major tourism statistical releases

- Australian Bureau of Statistics
- Australian Bureau of Statistics
- Tourism Research Australia
- Tourism Research Australia

- Overseas Arrivals and Departures, December 2009
- Overseas Arrivals and Departures, January 2010
- International Visitor Survey, December quarter 2009
- National Visitor Survey, December quarter 2009

- 8 February 2010
- 5 March 2010
- 10 March 2010
- 17 March 2010

Chart pack: Overseas Arrivals and Departures, November 2009

Arrivals

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

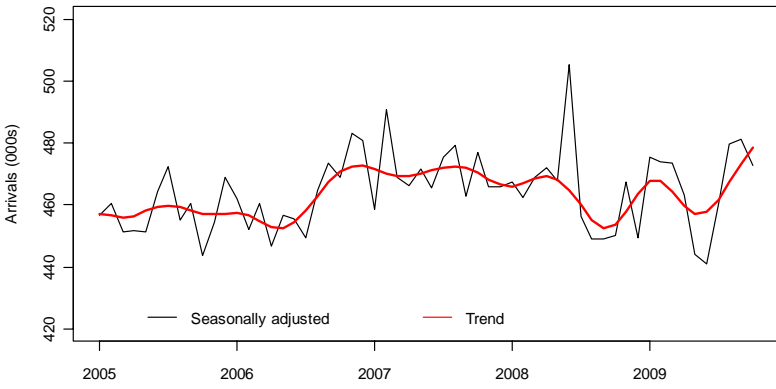


Figure 2: Change in international visitor arrivals (%), November 09 on November 08

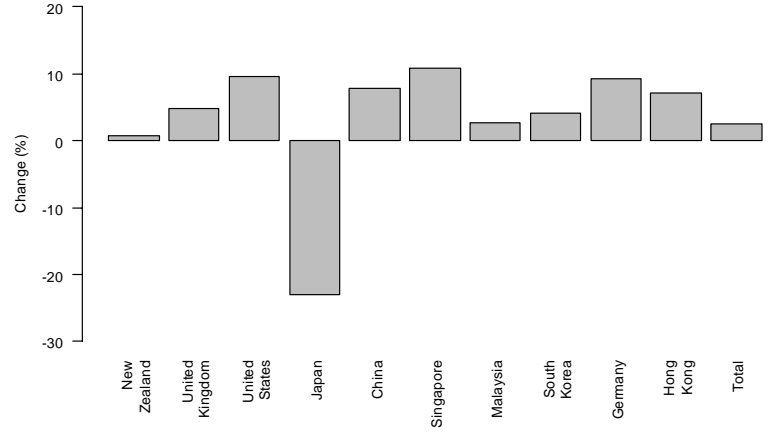


Figure 3: Change in international visitor arrivals (%), CYTD 2009

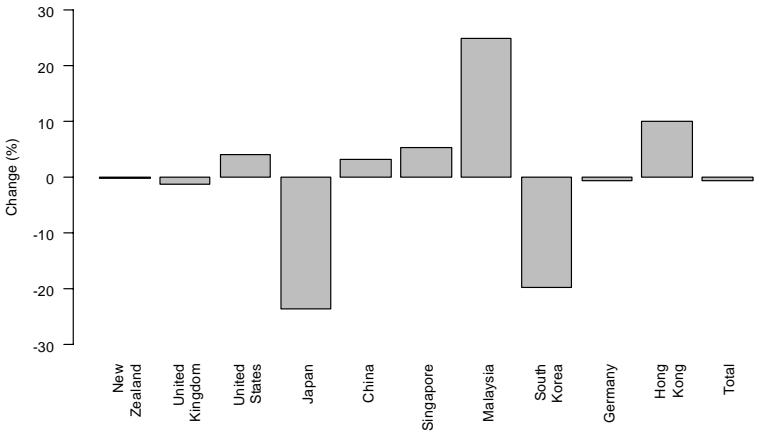
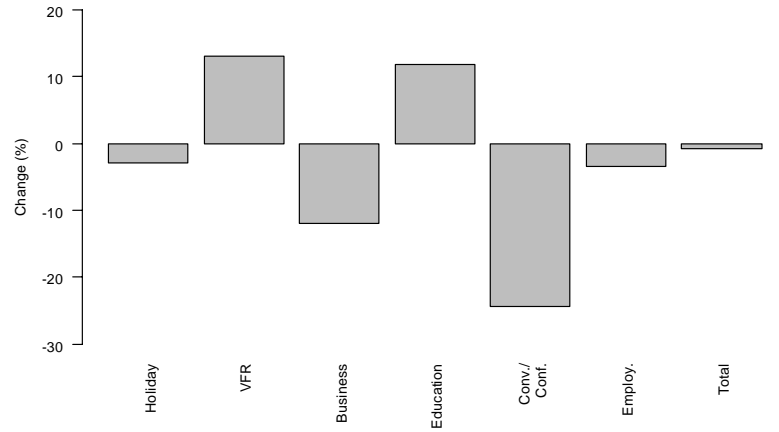


Figure 4: Change in international visitor arrivals by purpose (%), CYTD 2009



Departures

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

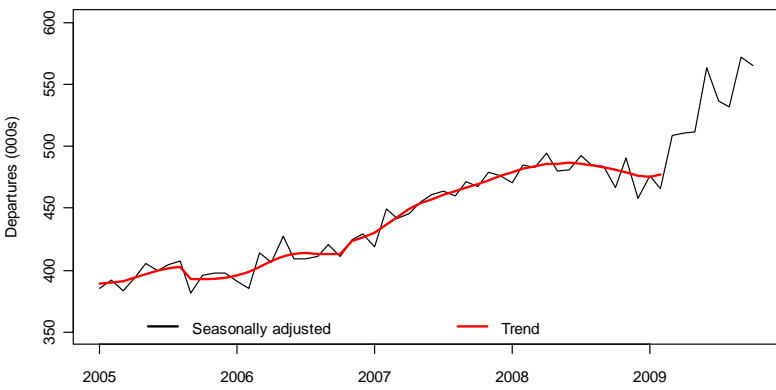


Figure 6: Change in short-term resident departures (%), November 09 on November 08

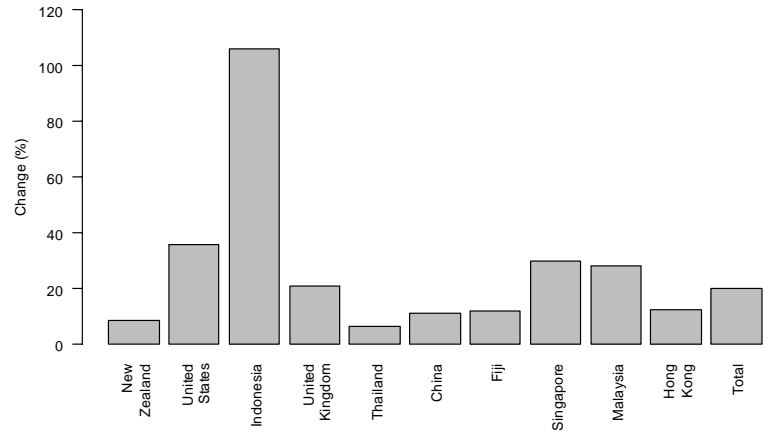


Figure 7: Change in short-term resident departures (%), CYTD 2009

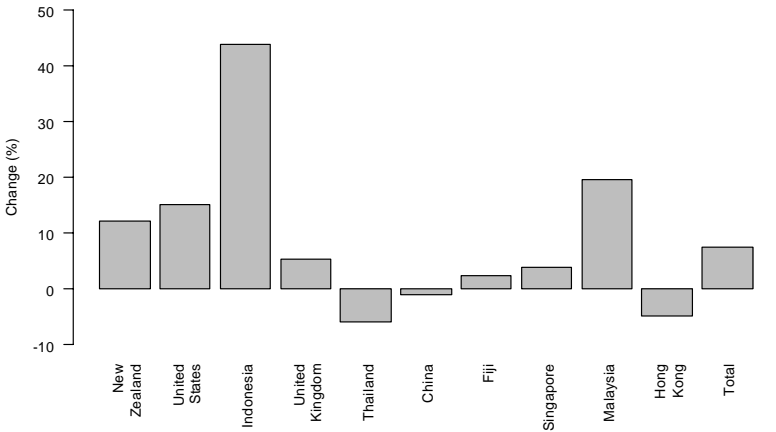


Figure 8: Change in short-term resident departures by purpose (%), CYTD 2009

