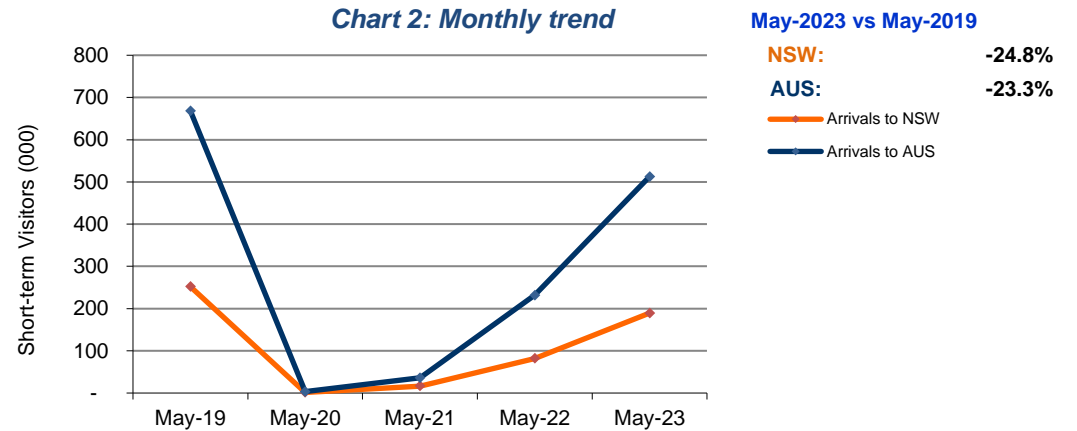
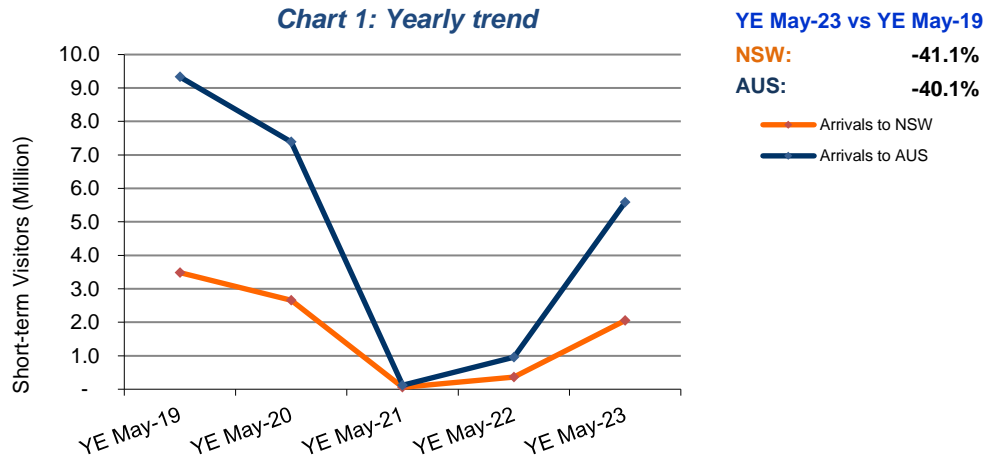


Overseas Arrivals Trend

Source: Australian Bureau of Statistics

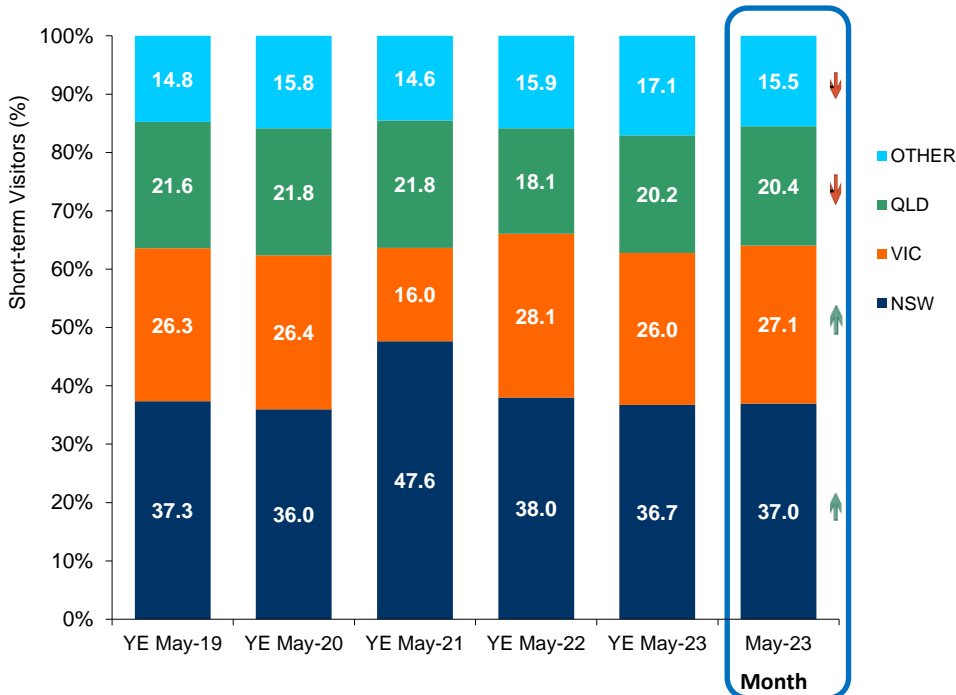
MAY 2023

Short-term International Visitor Arrivals to NSW vs. Australia



Note: YE means 'year ended' and contains 12 months of data.

Chart 3: Short-term International Visitor Arrivals to Australia: Market Share by state of Arrival



How has international visitor movement changed?

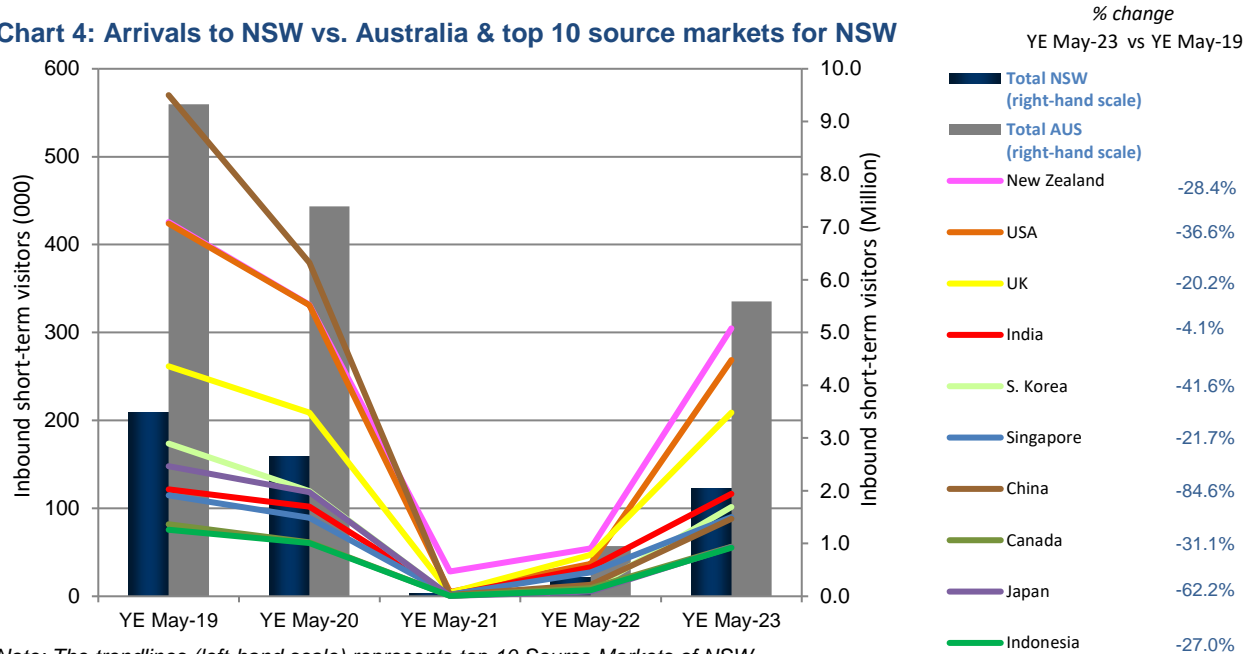
International visitation to Australia is progressively recovering, but still lower than the pre-pandemic (2019) level. In February 2022, the Australian government reopened its border to all vaccinated travellers. However, the key Covid restrictions were lifted later in July 2022 (Australian and New Zealand borders were open to all travellers regardless of their vaccination status) and October 2022 (all Covid isolation requirements were ended nationwide).

In the year ended (YE) May 2023, international short-term visitor arrivals to NSW decreased by 41.1 per cent (Chart 1) when compared to YE May 2019 (pre-pandemic). Meanwhile, in the month of May 2023 (Chart 2), NSW received 189,420 short-term visitor arrivals, still down 24.8 per cent when compared to May 2019. In contrast, both yearly and monthly arrivals saw a considerable increase when compared with the same periods in 2022 respectively.

NSW maintains its lead in share of Australia, attracting 36.7 per cent of international visitors (Chart 3) in the YE May 2023, which was 1.3 percentage points lower than the same period prior year.

For the month of May 2023, NSW received 37.0 per cent of international visitors, 1.6 percentage points more than May 2022. Victoria's share increased by a marginal 0.5 percentage point, while Queensland's market share decreased by 0.2 percentage points this month.

Chart 4: Arrivals to NSW vs. Australia & top 10 source markets for NSW



Note: The trendlines (left-hand scale) represents top 10 Source Markets of NSW.

Where are they from?

Australia:

As of YE May 2023 (Chart 4), Australia received 5.6 million international short-term visitor arrivals (down 40.1 per cent on YE May 2019).

The top 3 markets by numbers of arrivals to Australia as of YE May 2023 were New Zealand (1.0 million), the UK (567,530) and the USA (534,610).

NSW:

As of YE May 2023 (Chart 4), NSW received over 2.1 million international short-term visitors (down 41.1 per cent on YE May 2019). This figure represents the third lowest short-term visitor arrivals on record for YE May since 2008 (the lowest and second lowest were in 2021 and 2022), and only 59 per cent of pre-Covid arrivals (YE May 2019).

All top 5 source markets in YE May 2023 marked an increase of arrivals as compared to YE May 2022. New Zealand recorded the largest absolute increase, followed by the USA (Table 1).

The top 3 recovered source markets compared to YE May 2019 are India (-4.1%), the UK (-20.2%) and Singapore (-21.7%).

In the month of May 2023, NSW received 189,420 short-term visitor arrivals, recording an increase on May 2022 (but still only 75 per cent of May 2019). New Zealand provided the highest number of arrivals to NSW followed by the USA and China.

Table 1: Top 5 Source Markets for NSW: Arrivals

Year Ended May 2023					
Country of Origin	Rank	No. of Visitors	YE May-23 vs YE May-22	Share of NSW visitors	Share of AUS
New Zealand	1	304,700	+250,280	14.8%	29.5%
USA	2	268,850	+232,210	13.1%	50.3%
UK	3	208,830	+161,510	10.2%	36.8%
India	4	116,660	+83,520	5.7%	31.1%
S. Korea	5	101,410	+93,470	4.9%	65.0%
Top 5 source market TOTAL		1,000,450	+801,810	48.7%	
NSW		2,052,480	+1,690,290	-	36.7%

Note: Top 5 source market total is not necessarily made up of the same countries in the previous year/month.

Month of May 2023					
Country of Origin	Rank	No. of Visitors	May-23 vs May-22	Share of NSW visitors	Share of AUS
New Zealand	1	27,910	+13,420	14.7%	28.4%
USA	2	20,330	+11,190	10.7%	48.0%
China	3	15,440	+13,370	8.2%	47.9%
S. Korea	4	13,460	+11,400	7.1%	72.0%
India	5	12,670	+3,480	6.7%	30.7%
Top 5 source market TOTAL		89,810	+43,630	47.4%	
NSW		189,420	+107,430	-	37.0%