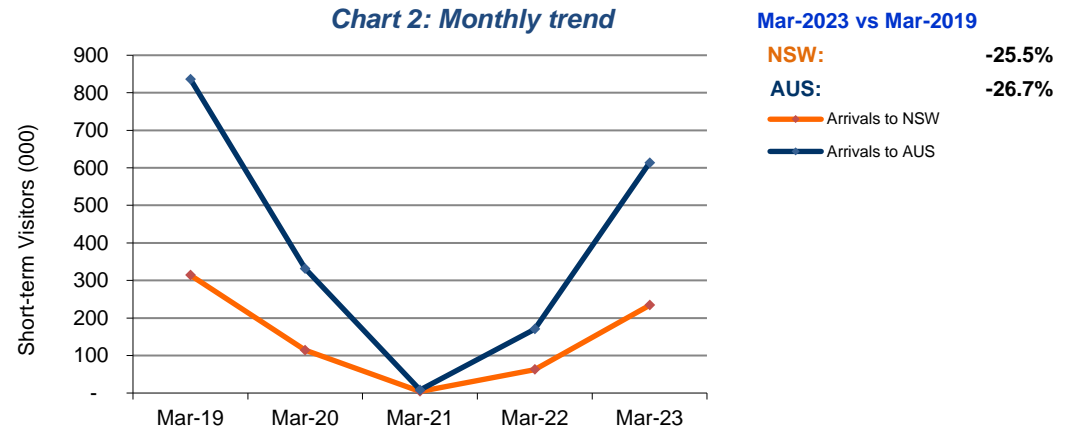
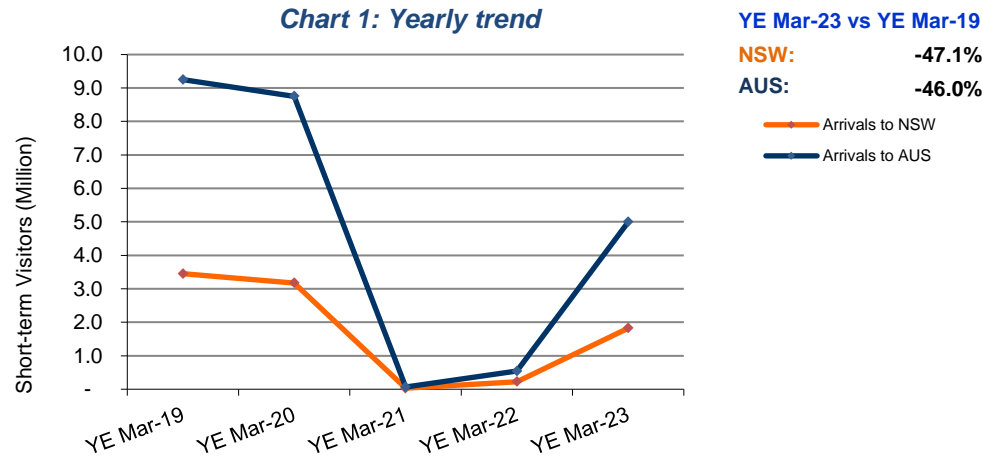


Overseas Arrivals Trend

Source: Australian Bureau of Statistics

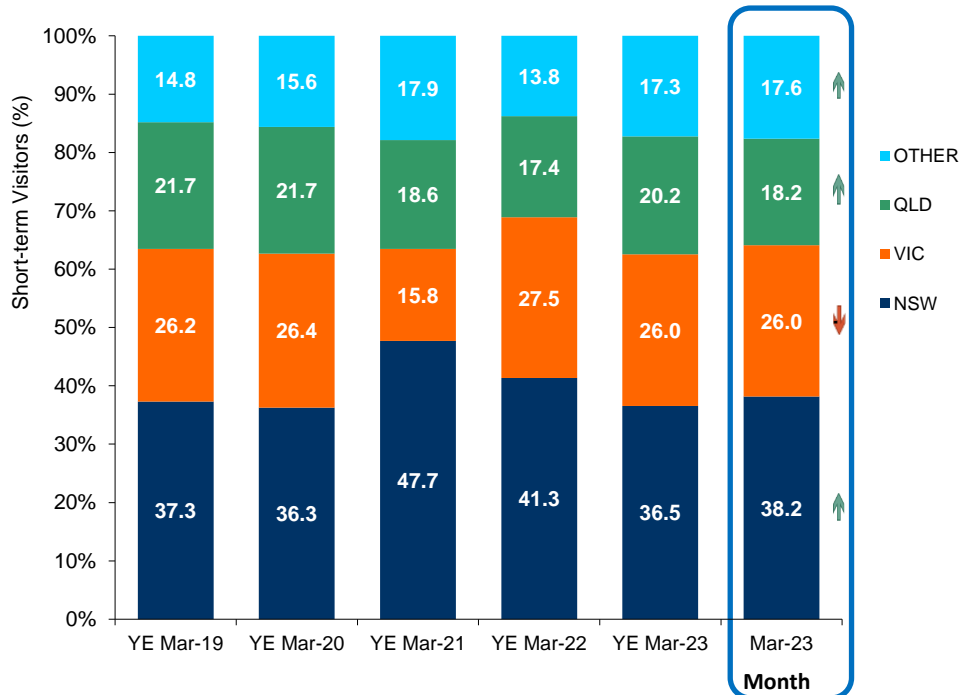
MARCH 2023

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?

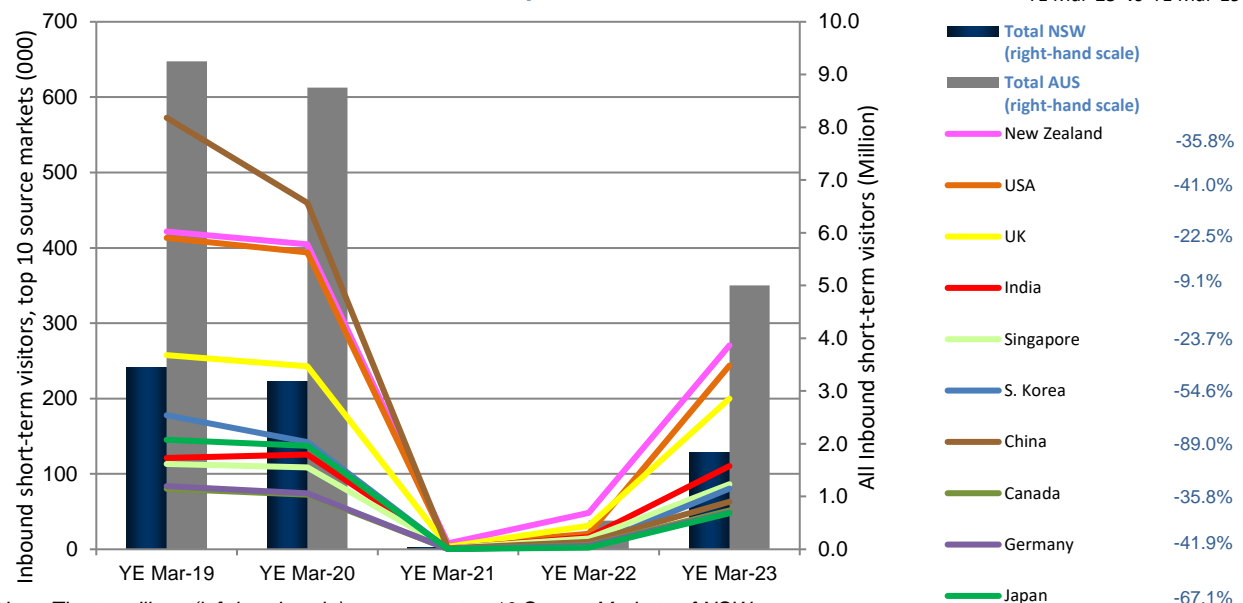
International visitation to Australia is progressively recovering, but still lower than the pre-pandemic (2019) level. Key Covid restrictions were lifted in July 2022 (Australian and New Zealand borders were open to all travellers regardless of their vaccination status) and October 2022 (all Covid isolation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

In the year ended (YE) March 2023, international short-term visitor arrivals to NSW decreased by 47.1 per cent (Chart 1) when compared to YE March 2019 (pre-pandemic). Meanwhile, in the month of March 2023 (Chart 2), NSW received 234,000 short-term visitor arrivals, still down 25.5 per cent when compared to March 2019. In contrast, both yearly and monthly arrivals saw a considerable increase when compared with same periods in 2022 respectively.

NSW maintains its lead in share of Australia, attracting 36.5 per cent of international visitors (Chart 3) in the YE March 2023, which was 4.8 percentage points lower than the prior year.

For the month of March 2023, NSW received 38.2 per cent of international visitors, 1.4 percentage points more than March 2022. Victoria's share decreased by 2 percentage points, while Queensland's market share remained the same 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:

In the **YE March 2023** (Chart 4), Australia received 5.0 million international short-term visitor arrivals (down 46.0 per cent on YE March 2019). As the closure of Australia's international border remained in force until late February 2022, arrivals to Australia continued to be impacted in YE March 2023.

The top three markets for Australia by YE March 2023 were New Zealand, the UK and the USA.

NSW:

In the **YE March 2023** (Chart 4), NSW received 1.8 million international short-term visitors (down 47.1 per cent on YE March 2019). This number represents the third lowest volume of short-term visitor arrivals on record (since 2008) for YE March (the lowest number of arrivals was recorded in 2021). This year, NSW received only 53 per cent of its pre-Covid arrivals (YE March 2019).

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

Table 1: Top 5 Source Markets for NSW: Arrivals

Year Ended March 2023					
Country of Origin	Rank	No. of Visitors	YE Mar-23 vs YE Mar-22	Share of NSW visitors	Share of AUS
New Zealand	1	270,770	+222,660	14.8%	29.7%
USA	2	243,670	+223,120	13.3%	50.5%
UK	3	199,770	+168,520	10.9%	36.4%
India	4	110,310	+94,030	6.0%	30.9%
Singapore	5	86,420	+72,270	4.7%	25.8%
Top 5 source market TOTAL		910,940	+780,600	49.9%	
NSW		1,827,100	+1,601,750	-	36.5%

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

Month of March 2023					
Country of Origin	Rank	No. of Visitors	Mar-23 vs Mar-22	Share of NSW visitors	Share of AUS
USA	1	32,380	+25,410	13.8%	51.0%
New Zealand	2	29,280	+22,810	12.5%	30.6%
UK	3	27,610	+17,750	11.8%	37.6%
S. Korea	4	13,780	+12,560	5.9%	72.3%
India	5	12,370	+6,780	5.3%	31.9%
Top 5 source market TOTAL		115,420	+82,500	49.3%	
NSW		234,000	+171,390	-	38.2%

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

In the **month of March 2023**, NSW received 234,000 short-term visitor arrivals, recording an increase on the same month in the previous year (but down 25.5 per cent on March 2019). This month, the State received 75 per cent of March 2019 arrivals. The USA gained first place for the highest number of overseas arrivals to NSW followed by New Zealand and the UK.