

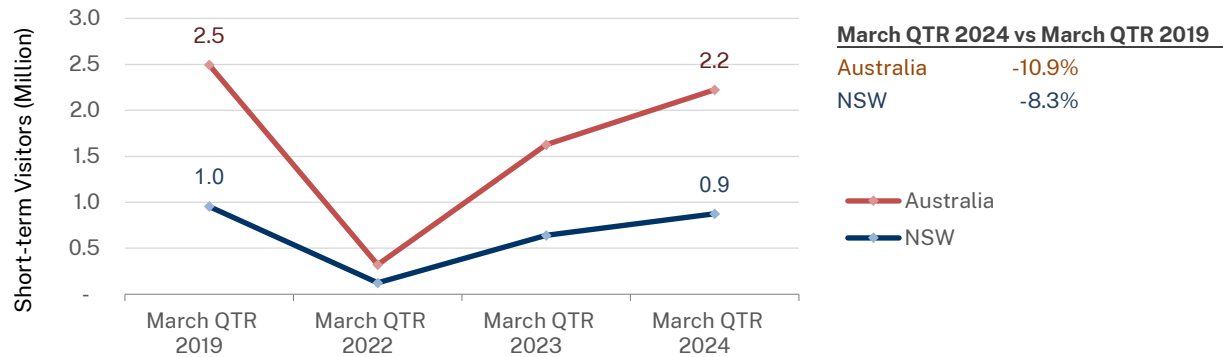
Overseas Arrivals and Departures Trend

March Quarter 2024

Source: Australian Bureau of Statistics (ABS)



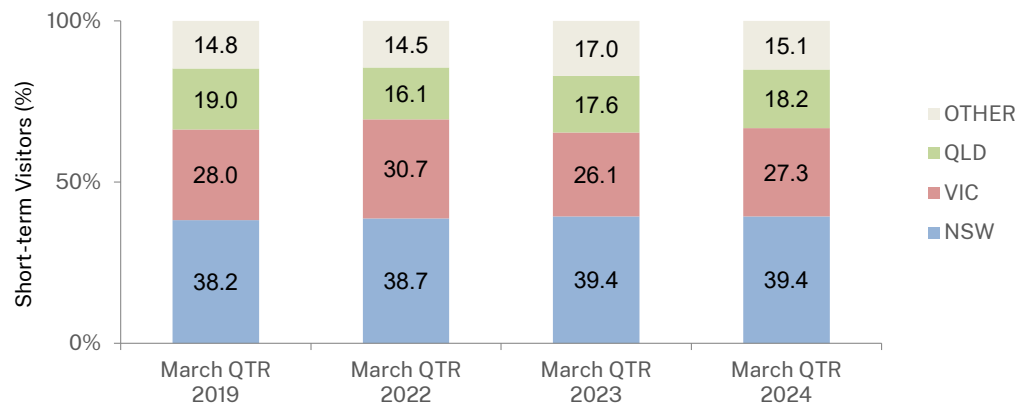
Chart 1: Short-term International Visitor Arrivals to NSW vs. Australia*



How has international visitor movement changed?

(Chart 1) International visitation to Australia is progressively recovering, but still lower than 2019 pre-pandemic levels. In **March quarter 2024**, international short-term visitor arrivals to NSW were 8.3 per cent below March quarter 2019 levels.

Chart 2: Short-term International Visitor Arrivals to Australia*: Market Share by State of Arrival



(Chart 2) NSW still maintains its leading position in share of Australia, attracting 39.4 per cent of international visitors in **March quarter 2024**, up 1.2 ppt from March quarter 2019. VIC and QLD experienced declines in their share of international visitors when comparing March quarter 2024 with 2019.

*Note: Data from 2020 and 2021 is omitted due to low arrival numbers

Overseas Arrivals and Departures Trend

March Quarter 2024

Source: Australian Bureau of Statistics (ABS)



Chart 3: Reason for journey to NSW

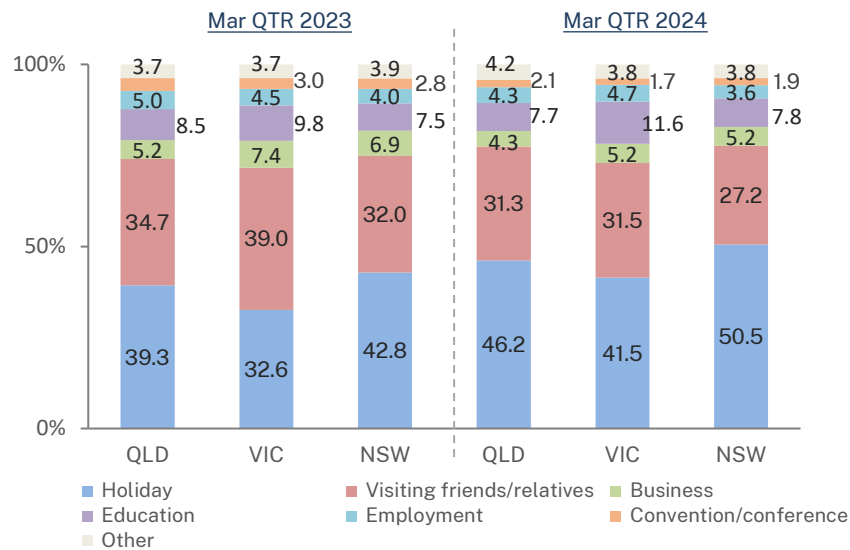


Table 1: Monthly arrivals to NSW

% share of total to NSW	Holiday	VFR	Total to NSW
Apr-23	41.8	38.0	200,230
May-23	39.8	33.0	189,420
Jun-23	42.9	34.6	203,410
Jul-23	43.5	28.0	233,530
Aug-23	47.3	29.0	230,460
Sep-23	44.7	30.9	220,760
Oct-23	44.5	30.4	235,230
Nov-23	46.5	31.0	255,670
Dec-23	46.3	41.2	351,760
Jan-24	49.3	27.5	240,650
Feb-24	51.5	24.0	352,320
Mar-24	50.2	30.8	282,310

What was the reason for their journey?

(Chart 3) In **March quarter 2024**, Holidaying was the most popular purpose of visit, for NSW, VIC and QLD. In March quarter 2023 this was also the case for NSW and QLD, but not for VIC (VFR).

Holiday visitors share increased across the three states with VIC recording the strongest increase (up 8.9 ppt), followed by NSW (up 7.7 ppt) and then QLD (up 6.9 ppt).

(Table 1) In the last 12 months, the visitor arrivals to NSW have fluctuated. December 2023 and February 2024 were the most popular months for all travelers.

December and February were the most popular months for **Holiday visitors**.

December and March were the most popular months for **VFR visitors**.

(Table 2) In **March quarter 2024**, the USA was the top source market for NSW. Over the past six years, the USA has been a consistent #1 or #2 source market for NSW. Arrivals from the NZ and the UK have consistently been among the top five as well. Arrivals from China declined during the Covid-19 period, but emerged as NSW's #2 source market in this quarter.

Table 2*: Arrivals to NSW, top five source markets

Rank	Mar QTR 2019		Mar QTR 2022		Mar QTR 2023		Mar QTR 2024	
1	China	184,160	UK, CIs & IOM	20,300	USA	96,500	USA	126,160
2	USA	129,440	USA	12,600	New Zealand	77,380	China	121,010
3	New Zealand	91,900	India	11,920	UK, CIs & IOM	77,190	New Zealand	101,120
4	UK, CIs & IOM	83,420	New Zealand	8,980	Korea, South	42,320	UK, CIs & IOM	84,460
5	Korea, South	54,100	Singapore	7,010	China	33,520	Korea, South	68,930

*Note: Data from 2020 and 2021 is omitted due to low arrival numbers

Overseas Departures

In **March quarter 2024**, there were 918,750 departures from NSW, which was 90% of 2019 departures. When compared with 2023, the number of departures rose by 286,810. The most popular destinations were: USA, New Zealand and China.