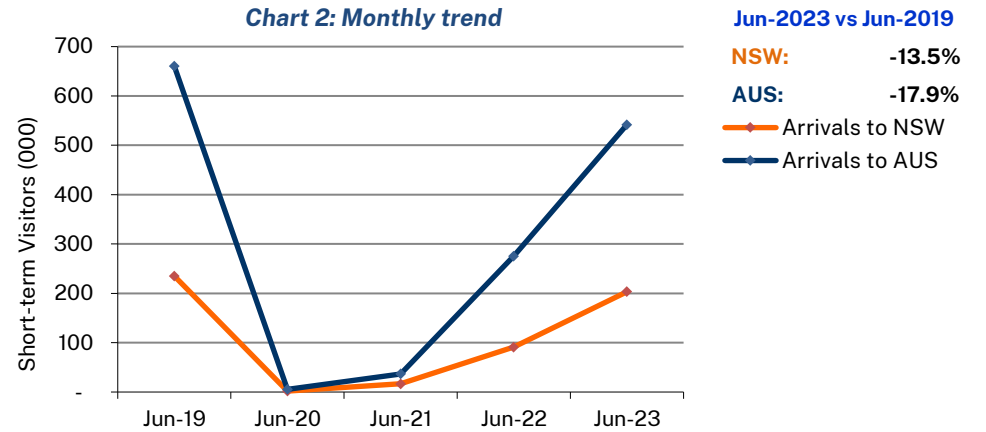
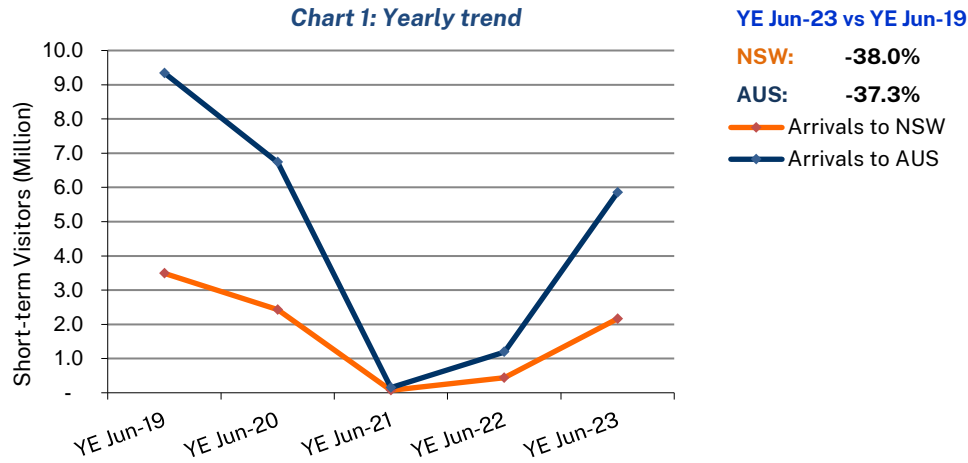


Overseas Arrivals Trend

Source: Australian Bureau of Statistics

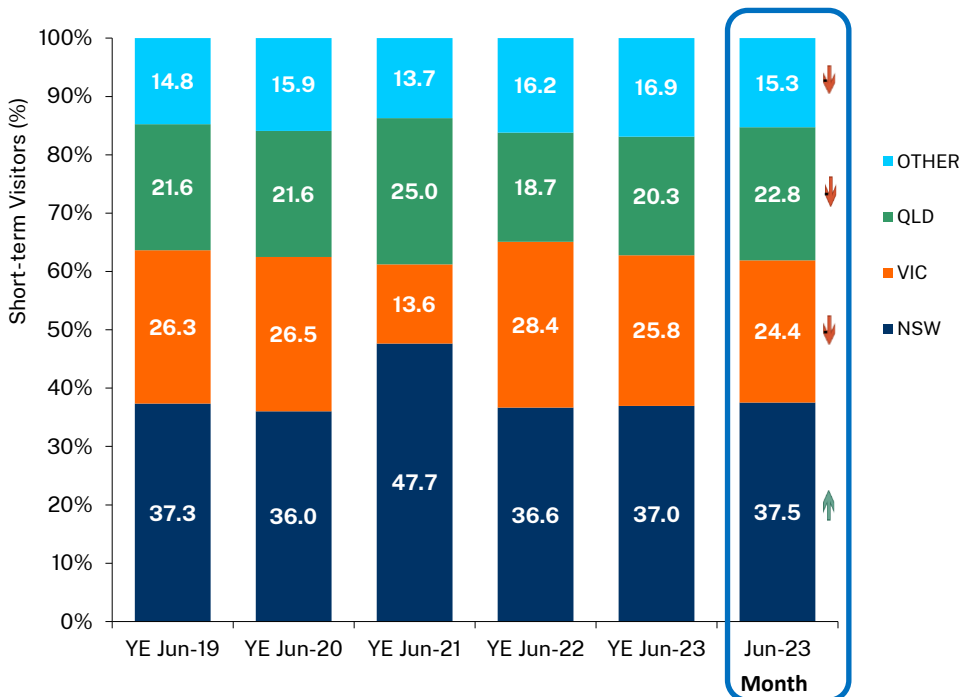
JUNE 2023

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?

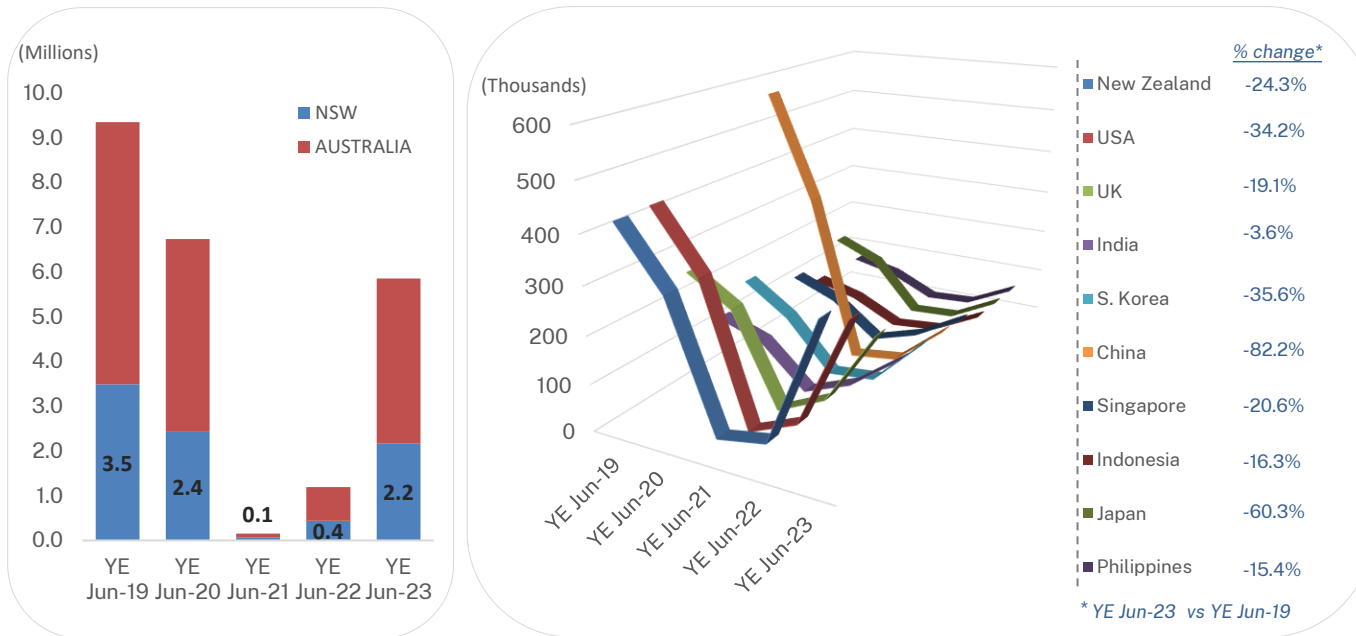
International visitation to Australia is progressively recovering, but still lower than the pre-pandemic (2019) level. In February 2022, the Australian government reopened its border to all vaccinated travellers. However, the key Covid restrictions were lifted later in July 2022 (Australian and New Zealand borders were open to all travellers regardless of their vaccination status) and October 2022 (all COVID-19 isolation requirements were ended nationwide).

In the year ended (YE) June 2023, international short-term visitor arrivals to NSW decreased by 38.0 per cent (Chart 1) when compared to YE June 2019 (pre-pandemic). Meanwhile, in the month of June 2023 (Chart 2), NSW received 203,410 short-term visitor arrivals, still down 13.5 per cent when compared to June 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 37.0 per cent of international visitors (Chart 3) in the YE June 2023, which was 0.4 percentage points more than the same period prior year.

For the month of June 2023, NSW received 37.5 per cent of international visitors, 4.3 percentage points more than June 2022. Victoria's share decreased by 2.5 percentage points and Queensland's market share decreased by a marginal 0.2 percentage point this month.

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



Where are they from?

Australia:

As of **YE June 2023** (Chart 4), Australia received 5.9 million international short-term visitor arrivals (down 37.3 per cent on YE June 2019).

The top three markets by numbers of arrivals to Australia as of YE June 2023 were New Zealand (1.1 million), the UK (573,510) and the USA (557,270).

NSW:

In the **YE June 2023** (Chart 4), NSW received over 2.2 million international short-term visitors (down 38.0 per cent on YE June 2019). This figure represents the one of the lowest short-term visitor arrivals on record for YE June since 2008 (the lowest in 2021). This year, NSW received over half (62 per cent) of its pre-COVID arrivals (YE June 2019).

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

Table 1: Top 5 Source Markets for NSW: Arrivals

Year Ended June 2023					
Country of Origin	Rank	No. of Visitors	YE Jun-23 vs YE Jun-22	Share of NSW visitors	Share of AUS
New Zealand	1	320,890	+261,860	14.8%	29.6%
USA	2	280,770	+232,670	13.0%	50.4%
UK	3	210,870	+158,300	9.7%	36.8%
India	4	119,150	+78,050	5.5%	31.1%
S. Korea	5	111,680	+101,380	5.2%	65.8%
Top 5 source markets TOTAL		1,043,360	+808,150	48.2%	
NSW		2,164,550	+1,727,900	-	37.0%

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

Month of June 2023					
Country of Origin	Rank	No. of Visitors	Jun-23 vs Jun-22	Share of NSW visitors	Share of AUS
New Zealand	1	32,970	+16,190	16.2%	30.9%
USA	2	24,040	+11,920	11.8%	49.0%
China	3	16,140	+13,470	7.9%	43.2%
S. Korea	4	12,680	+10,270	6.2%	69.6%
India	5	10,540	+2,490	5.2%	28.7%
Top 5 source markets TOTAL		96,370	+45,930	47.4%	
NSW		203,410	+112,070	-	37.5%

In the **month of June 2023**, NSW received 203,410 short-term visitor arrivals, recording an increase on the same month in the previous year (but down 13.5 per cent on June 2019). This month, the State received 87 per cent of June 2019 arrivals. New Zealand gained first place for the highest number of overseas arrivals to NSW followed by the USA and China.

The top three markets recovered by % since YE June 2019 were India (96%), Thailand (89%), and Philippines (85%).

Arrivals to NSW by reason for journey

Chart 5: Reason for journey to NSW

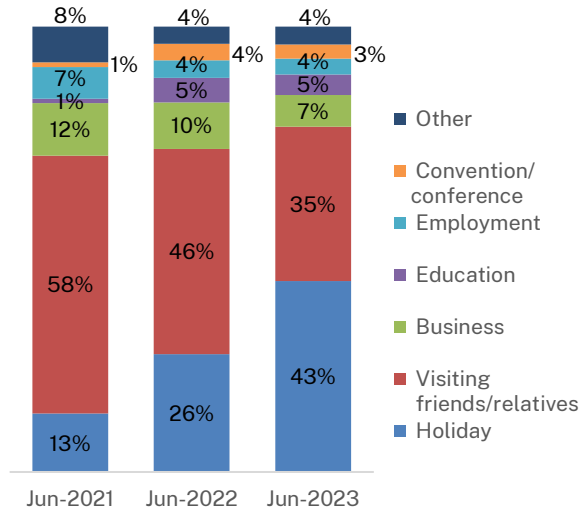
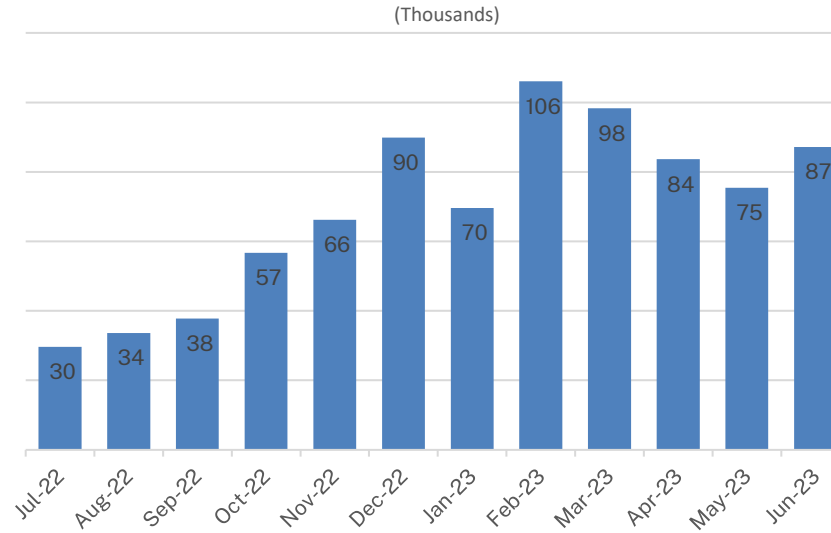


Chart 6: Holiday arrivals to NSW



What was the reason for their journey?

In the **month of June 2023**, NSW received 43 per cent of short-term visitors who came for a Holiday and 35 per cent of those Visiting friends/relatives. When compared with the COVID-19 impacted months (Jun 2021 and Jun 2022), the Holiday market has grown in proportion, placing itself as a top reason for travel to NSW, which indicates that NSW's major tourism sector is heading in the full recovery direction (Chart 5).

Over the past year, the holiday visitor arrivals to NSW have shown a fluctuation with February 2023 and March 2023 being the most popular months (Chart 6). Since July 2022, the USA and New Zealand were interchangeably top origin markets to NSW, while Korea emerged as the top market in May 2023.

In the month of June 2023, the largest number of holiday visitors came from New Zealand, then the USA and Korea.

Overseas Departures

In the year ended June 2023, there were over 1.9 million departures from NSW, which was over half (55 per cent) of 2019 departures from the State. When compared with the year before, the number of departures rose by 1.6 million. The most popular destinations were: New Zealand, the USA and UK.