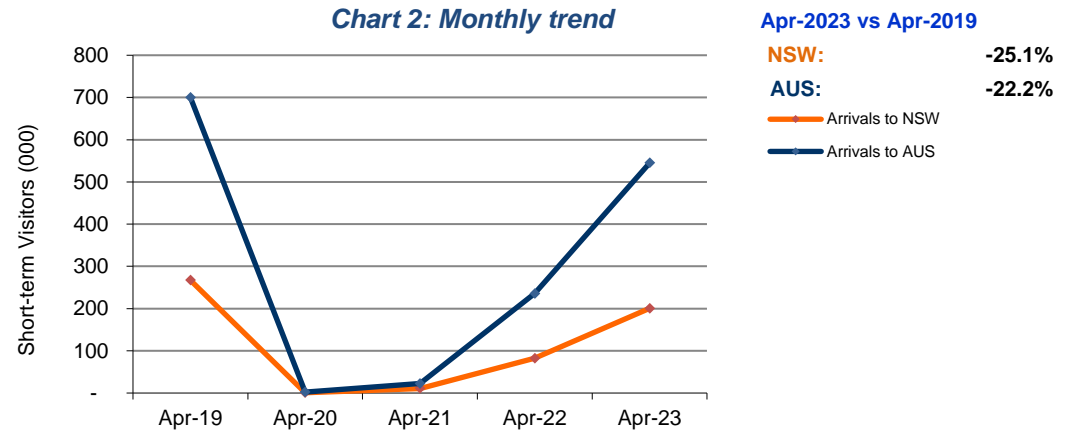
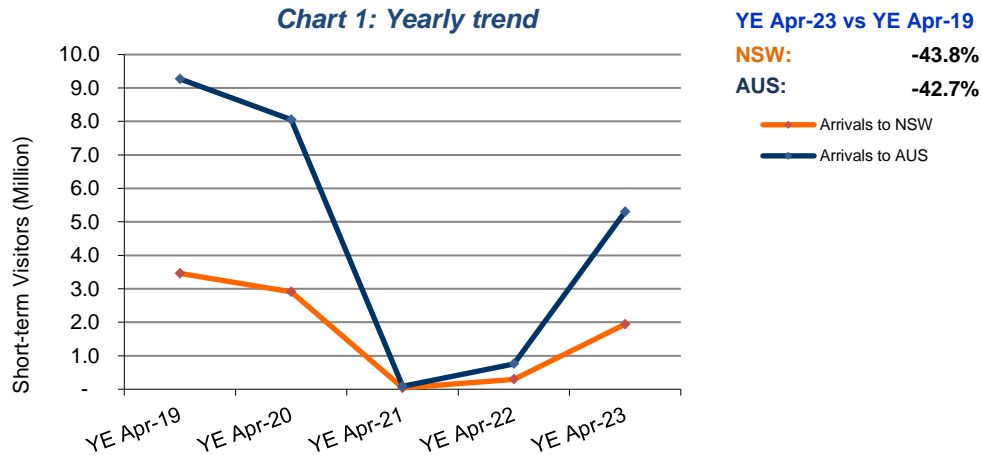


Overseas Arrivals Trend

Source: Australian Bureau of Statistics

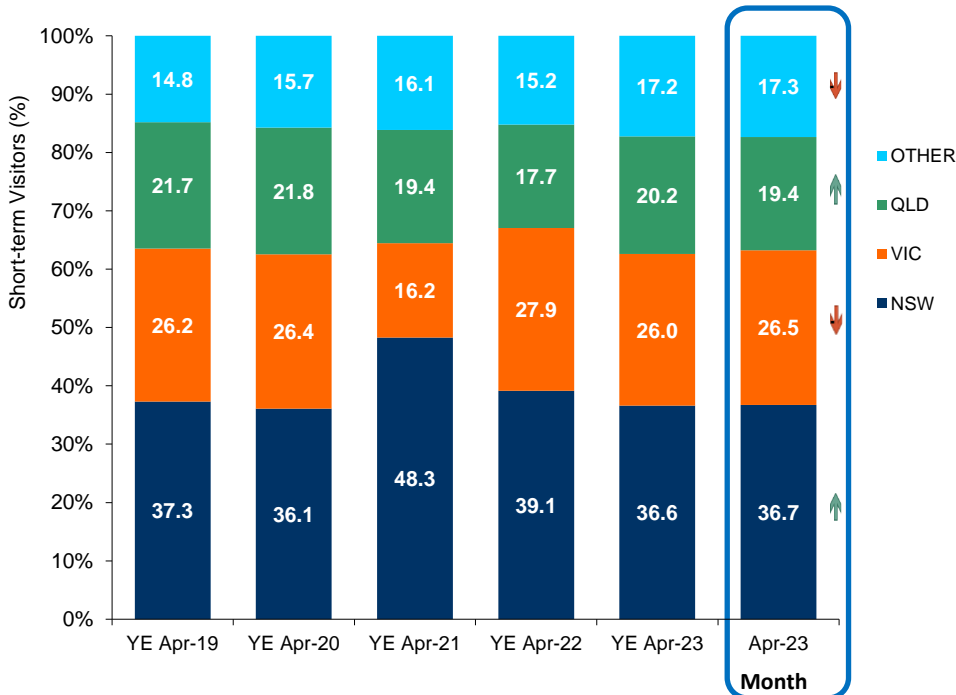
APRIL 2023

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?

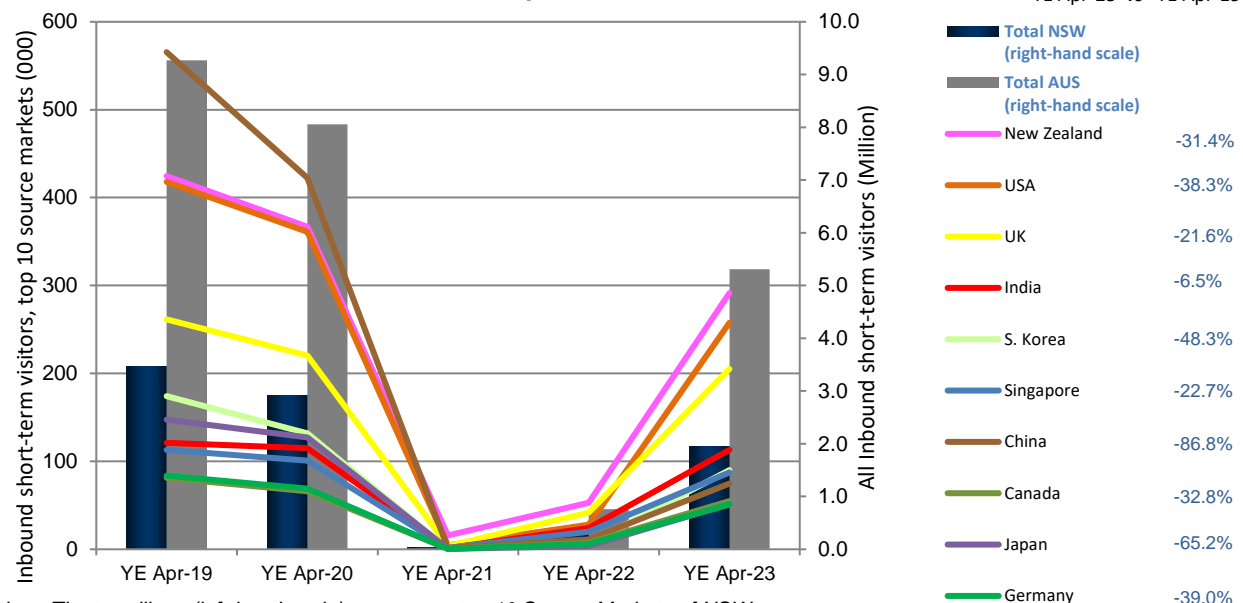
International visitation to Australia is progressively recovering, but still lower than the pre-pandemic (2019) level. In February 2022, the Australian government reopened its border to all vaccinated travellers. However, the key Covid restrictions were lifted in July 2022 (Australian and New Zealand 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) April 2023, international short-term visitor arrivals to NSW decreased by 43.8 per cent (Chart 1) when compared to YE April 2019 (pre-pandemic). Meanwhile, in the month of April 2023 (Chart 2), NSW received 200,230 short-term visitor arrivals, still down 25.1 per cent when compared to April 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 36.6 per cent of international visitors (Chart 3) in the YE April 2023, which was 2.5 percentage points lower than the prior year.

For the month of April 2023, NSW received 36.7 per cent of international visitors, 1.8 percentage points more than April 2022. Queensland's share increased by a marginal 0.3 percentage points, while Victoria's market share decreased by 1.4 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:

In the **YE April 2023** (Chart 4), Australia received 5.3 million international short-term visitor arrivals (down 42.7 per cent on YE April 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 April 2023. Inbound monthly arrivals to the country fluctuated over the year.

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

NSW:

In the **YE April 2023** (Chart 4), NSW received over 1.9 million international short-term visitors (down 43.8 per cent on YE April 2019). This number represents the third lowest volume of short-term visitor arrivals on record (since 2008) for YE April (the lowest number of arrivals was recorded in 2021). This year, NSW received only 56 per cent of its pre-Covid arrivals (YE April 2019).

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

In the **month of April 2023**, NSW received 200,230 short-term visitor arrivals, recording an increase on the same month in the previous year (but down 25.1 per cent on April 2019). This month, the State received 75 per cent of April 2019 arrivals. New Zealand gained first place for the highest number of overseas arrivals to NSW followed by the USA and the UK.

Table 1: Top 5 Source Markets for NSW: Arrivals

Year Ended April 2023					
Country of Origin	Rank	No. of Visitors	YE Apr-23 vs YE Apr-22	Share of NSW visitors	Share of AUS
New Zealand	1	291,280	+238,330	15.0%	29.7%
USA	2	257,660	+229,630	13.2%	50.4%
UK	3	205,130	+163,320	10.5%	36.7%
India	4	113,180	+89,180	5.8%	31.0%
S. Korea	5	90,010	+84,080	4.6%	63.8%
Top 5 source market TOTAL		957,260	+790,430	49.2%	
NSW		1,945,050	+1,648,360	-	36.6%

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

Month of April 2023					
Country of Origin	Rank	No. of Visitors	Apr-23 vs Apr-22	Share of NSW visitors	Share of AUS
New Zealand	1	33,380	+20,510	16.7%	29.8%
USA	2	21,920	+13,990	10.9%	47.4%
UK	3	16,290	+5,360	8.1%	38.0%
China	4	13,240	+11,650	6.6%	41.4%
S. Korea	5	11,070	+9,280	5.5%	70.5%
Top 5 source market TOTAL		95,900	+50,310	47.9%	
NSW		200,230	+117,950	-	36.7%