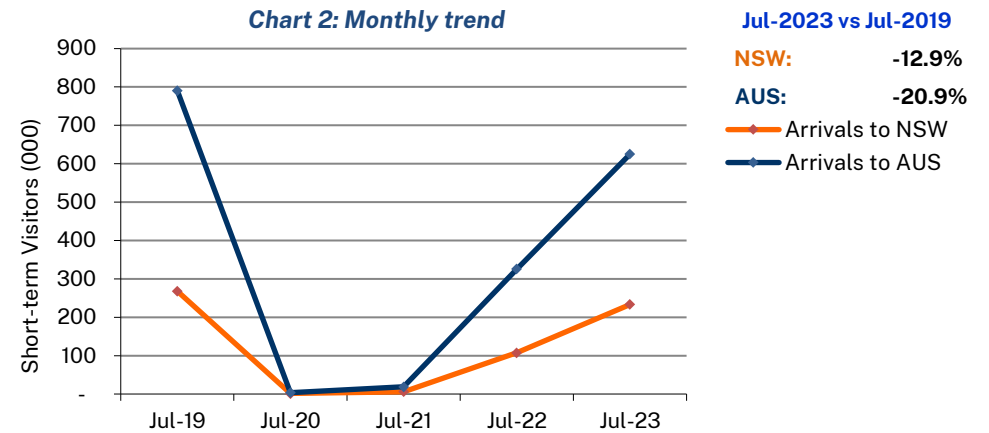
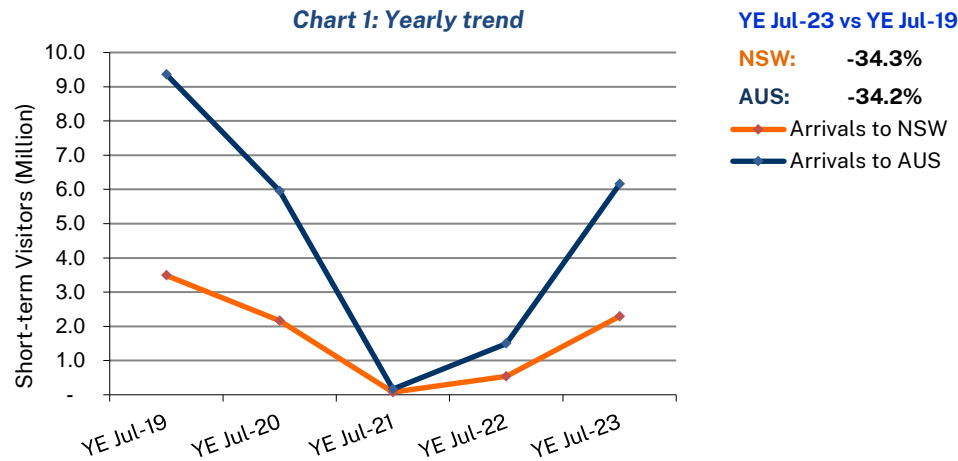


Overseas Arrivals and Departures Trend

JULY 2023

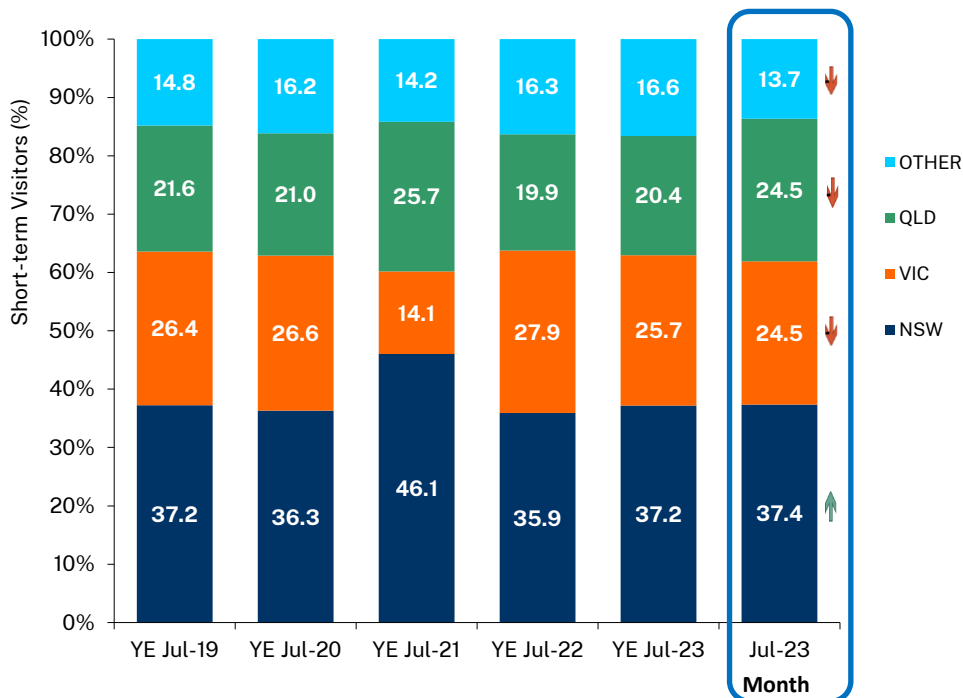
Source: Australian Bureau of Statistics

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?

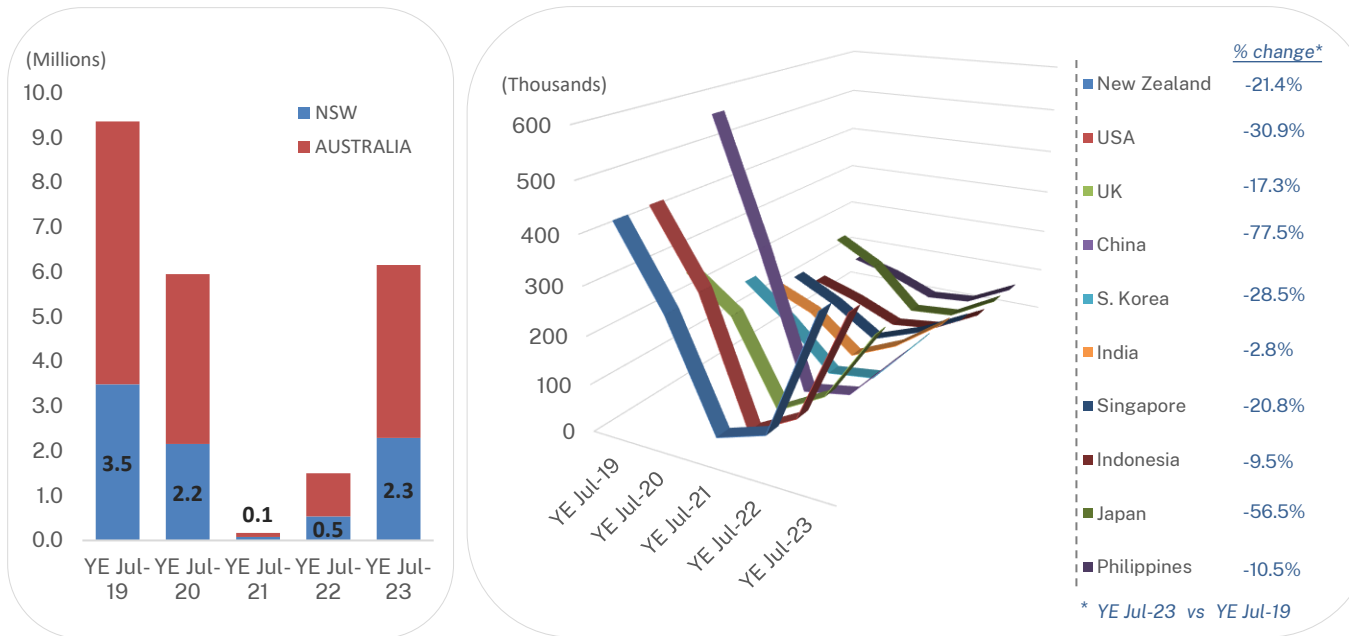
International visitation to Australia is progressively recovering, but still lower than the pre-pandemic (2019) level. In February 2022, the Australian government reopened its border to all vaccinated travellers. However, the key Covid restrictions were lifted later in July 2022 (Australian and New Zealand 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) July 2023, international short-term visitor arrivals to NSW decreased by 34.3 per cent (Chart 1) when compared to YE July 2019 (pre-pandemic). Meanwhile, in the month of July 2023 (Chart 2), NSW received 233,530 short-term visitor arrivals, still down 12.9 per cent when compared to July 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 37.2 per cent of international visitors (Chart 3) in the YE July 2023, which was 1.3 percentage points more than the same period prior year.

For the month of July 2023, NSW received 37.4 per cent of international visitors, 4.3 percentage points more than July 2022, while Victoria's and Queensland's share decreased by a marginal 0.6 and 0.7 percentage point respectively this month.

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



Where are they from?

Australia:

As of **YE July 2023** (Chart 4), Australia received 6.2 million international short-term visitor arrivals (down 34.2 per cent on YE July 2019).

The top three markets by numbers of arrivals to Australia as of YE July 2023 were New Zealand (1.1 million), the USA (586,210) and the UK (581,160).

NSW:

In the **YE July 2023** (Chart 4), NSW received 2.3 million international short-term visitors (down 34.3 per cent on YE July 2019). This figure represents the one of the lowest short-term visitor arrivals on record for YE July since 2008 (the lowest in 2021). This year, NSW received over half (66 per cent) of its pre-COVID arrivals (YE July 2019).

All top 5 source markets in **YE July 2023** marked an increase as compared to YE July 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 July 2023						Month of July 2023					
Country of Origin	Rank	No. of Visitors	YE Jul-23 vs YE Jul-22	Share of NSW visitors	Share of AUS	Country of Origin	Rank	No. of Visitors	Jul-23 vs Jul-22	Share of NSW visitors	Share of AUS
New Zealand	1	334,580	+258,170	14.6%	29.9%	New Zealand	1	34,550	+13,690	14.8%	29.8%
USA	2	295,690	+235,110	12.9%	50.4%	China	2	30,080	+25,390	12.9%	38.1%
UK	3	214,720	+154,000	9.4%	36.9%	USA	3	27,790	+14,920	11.9%	49.6%
China	4	126,880	+106,780	5.5%	41.1%	S. Korea	4	15,810	+12,290	6.8%	68.9%
S. Korea	5	123,970	+110,180	5.4%	66.8%	UK	5	12,350	+3,850	5.3%	37.4%
Top 5 source markets TOTAL		1,095,840	+811,000	47.8%		Top 5 source markets TOTAL		120,580	+66,440	51.6%	
NSW		2,290,510	+1,752,450	-	37.2%	NSW		233,530	+125,960	-	37.4%

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

In the month of July 2023, NSW received 233,530 short-term visitor arrivals, recording an increase on the same month in the previous year (but down 12.9 per cent on July 2019). This month, the State received 87 per cent of July 2019 arrivals. New Zealand still holds first place for the highest number of overseas arrivals to NSW followed by China and the USA. The arrivals from China have been on a continued rise over the past four months, hence, this month it placed second for the first time since the beginning of 2020.

The top three markets recovered by % since YE July 2019 were India (97%), Thailand (97%) and Indonesia (90%).

Arrivals to NSW by reason for journey

Chart 5: Reason for journey to NSW

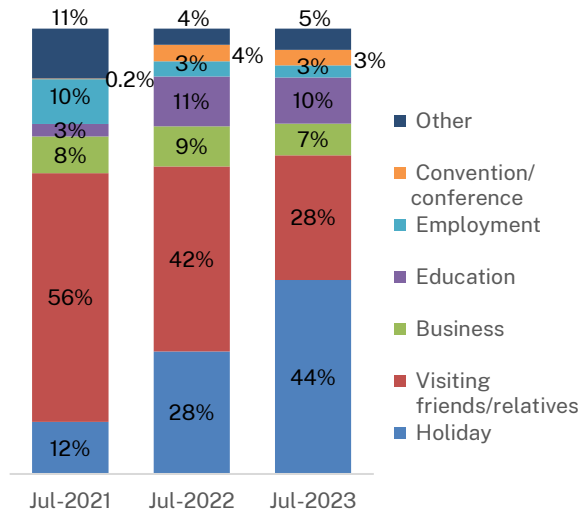
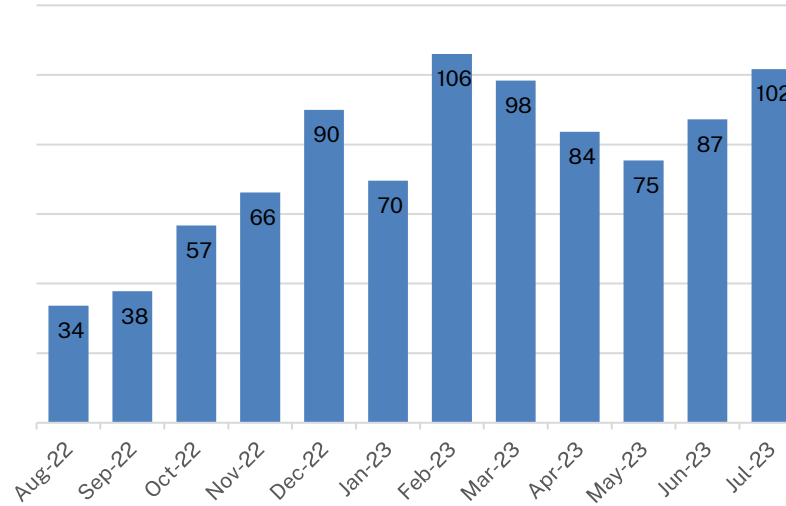


Chart 6: Holiday arrivals to NSW

(Thousands)



What was the reason for their journey?

In the **month of July 2023**, NSW received 44 per cent of short-term visitors who came for a Holiday and 28 per cent of those Visiting friends/relatives. When compared with the COVID-19 impacted months (Jul 2021 and Jul 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 July 2023 being the most popular months for the travel (Chart 6).

Since August 2022, the USA and New Zealand were interchangeably top origin markets for holiday visitors to NSW. Korea emerged as one of the top three origin markets at the beginning of 2023 and became number one in May 2023.

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

Overseas Departures

In the year ended July 2023, there were over 2.0 million departures from NSW, which was over half (58 per cent) of 2019 departures from the State. When compared with the year before, the number of departures rose by 1.7 million. The most popular destinations were: New Zealand, the USA and UK.