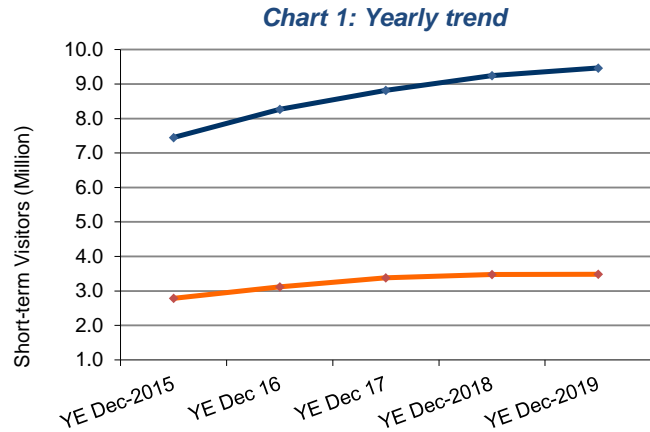


Overseas Arrivals Trend

Source: Australian Bureau of Statistics (ABS).

DECEMBER 2019

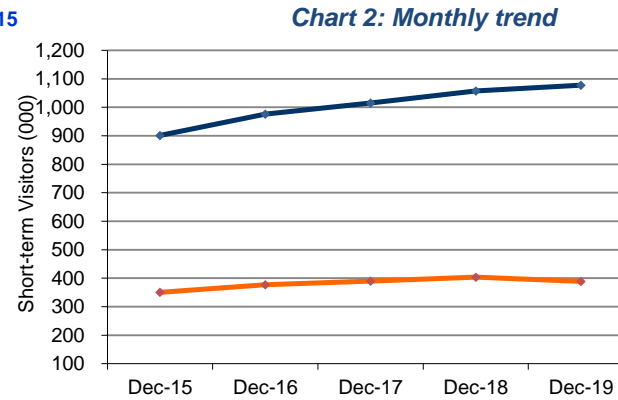
Short-term International Visitor Arrivals to NSW vs. Australia



YE Dec-2019 vs YE Dec-2015

NSW: + 25.1%
AUS: + 27.1%

— Arrivals to NSW
— Arrivals to AUS

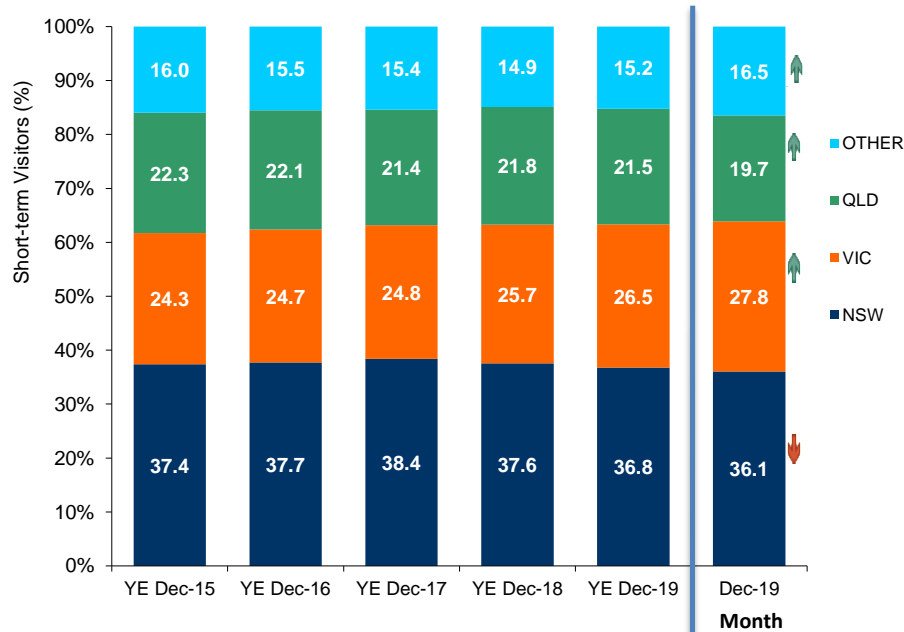


Dec-2019 vs Dec-2015

NSW: + 11.0%
AUS: + 19.6%

— Arrivals to NSW
— Arrivals to AUS

Chart 3: Short-term International Visitor Arrivals to Australia: Market Share by state of Arrival



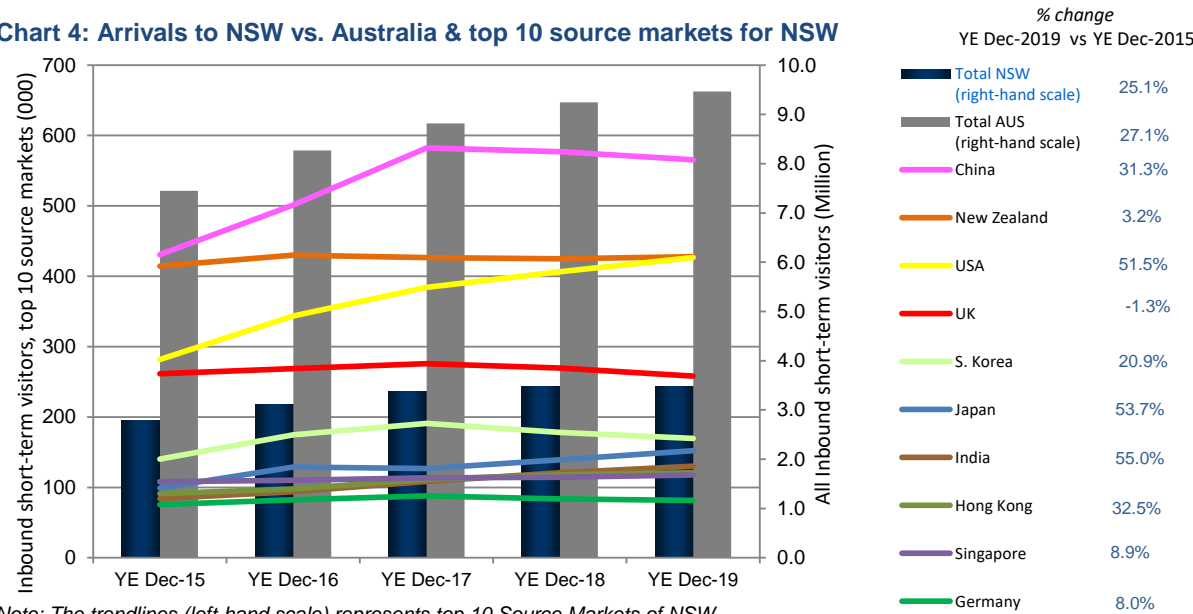
How has international visitor movement changed?

In **YE December 2019**, international short-term visitor arrivals to NSW increased by 25.1 per cent (Chart 1) when compared to YE December 2015. By comparison, international short-term visitor arrivals to Australia registered a growth of 27.1 per cent.

In the month of **December 2019** (Chart 2), the arrivals to NSW recorded an increase of 11.0 per cent when compared to November 2015. This was lower than the growth in arrivals to Australia for the same period (19.6 per cent).

NSW continues to lead Australia, attracting 36.8 per cent of international visitors (Chart 3) in the **year ended (YE) December 2019**. For the **month** of December 2019, NSW received 36.1 per cent of international visitors.

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 December 2019 (Chart 4), Australia received over 9.4 million international short-term visitor arrivals (up 2.4 per cent on YE December 2018).

The top three markets for Australia for the year were China (up 0.5 per cent), New Zealand (up 3.5 per cent) and USA (up 3.7 per cent). The biggest growth for the year was India arrivals to Australia (up 11.6 per cent), followed by Singapore (up 6.8 per cent).

NSW:

In the YE December 2019 (Chart 4), NSW received nearly 3.5 million international short-term visitors. China has been NSW's top source market since YE October 2015, taking over the lead position from New Zealand.

Between YE December 2015 and YE December 2019, China's growth rate was more than 9 times that of New Zealand (31.3 per cent vs. 3.2 per cent). USA, Japan and India were the other markets with strong growth rates over the same period.

Table 1: Top 10 Source Markets for NSW: Arrivals

Year Ended December 2019					
Country of Origin	Rank	No. of Visitors	YE Dec-2019 vs YE Dec-2018	Share of NSW visitors	Share of AUS
China	1	565,470	-2.0%	16.2%	39.3%
New Zealand	2	427,680	0.7%	12.3%	29.8%
USA	3	426,640	5.0%	12.2%	52.2%
UK	4	258,100	-4.3%	7.4%	36.1%
S. Korea	5	169,380	-4.8%	4.9%	60.4%
Japan	6	152,080	9.3%	4.4%	30.5%
India	7	130,070	7.7%	3.7%	32.6%
Hong Kong	8	120,600	2.6%	3.5%	38.3%
Singapore	9	117,530	2.9%	3.4%	24.6%
Germany	10	81,440	-2.7%	2.3%	39.3%
Top 10 source market TOTAL	-	2,448,990	0.7%	70.3%	-
NSW	-	3,482,840	0.3%	-	36.8%

Note: Top 10 source market total is not necessarily made up of the same countries in the previous year.

Month of December 2019					
Country of Origin	Rank	No. of Visitors	Dec-19 vs Dec-18	Share of NSW visitors	Share of AUS
USA	1	53,880	-3.4%	13.9%	53.9%
UK	2	41,970	-2.8%	10.8%	35.4%
China	3	40,420	-6.9%	10.4%	36.2%
New Zealand	4	40,010	-2.9%	10.3%	27.9%
S. Korea	5	16,650	-3.5%	4.3%	53.3%
Japan	6	15,060	-11.3%	3.9%	28.9%
India	7	14,560	14.5%	3.7%	32.6%
Hong Kong	8	13,540	-7.0%	3.5%	36.5%
Singapore	9	12,920	-2.9%	3.3%	22.9%
Germany	10	11,840	-5.5%	3.0%	40.3%
Top 10 source market TOTAL	-	260,850	-3.7%	67.1%	-
NSW	-	388,710	-3.7%	-	36.1%

Note: Top 10 source market total is not necessarily made up of the same countries in the same month previous year.

The top three markets for NSW for the **YE December 2019** (Table 1) were China, New Zealand and USA. NSW accounted for nearly 40 per cent of Chinese visitors to Australia, 30 per cent of New Zealand visitors and 52 per cent of USA visitors.

Six of the top 10 source markets to NSW recorded growth for the year: Japan, USA, India, Hong Kong, Singapore and New Zealand.

For the month of December 2019, the top three markets for NSW (Table 1) were USA, UK and China. NSW accounted for 53.9 per cent of USA visitors to Australia, 35.4 per cent of UK visitors and 36.2 per cent of Chinese visitors.

Of the top ten source markets for the month, there was a growth in short-term international arrivals to NSW from India.