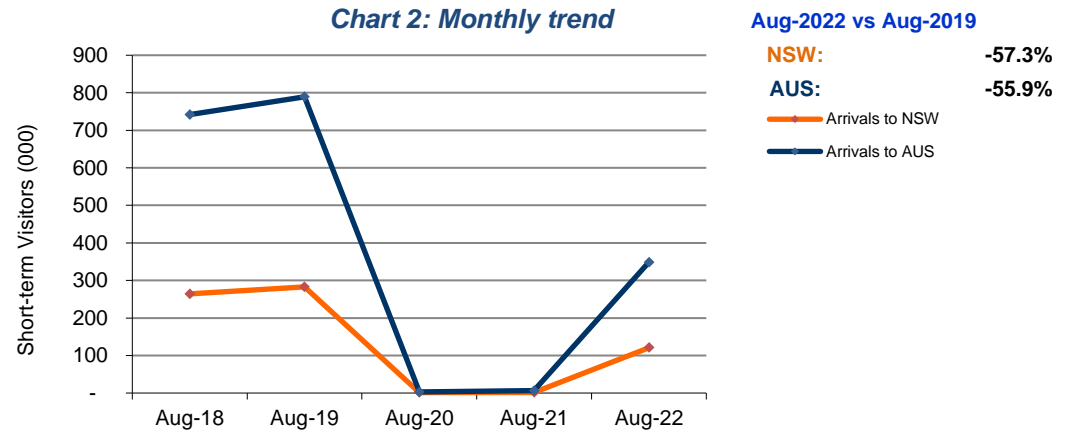
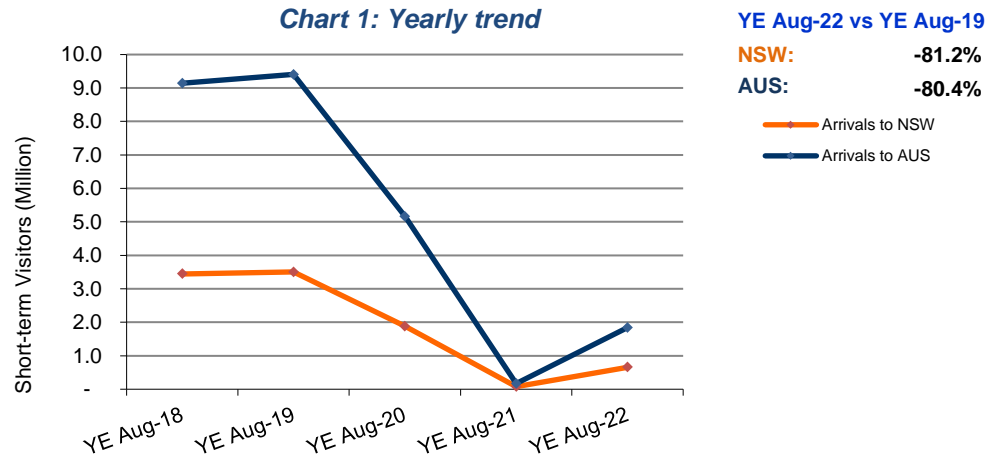


Overseas Arrivals Trend

Source: Australian Bureau of Statistics

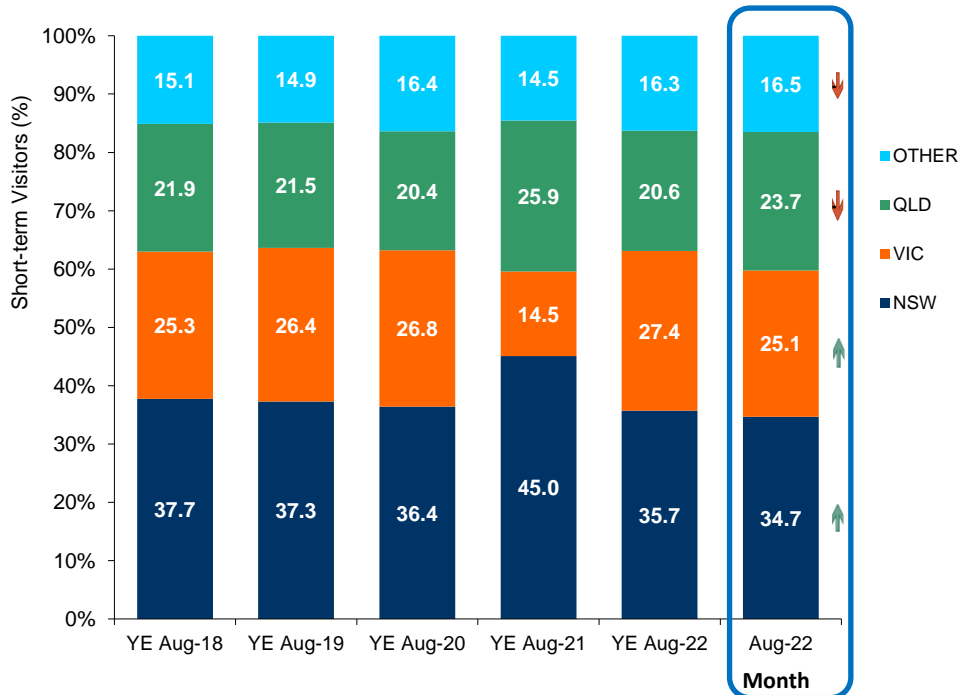
AUGUST 2022

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?

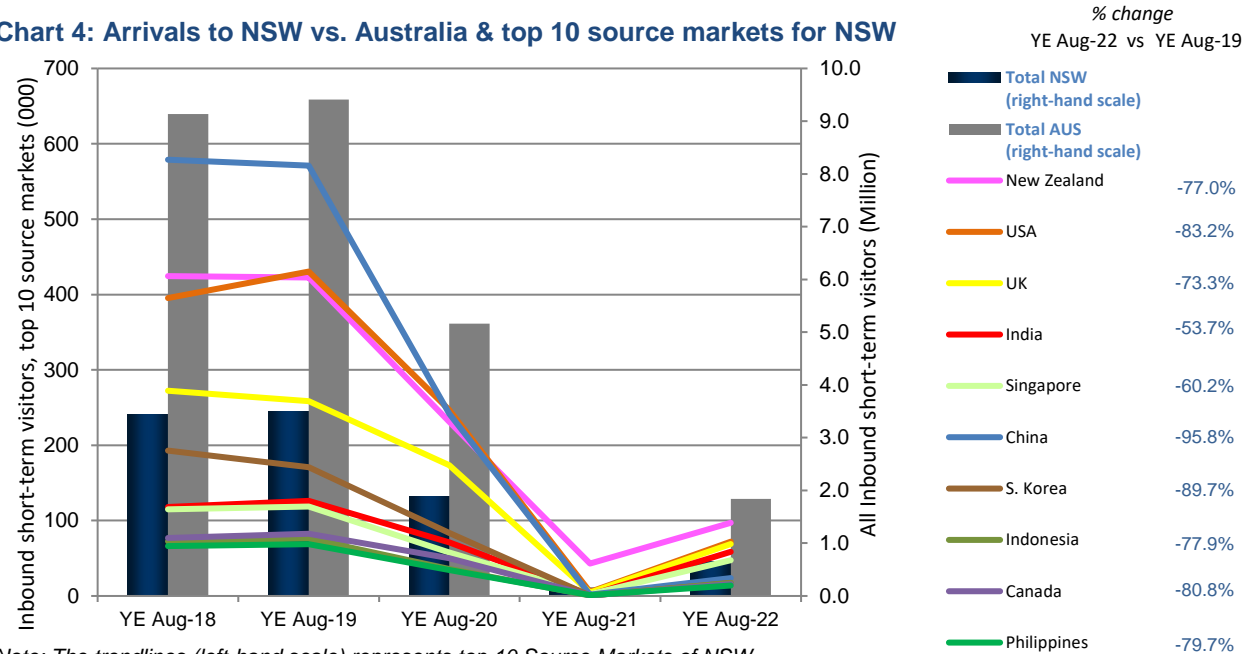
Australia's international border closed at the end of March in 2020 due to COVID-19 pandemic and reopened to fully vaccinated travellers in late February 2022. Prior to February 2022, travel to Australia had been allowed to Australians and New Zealanders under strict monitoring and other certain travel groups who had been granted individual exemptions. The two-way trans-Tasman bubble was paused in June 2021, then resumed in April 2022 enabling quarantine/ isolation-free travel between Australia and New Zealand. The month of August 2022 marked consecutive 6 months of international short-term arrivals to Australia after reopening of the international border. Also, August 2022 recorded the highest number of international visitors to NSW in the post-COVID period.

In the year ended (YE) August 2022, international short-term visitor arrivals to NSW decreased by 81.2 per cent (Chart 1) when compared to YE August 2019 (pre-pandemic). Meanwhile, in the month of August 2022 (Chart 2), NSW received 120,860 short-term visitor arrivals, down 57.3 per cent when compared to August 2019. In contrast, both yearly and monthly arrivals saw a considerable increase when compared with same periods in 2021 respectively.

NSW maintains its lead of Australia, attracting 35.7 per cent of international visitors (Chart 3) in the YE August 2022 - 9.3 percentage points lower than prior year.

For the month of August 2022, NSW received 34.7 per cent of international visitors, 12 percentage points more on August 2021. Victoria's share increased by 3 percentage points, while Queensland's market share decreased this month by 5 percentage points.

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 August 2022** (Chart 4), Australia received 1.8 million international short-term visitor arrivals (down 80.4 per cent on YE August 2019). As the closure of Australia's international border remained in force until late February 2022, arrivals from all countries continued to be highly impacted.

The top three markets for Australia for the year were New Zealand, India and the UK. New Zealand's ongoing top market spot has been reinforced by the reciprocal trans-Tasman travel bubble. Quarantine-free travel between New Zealand and Australia was suspended in mid-June 2021 due to the re-emergence of COVID-19 cases, however the one-way travel bubble resumed in early March 2022, which converted to two-way bubble in April 2022.

NSW:

In the **YE August 2022** (Chart 4), NSW received 657,470 international short-term visitors (down 81.2 per cent on YE August 2019). This number represents the second lowest volume of international short-term visitors on record (since 2008) for YE August (the lowest number of arrivals was recorded in 2021). This year, NSW received only 19 per cent of its pre-Covid arrivals (YE August 2019).

All the top 5 source markets in YE August 2022 marked an increase as compared to YE August 2021. The USA recorded the largest absolute increase in arrivals to NSW, followed by the UK (Table 1).

In the **month of August 2022**, NSW received 120,860 short-term visitor arrivals, recording an increase on the same month in the previous year (but down 57.3 per cent on August 2019). This month, the State received 43 per cent of the pre-Covid arrivals. The highest number of overseas arrivals to NSW was recorded by New Zealand, followed by the USA and India.

Table 1: Top 5 Source Markets for NSW: Arrivals

Year Ended August 2022					
Country of Origin	Rank	No. of Visitors	YE Aug-22 vs YE Aug-21	Share of NSW visitors	Share of AUS
New Zealand	1	97,120	+54,110	14.8%	29.2%
USA	2	72,100	+66,750	11.0%	47.5%
UK	3	69,020	+64,550	10.5%	38.0%
India	4	58,400	+57,030	8.9%	31.0%
Singapore	5	47,290	+44,980	7.2%	27.3%
Top 5 source market TOTAL		343,930	+287,090	52.3%	
NSW		657,470	+581,160	-	35.7%

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

Month of August 2022					
Country of Origin	Rank	No. of Visitors	Aug-22 vs Aug-21	Share of NSW visitors	Share of AUS
New Zealand	1	20,890	+20,710	17.3%	27.7%
USA	2	11,710	+11,520	9.7%	45.5%
India	3	11,490	+11,430	9.5%	35.5%
UK	4	8,440	+8,300	7.0%	35.3%
Singapore	5	7,180	+7,130	5.9%	24.6%
Top 5 source market TOTAL		59,710	+59,050	49.4%	
NSW		120,860	+119,410	-	34.7%

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