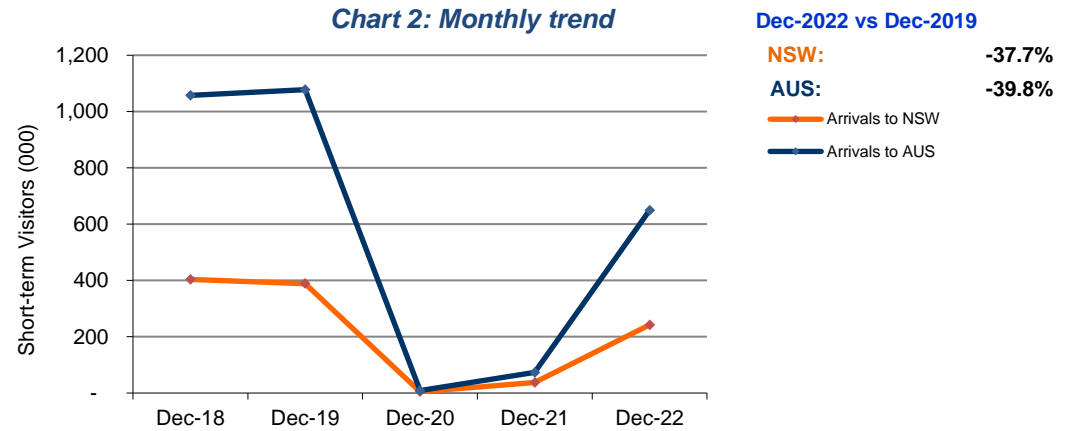
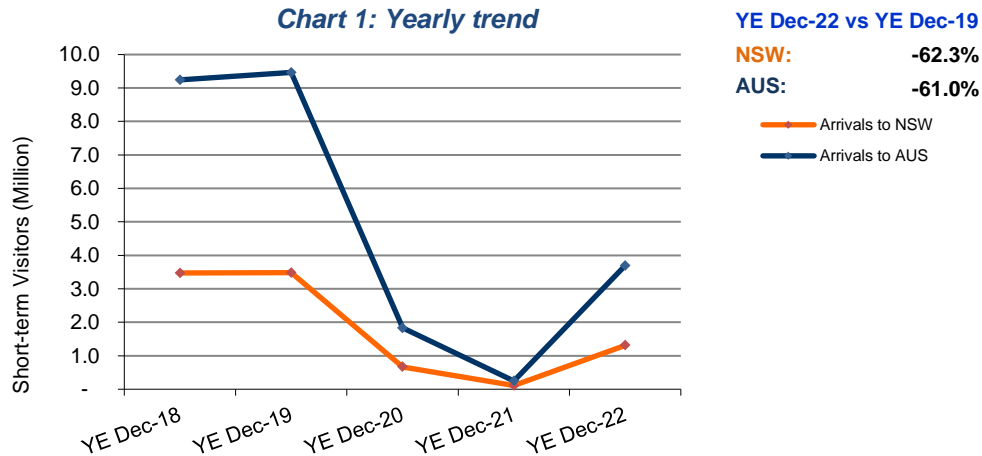


Overseas Arrivals Trend

Source: Australian Bureau of Statistics

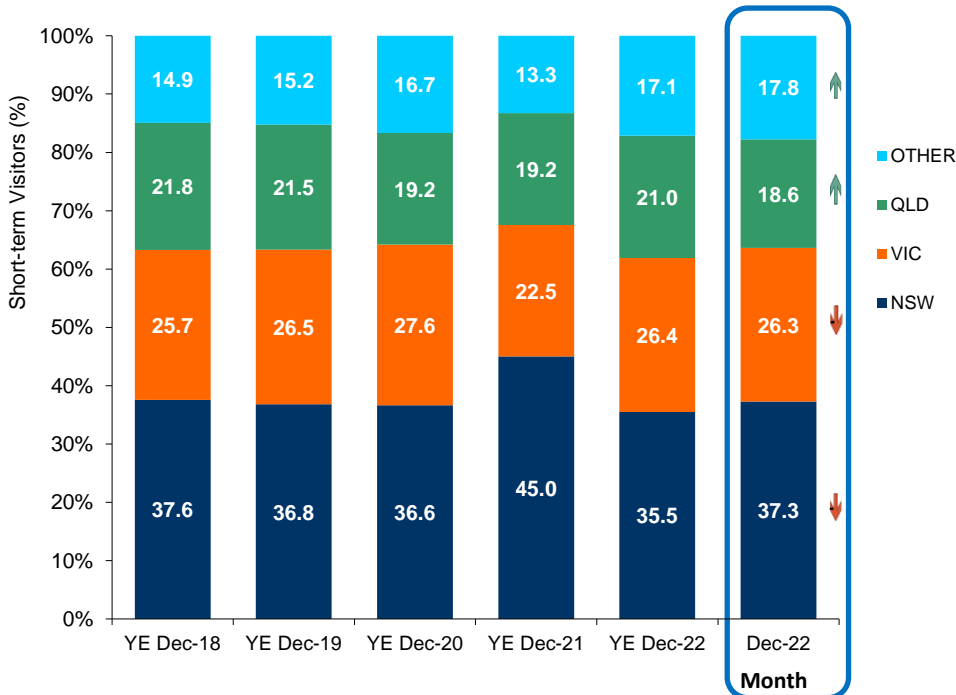
DECEMBER 2022

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?

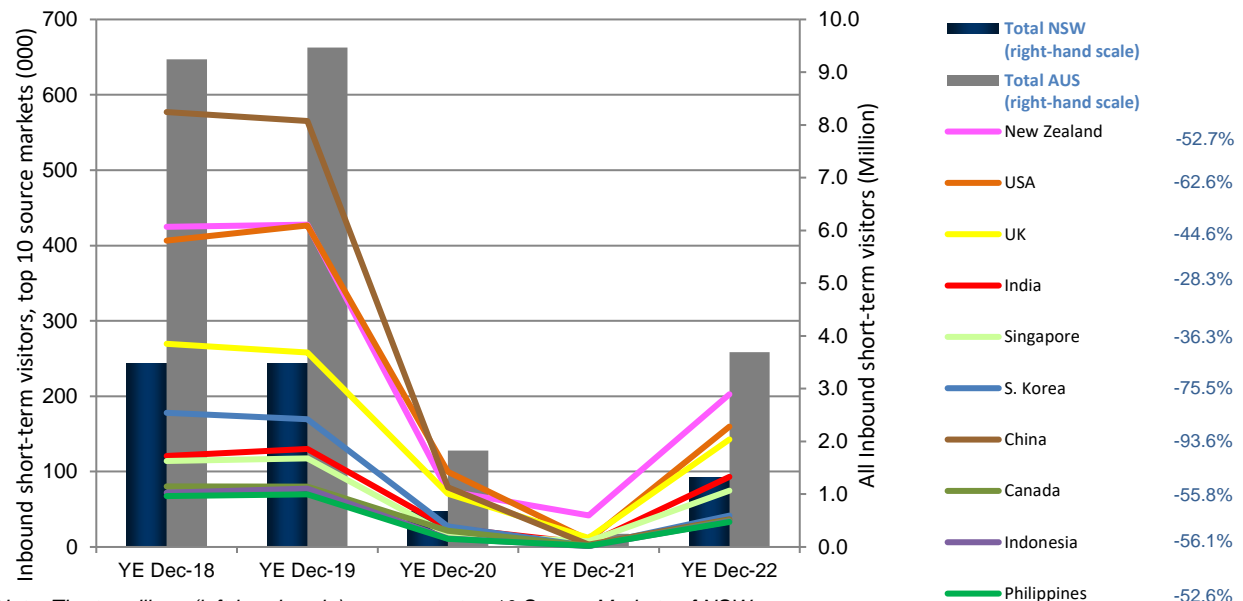
Australia's international border closed at the end of March in 2020 due to the COVID-19 pandemic and reopened to fully vaccinated travellers in late February 2022. Prior to February 2022, travel to Australia had been allowed to Australians and New Zealanders under strict monitoring and other certain 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. Since early July 2022, all travellers have been allowed to enter and/ or leave Australia regardless of their vaccination status.

In the year ended (YE) December 2022, international short-term visitor arrivals to NSW decreased by 62.3 per cent (Chart 1) when compared to YE December 2019 (pre-pandemic). Meanwhile, in the month of December 2022 (Chart 2), NSW received 242,050 short-term visitor arrivals, which was the highest number of arrivals in the post-COVID period, but still down 37.7 per cent when compared to December 2019. In contrast, both yearly and monthly arrivals saw a considerable increase when compared with the same periods in 2021 respectively.

NSW maintains its lead in share of arrivals to Australia, attracting 35.5 per cent of international visitors (Chart 3) in the YE December 2022, which was 9.5 percentage points lower than the prior year.

For the month of December 2022, NSW received 37.3 per cent of international visitors, 13 percentage points less than December 2021. Victoria's share also decreased by 10 percentage points, while Queensland's market share increased this month by 14 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 December 2022** (Chart 4), Australia received 3.7 million international short-term visitor arrivals (down 61.0 per cent on YE December 2019). As the closure of Australia's international border remained in force until late February 2022, arrivals from all countries continued to be impacted.

The top three markets for Australia for the year were New Zealand, the USA and 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 a two-way bubble in April 2022.

NSW:

In the **YE December 2022** (Chart 4), NSW received 1.3 million international short-term visitors (down 62.3 per cent on YE December 2019). This number represents the third lowest volume of international short-term visitors on record (since 2008) for YE December (the lowest number of arrivals was recorded in 2021). This year, NSW received only 38 per cent of its pre-Covid arrivals (YE December 2019).

Table 1: Top 5 Source Markets for NSW: Arrivals

Year Ended December 2022					
Country of Origin	Rank	No. of Visitors	YE Dec-22 vs YE Dec-21	Share of NSW visitors	Share of AUS
New Zealand	1	202,370	+160,540	15.4%	29.0%
USA	2	159,770	+150,580	12.2%	49.0%
UK	3	142,880	+130,940	10.9%	35.8%
India	4	93,210	+88,480	7.1%	30.7%
Singapore	5	74,850	+67,280	5.7%	25.3%
Top 5 source market TOTAL		673,080	+597,820	51.3%	
NSW		1,311,310	+1,200,490	-	35.5%

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

Month of December 2022					
Country of Origin	Rank	No. of Visitors	Dec-22 vs Dec-21	Share of NSW visitors	Share of AUS
UK	1	35,420	+28,060	14.6%	36.5%
USA	2	34,230	+29,660	14.1%	51.5%
New Zealand	3	29,690	+28,000	12.3%	30.4%
India	4	11,010	+8,150	4.5%	31.3%
Singapore	5	10,320	+5,870	4.3%	26.9%
Top 5 source market TOTAL		120,670	+99,740	49.9%	
NSW		242,050	+204,900	-	37.3%

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

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

In the **month of December 2022**, NSW received 242,050 short-term visitor arrivals, recording an increase on the same month in the previous year (but down 37.7 per cent on December 2019). This month, the State received over half (62 per cent) of the pre-Covid arrivals. The UK regained first place (last time was March 2022 when the border reopened) for the highest number of overseas arrivals to NSW followed by the USA and New Zealand.