

AUSTRALIAN TOURISM: OPEN FOR INVESTMENT

Discover why there's nothing like Australia for tourism investment

www.tourisminvestment.com.au

SIGNIFICANT ECONOMIC PROFILE

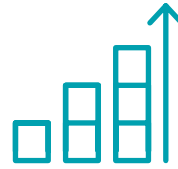
Australia ranks



globally for visitor spend per trip and **9th** globally for tourism receipts.*



Tourism is **one of five** super growth industries driving the future prosperity of Australia.**



Tourism is growing at a rate **3x** faster than the national economy.***



43 cents of every tourism dollar is spent in regional Australia.****

Sources: *United Nations World Tourism Organisation (UNWTO), World Tourism Barometer, October 2017. **Deloitte, Tourism and Hotel Market Outlook, 2017.***Tourism Research Australia (TRA), Tourism Satellite Accounts, 2016-17. **** TRA, State of the Industry, February 2018.

STRONG VISITATION AND SPEND



\$110b Tourism Overnight Spend^{^^}
61% domestic to 39% international share



International

\$42.5b spend (+5%)[^]

CHINA

\$11.3b (+15%)

NZ

\$2.6b (-4%)

USA

\$3.7b (-3%)

JAPAN

\$1.8b (+1%)

UK

\$3.5b (-1%)

VISITORS

9.1m (+6%)^{^^}

NIGHTS

270m (+1%)[^]

Sources: [^]TRA, International Visitor Survey, June 2018; ^{^^}Department of Immigration and Border Protection, Overseas Arrivals and Departures, June 2018.



Domestic[~]

\$88.9b spend (+9%)

OVERNIGHT TRIPS

\$67.5b (+8%)

DAY TRIPS

\$21.4b (+9%)

OVERNIGHT VISITORS

100.3m (+7%)

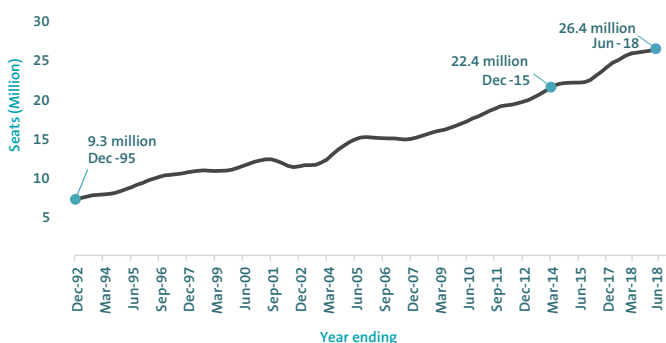
NIGHTS

362m (+4%)

Sources: [~]TRA, National Visitor Survey, June 2018.

SUSTAINED AVIATION GROWTH

International capacity growth to Australia



YOY % change	
2012	3.1%
2013	7.1%
2014	4.8%
2015	1.6%
2016	9.9%
2017	5%
2018	5%

International

60 international airline services to Australia, providing 26.4 million seats (+5%)^{^^^}

Domestic

A total of 61 million passengers (+2.5%) were carried on 78 million (+0.3%) available seats.^{^^^}

Source: ^{^^^}Department of Infrastructure and Regional Development, Aviation Data, June 2018.

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IMPRESSIVE ACCOMMODATION PERFORMANCE

YEAR TO DATE DECEMBER 2018+

Revenue per Available Room
(RevPAR)

AUSTRALIA



\$142.09 (+1.2%)

ADELAIDE

\$124.38 (+1.2%)

BRISBANE

\$111.10 (-3.5%)

CAIRNS

\$124.83 (-1.2%)

CANBERRA AND ACT

\$138.84 (+4.4%)

MELBOURNE

\$152.99 (-%)

PERTH

\$122.07 (-3.5%)

SYDNEY

\$191.42 (-1.9%)

GOLD COAST

\$146.17 (+9.4%)

DARWIN

\$102.57 (-5.8%)

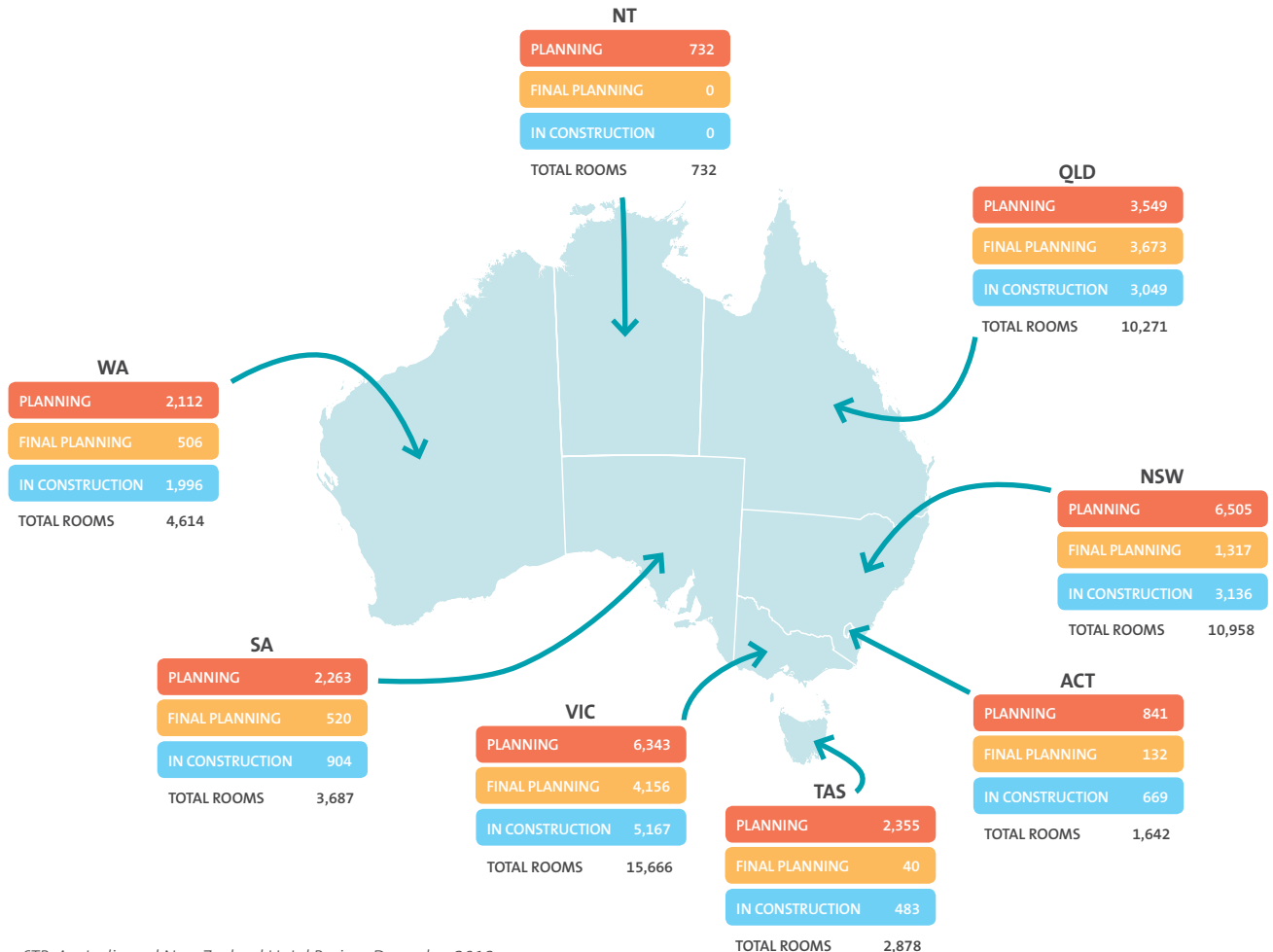
HOBART

\$144.90 (+2.6%)

Sources: +STR, Australia and New Zealand Hotel Review, December 2018.

ROBUST ACCOMMODATION PIPELINE

A total of 50,448 rooms are in the pipeline until 2028, from a total of 294 projects.*



Source: +STR, Australia and New Zealand Hotel Review, December 2018.