

# AUSTRALIAN TOURISM: OPEN FOR INVESTMENT

Discover why there's nothing like Australia for tourism investment

www.tourisminvestment.com.au

## SIGNIFICANT ECONOMIC PROFILE

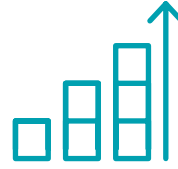
Australia ranks



globally for visitor spend per trip and **7th** 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 2018. \*\*Deloitte, Tourism and Hotel Market Outlook, 2018. \*\*\*Tourism Research Australia (TRA), Tourism Satellite Accounts, 2016-17. \*\*\*\* TRA, State of the Industry, February 2018.

## STRONG VISITATION AND SPEND



**\$118.9b** Tourism Overnight Spend<sup>~</sup>  
63% domestic to 37% international share



**International**

**\$44.3b** spend (+5%)<sup>^</sup>

CHINA

**\$12.0b** (+10%)

NZ

**\$2.6b** (+2%)

USA

**\$4.0b** (+6%)

JAPAN

**\$2.0b** (+11%)

UK

**\$3.3b** (-5%)

VISITORS

**9.3m** (+3%)<sup>^^</sup>

NIGHTS

**271m** (+1%)<sup>^</sup>

Sources: <sup>^</sup>TRA, International Visitor Survey, March 2019; <sup>^^</sup>Department of Immigration and Border Protection, Overseas Arrivals and Departures, May 2019.



**Domestic<sup>~</sup>**

**\$74.5b** spend (+13%)

OVERNIGHT TRIPS

**\$74.5b** (+14%)

DAY TRIPS

**\$23.5b** (+12%)

OVERNIGHT VISITORS

**109m** (+10%)

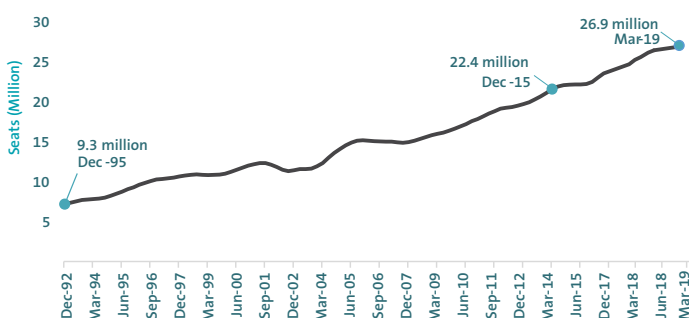
NIGHTS

**386m** (+10%)

Sources: <sup>~</sup>TRA, National Visitor Survey, March 2019.

## 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	4.2%
2019	3.2%

### International

61 international airline services to Australia, providing 26.9 million seats (+3.2%)<sup>^^^</sup>

### Domestic

A total of 61 million passengers (+0.4%) were carried on 78 million (-0.2%) available seats.<sup>^^^</sup>

Source: <sup>^^^</sup>Department of Infrastructure and Regional Development, Aviation Data, March 2019.

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## IMPRESSIVE ACCOMMODATION PERFORMANCE

### YEAR TO DATE JUNE 2019+

Revenue per Available Room (RevPAR)

AUSTRALIA



**\$134.03** (-3.1%)

ADELAIDE

**\$120.92** (-2.4%)

BRISBANE

**\$106.04** (0.6%)

CAIRNS

**\$106.53** (-6.3%)

CANBERRA AND ACT

**\$125.96** (-5.3%)

MELBOURNE

**\$148.72** (-1.9%)

PERTH

**\$114.90** (-4.8%)

SYDNEY

**\$181.72** (-4.9%)

GOLD COAST

**\$129.72** (-9.8%)

DARWIN

**\$76.25** (-17.1%)

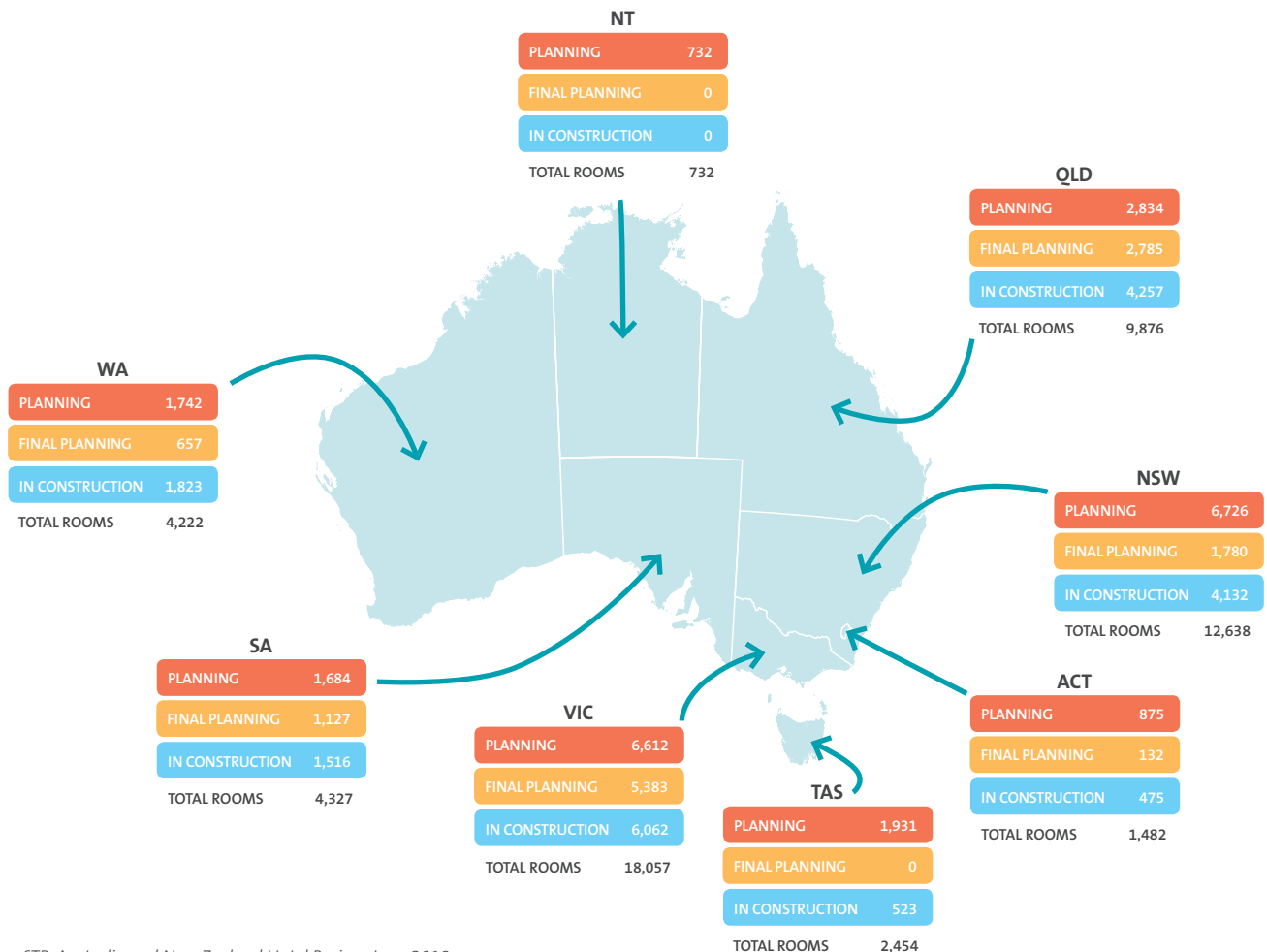
HOBART

**\$159.67** (8.4%)

Sources: +STR, Australia and New Zealand Hotel Review, June 2019.

## ROBUST ACCOMMODATION PIPELINE

A total of 53,788 rooms are in the pipeline until 2028, from a total of 304 projects.\*



Source: +STR, Australia and New Zealand Hotel Review, June 2019.