



Tourism: Towards 2030 Conference

Darwin

Tom Chappel

Business Development, Pacific

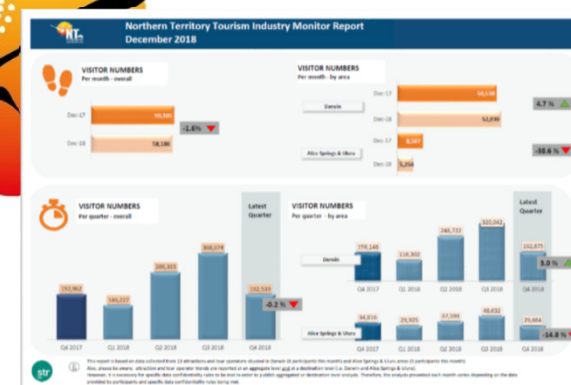
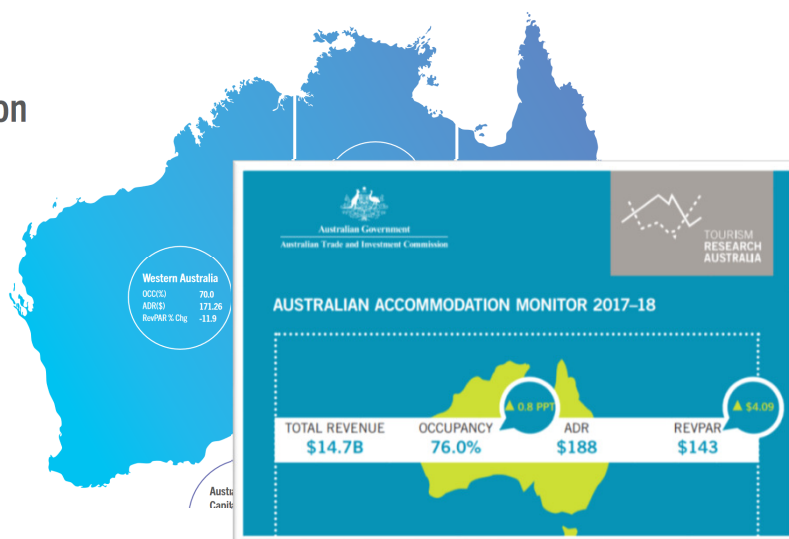
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Australian Accommodation Monitor (AAM)

Click on each territory to view detailed report.





Australia's RevPAR Growth

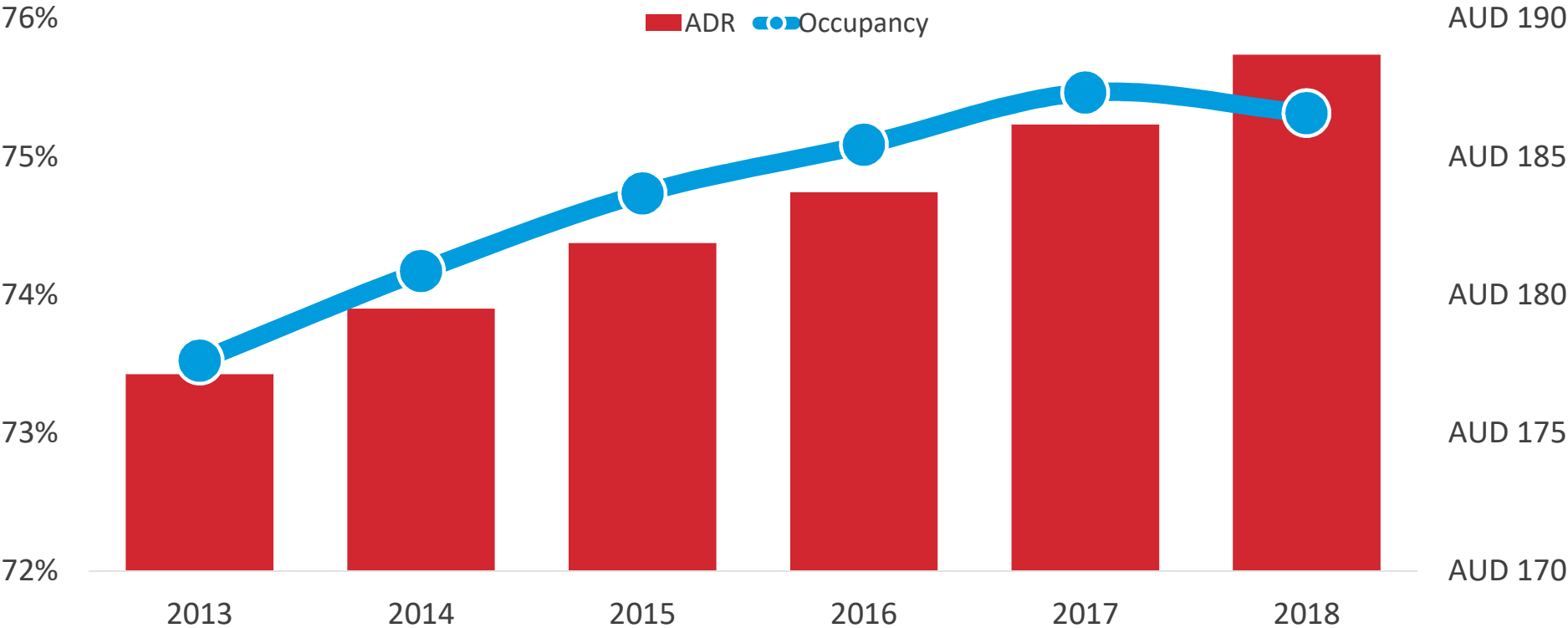
2018 vs 2017

+1.20%

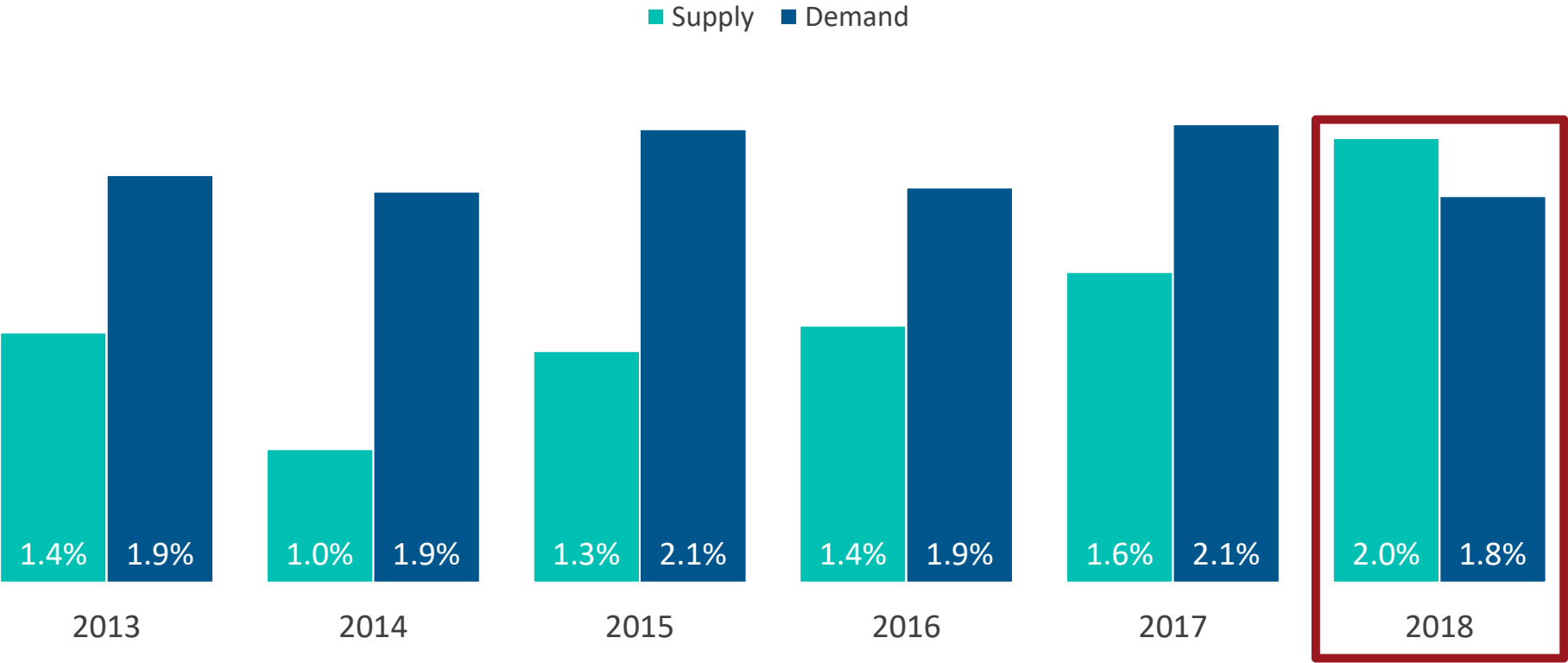
Occupancy declined for the first time since 2012



Total Australia, Occupancy & ADR Performance, FY 2013 – 2018, AUD

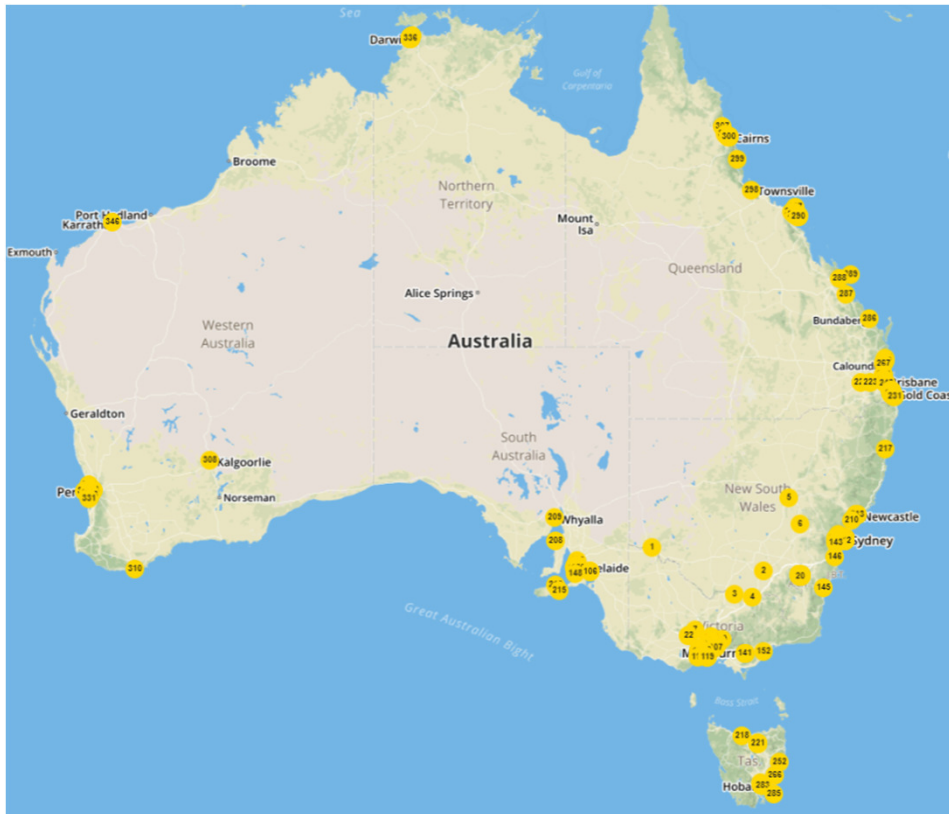


Why? Supply finally tipped demand



Total Australia, Supply & Demand Growth, FY 2013 – 2018

Supply isn't slowing down



50,000

Rooms planned to be built

3rd

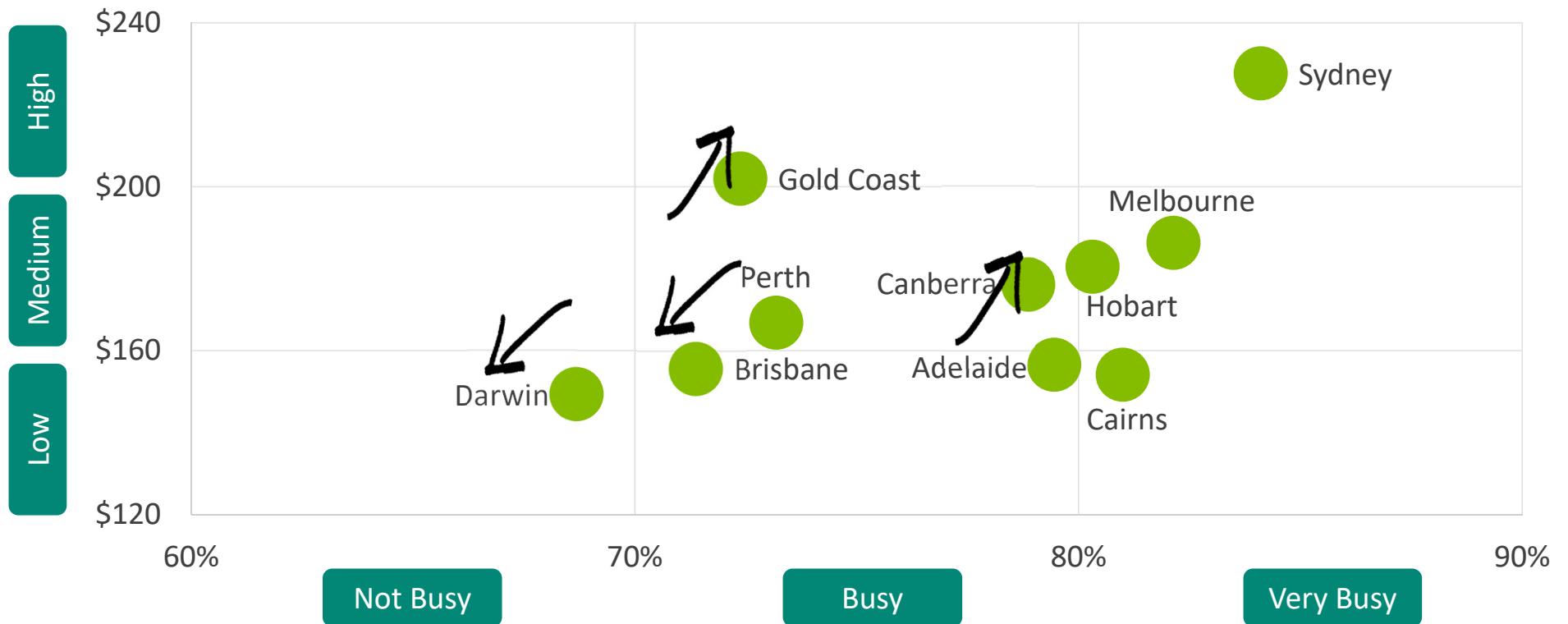
largest pipeline across APAC

16,500

Under Construction

AM:PM by STR – Australia Pipeline

Sydney remains the standout but hasn't pulled away



AU Top 10 Markets, Occupancy & ADR Matrix, FY 2018, AUD

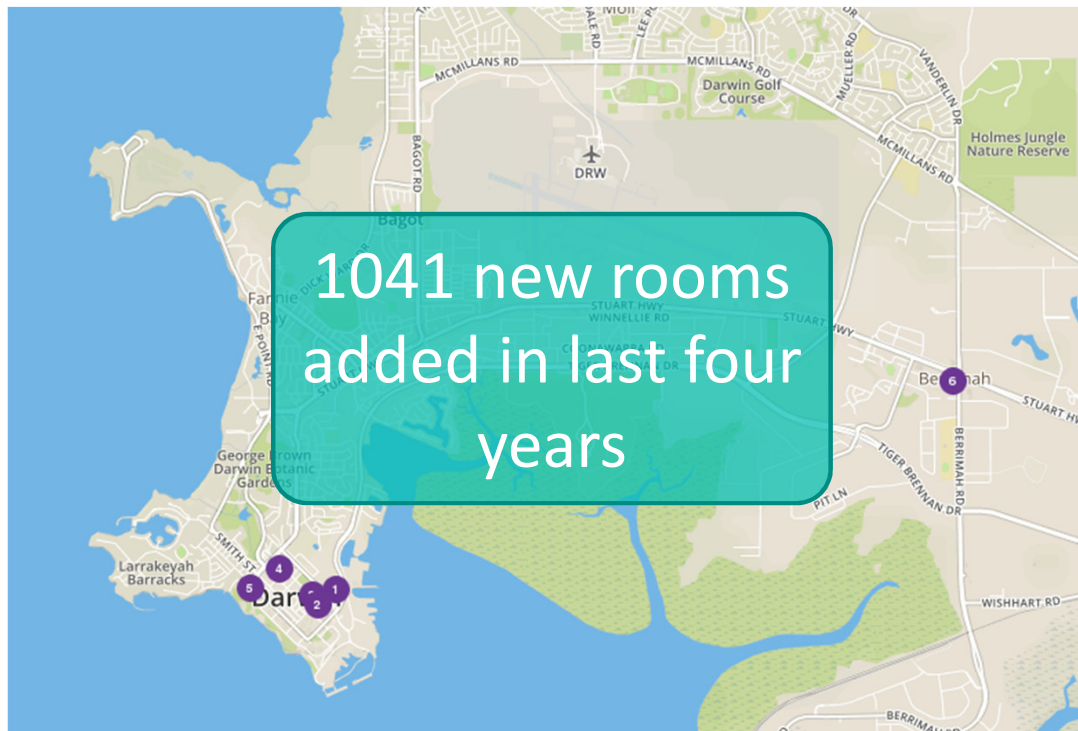
A black and white photograph of a park scene. In the foreground, there is a grassy area with long shadows cast by palm trees. A small pond with a fountain is in the middle ground. In the background, there are several palm trees and a multi-story building. The sky is filled with clouds.

str

Darwin



Darwin supply growth – new construction has started and other projects prospective



54.5%

Upscale

33%

Unbranded

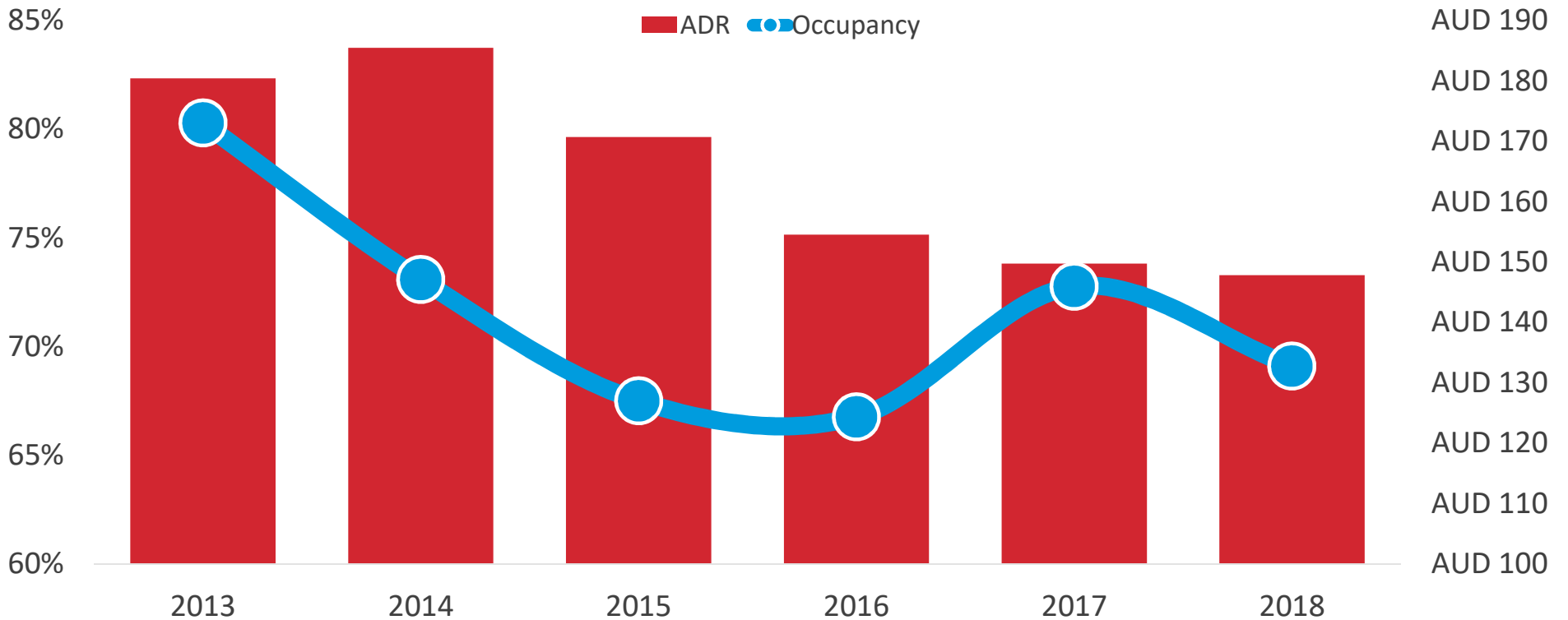
240

Under construction

AM:PM by STR – Darwin new supply 2014 - 2018

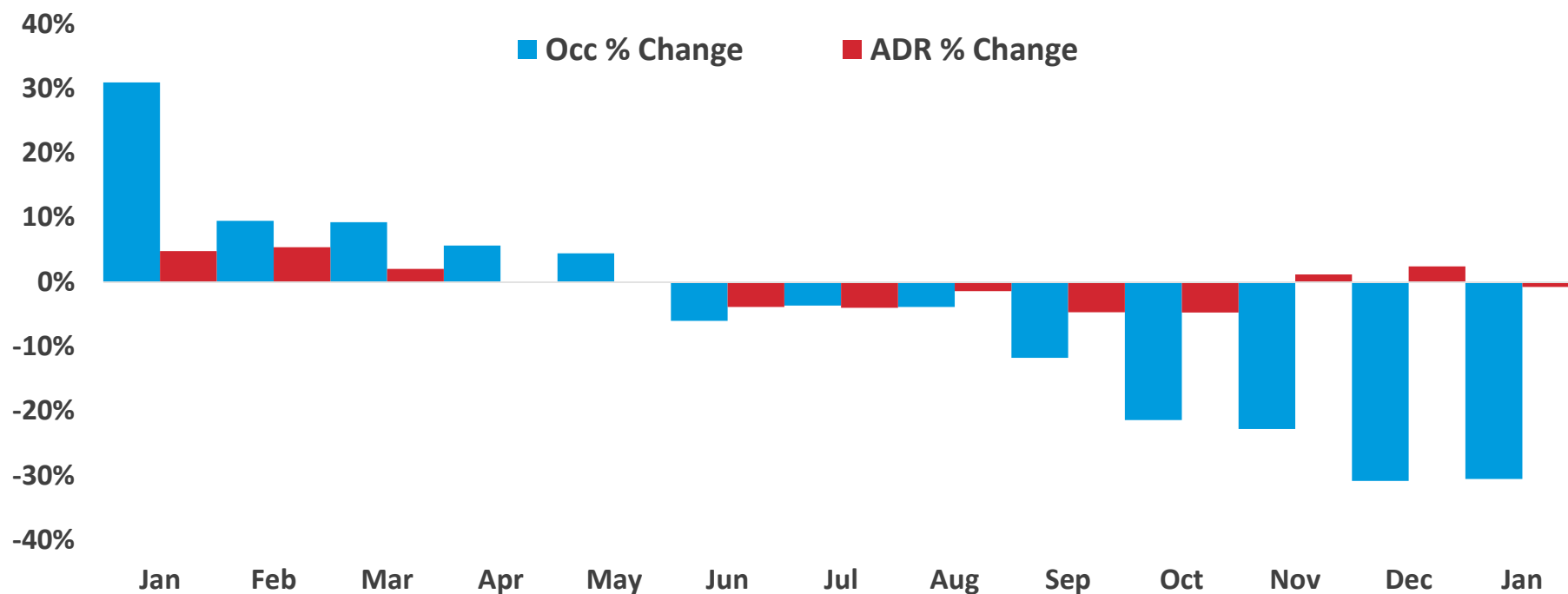
Darwin has been on a ride

Total Australia, Occupancy & ADR Performance, FY 2013 – 2018, AUD



Rate holding on despite large declines in occupancy

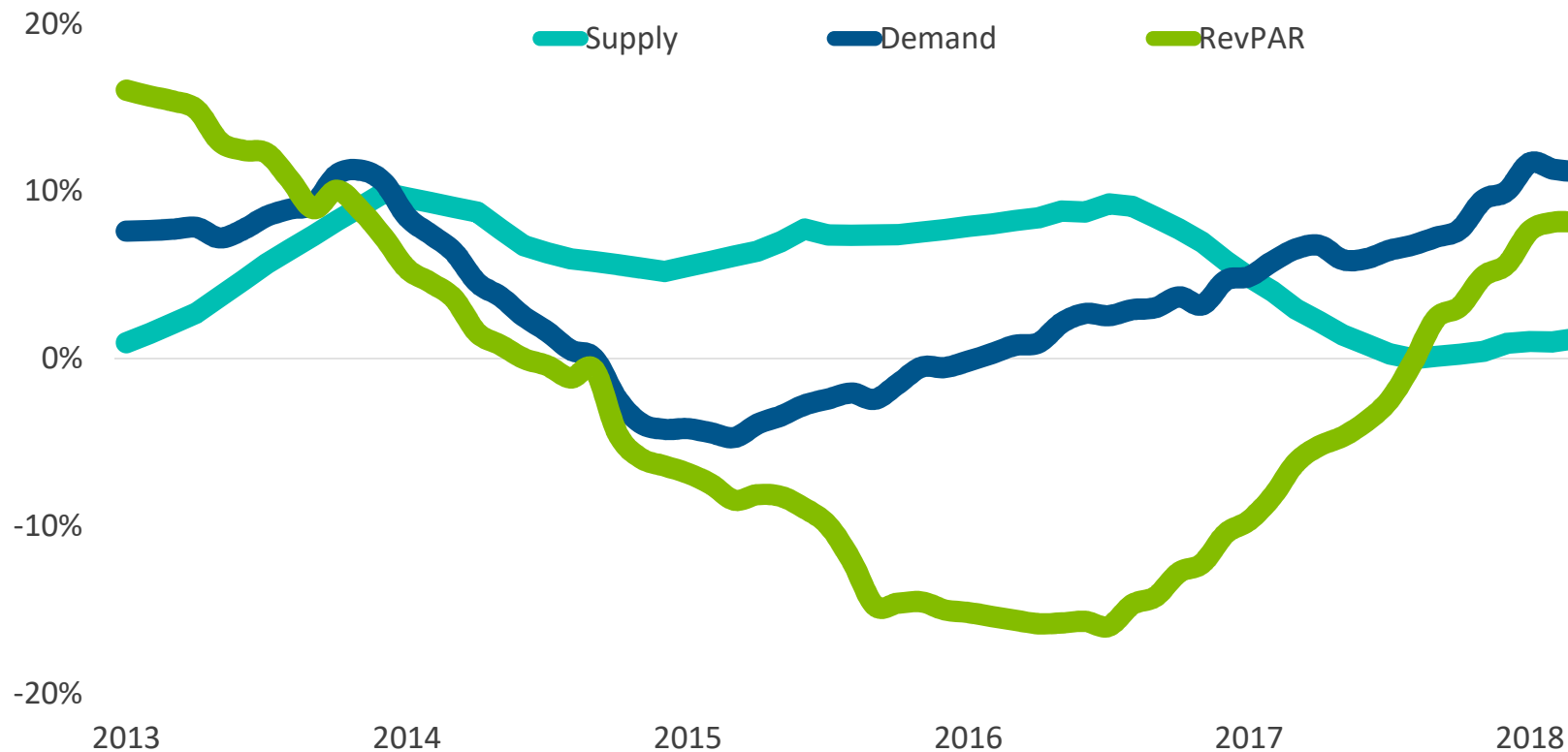
Darwin monthly occupancy & ADR % change, Jan 2018 – Jan 2019



Supply increases, demand changes show big shift in RevPAR

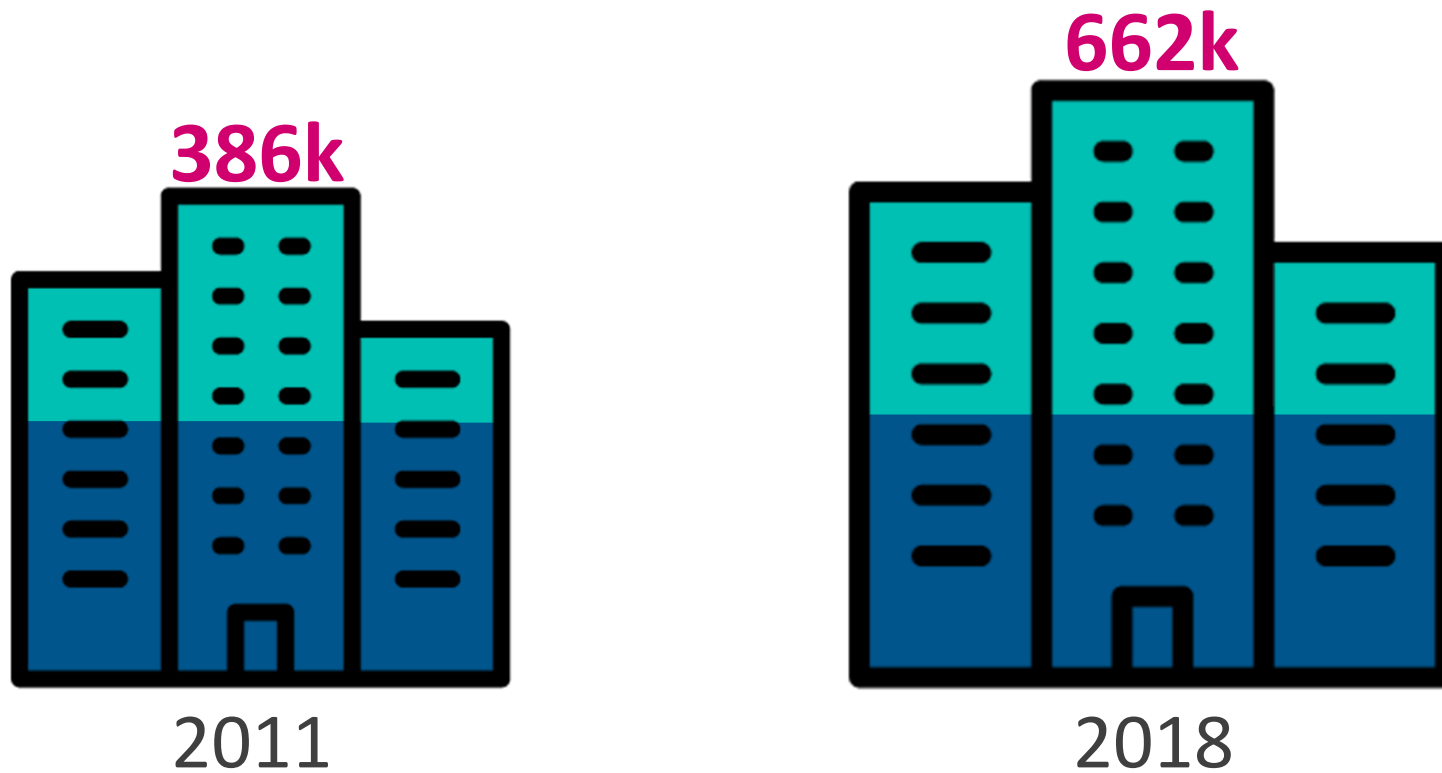
Darwin supply, demand & RevPAR growth

R12 Jan 2013 – Oct 2018, AUD



Darwin supply & demand gap widening

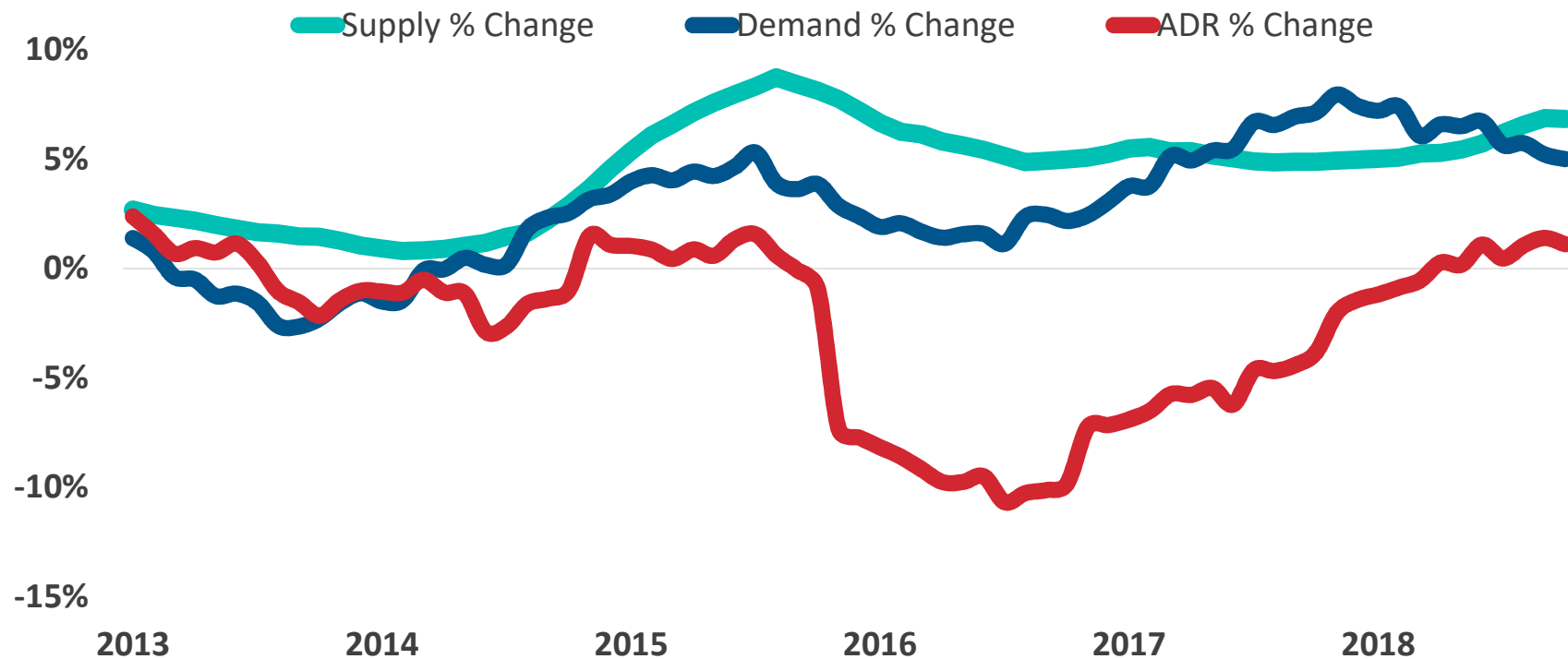
Darwin R12 supply and demand Jan 2011 & Jan 2019



Brisbane: What can we learn from dramatic shifts?

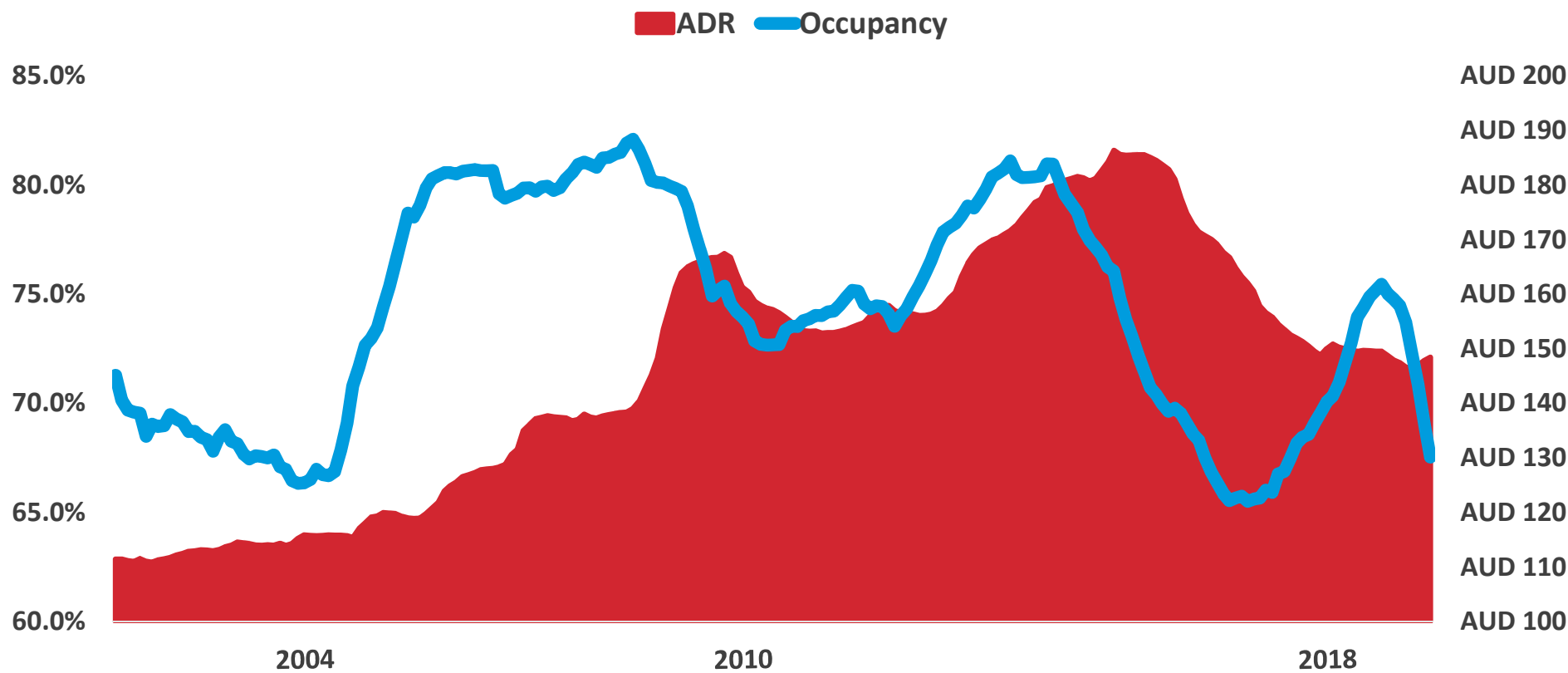


Brisbane, R12 supply, demand and ADR % change



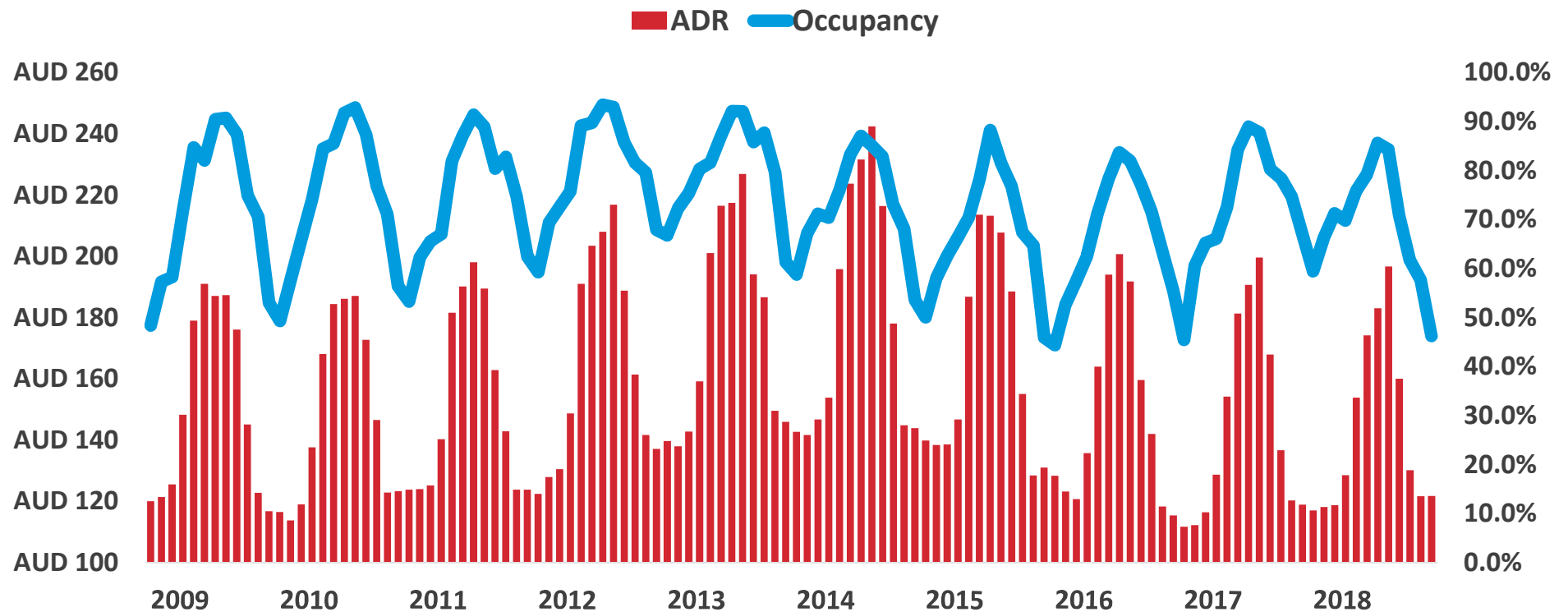
Let's take a look at an even longer perspective

Darwin Occupancy & ADR Performance, Jan 2001 – Jan 2019



Long term history to where we are now

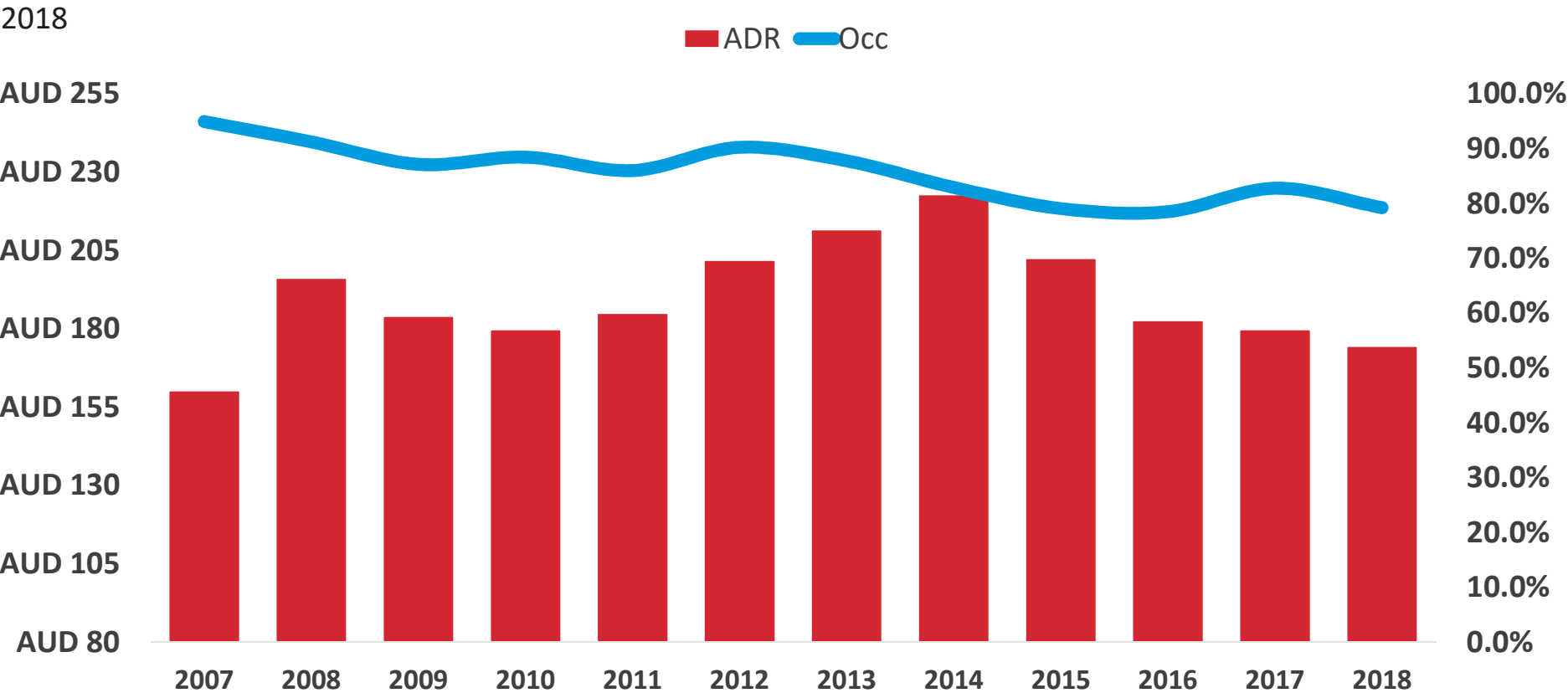
Darwin Occupancy & ADR Performance, 2009 - 2018



Narrowing down, what will happen to high season rate?



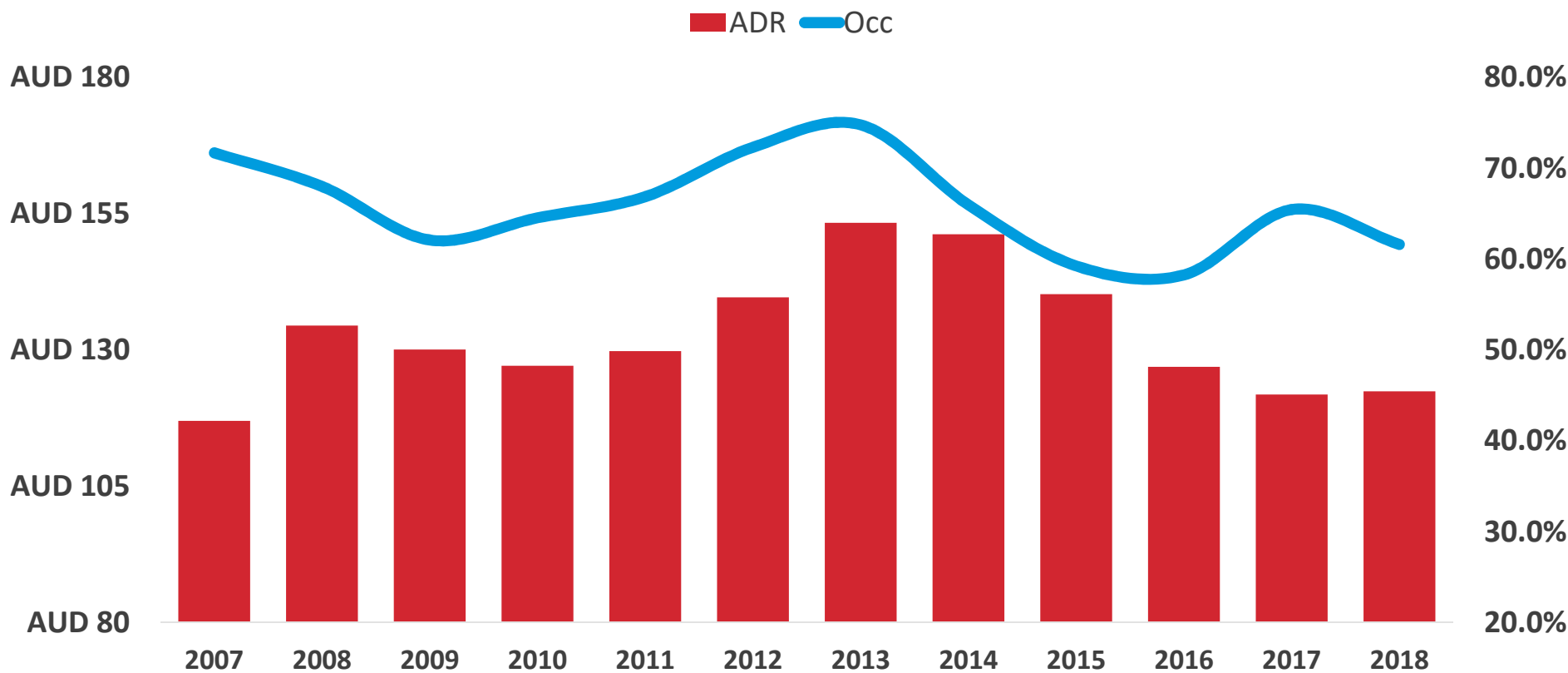
Darwin, ADR & Occupancy Performance, May – September, 2007 - 2018



Narrowing down, what will happen to low season rate?

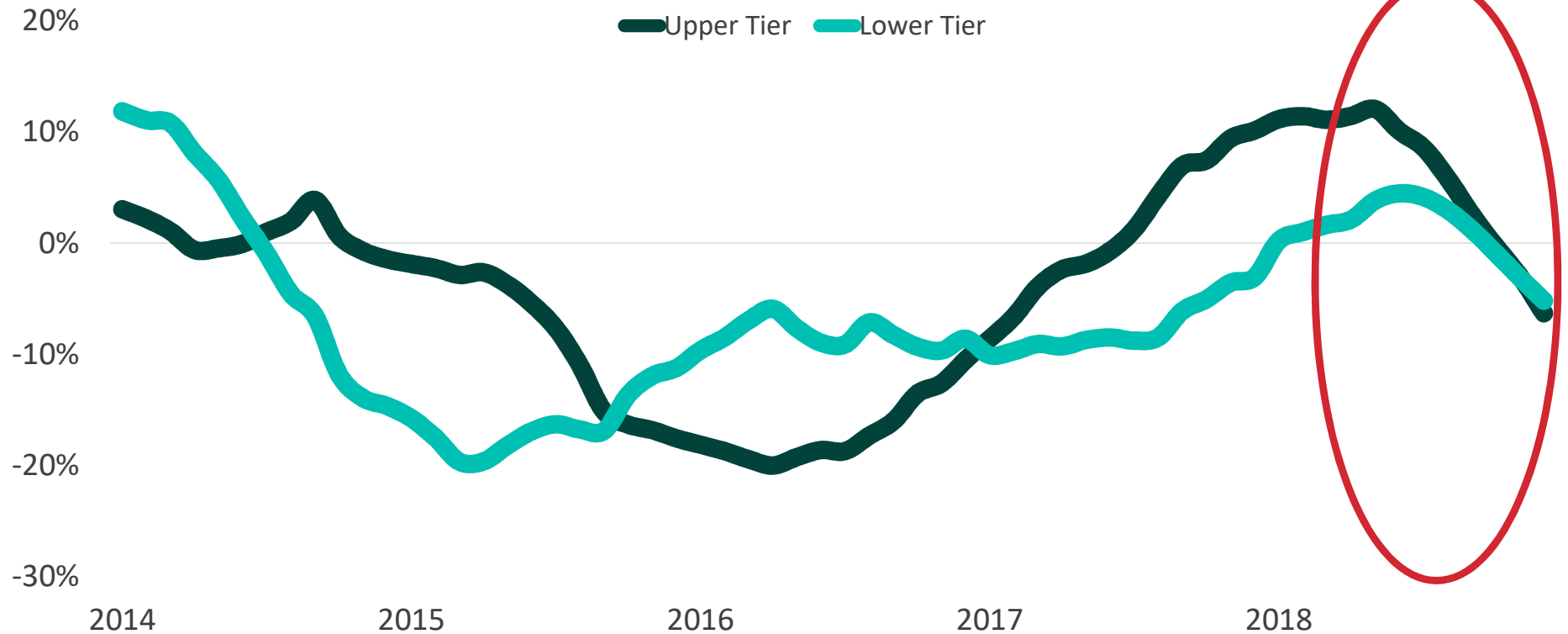


Darwin, ADR & Occupancy Performance, October – April, 2007 - 2018



Demand allowed higher class to perform well

Total Darwin, RevPAR Growth By Tier Class, R12 January 2014 – December 2018, AUD





What impact do events have on accommodation performance?



84.7 -4.3%

\$168 -11.4%

2018 CrownBet Darwin Supercars, Fri – Sun
Occupancy & ADR, 2018 v 2017



88.2 -3.9%

\$181 -5.5%

2018 AFL Premiership Season, Round 16, Fri –
Sun, Occupancy & ADR 2018 v 2017



Solid performance relative to other markets

Selected Markets, Event Dates, Daily Occupancy & Average Rate, 2018



Cairns



Ballarat

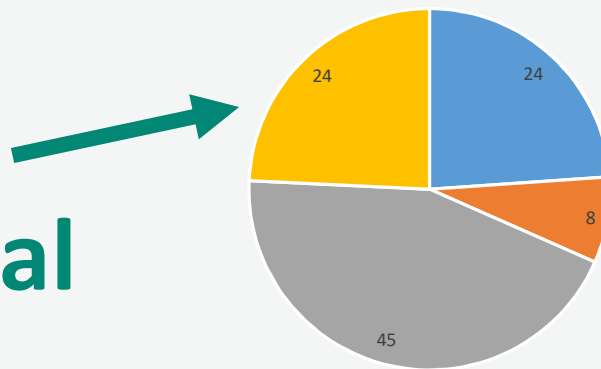


Northern Territory Tourism Industry Monitor Report

2018 in Review

Origin of visitors in the Northern Territory in 2018 (%)

24%
International



■ Local ■ Elsewhere in NT ■ Rest of Australia ■ International



Northern Territory Tourism Industry Monitor Report

2018 in Review

Visitor origins by quarter in the Northern Territories (%)



Positive opportunity, even in high season



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SI



The inaugural Donghai airlines flight arrives in Darwin from Shenzhen, China, greeted by a cannon salute. Picture: Justin Kennedy

BUSINESS

NT's newest international airline, Donghai Airlines, touches down in Darwin

DARWIN WELCOMES FIRST CHINA FLIGHT



TRAVEL

Jetstar's Darwin to Singapore cut price airfare bonanza



Jetstar's Darwin to Singapore in April and travellers are in for a



**Alice Springs RevPAR
Growth
During Uluru peak season
+5.6% YOY**



**Darwin's RevPAR
Growth
During Kakadu peak season
-3.5% YOY**

How can you access this information?



Your new business tool,
100% free of charge.

Hotel Survey Report

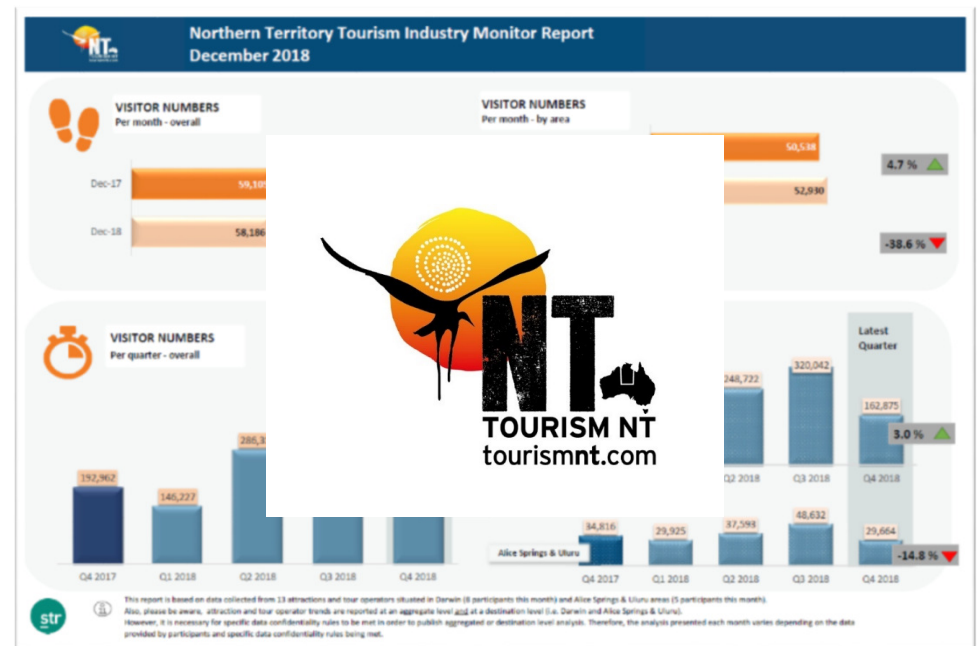
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Get in touch

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Benchmarking

is a fundamental practice for any accommodation provider. By gaining a clearer picture of your property's performance in relation to your competitors in your local market, you can better focus on which areas you need to work on to drive greater market share and increase your property's value and profits.





Thank You!

Tom Chappel



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