AUSTRALIA 2020 ANNUAL RESEARCH: KEY HIGHLIGHTS

GLOBAL DATA 2019

10.3% Total GDP contribution

330MN Jobs globally (1 in 10 jobs)

While the global economy grew by 2.5%, Travel & Tourism grew significantly more at 3.5%

1 in 4 net new jobs were created by Travel & Tourism over the last five years

Global GDP impact by sector (2018 data). Share of total economy GDP

<table>
<thead>
<tr>
<th>Sector</th>
<th>Share of Total Economy GDP</th>
</tr>
</thead>
<tbody>
<tr>
<td>Mining</td>
<td>0%</td>
</tr>
<tr>
<td>Automotive</td>
<td>5%</td>
</tr>
<tr>
<td>Agriculture</td>
<td>10%</td>
</tr>
<tr>
<td>Travel &amp; Tourism</td>
<td>15%</td>
</tr>
<tr>
<td>Retail</td>
<td>15%</td>
</tr>
<tr>
<td>Financial Services</td>
<td>20%</td>
</tr>
</tbody>
</table>

AUSTRALIA 2019 KEY DATA

CONTRIBUTION OF TRAVEL & TOURISM TO GDP

10.8% OF TOTAL ECONOMY
Total T&T GDP = AUD215.4BN (USD149.7BN)

+0.8%
2019 Travel & Tourism GDP growth vs +1.8% real economy GDP growth

CONTRIBUTION OF TRAVEL & TOURISM TO EMPLOYMENT

1,653.6 JOBS (000's)
(12.8% of total employment)

INTERNATIONAL VISITOR IMPACT

AUD31.6BN in visitor spend (6.4% of total exports) (USD22.0BN)

INBOUND ARRIVALS

1. NEW ZEALAND 15%
2. CHINA 15%
3. UNITED STATES 9%
4. UNITED KINGDOM 8%
5. SINGAPORE 5%
REST OF WORLD 48%

OUTBOUND DEPARTURES

1. INDONESIA 9%
2. NEW ZEALAND 9%
3. UNITED STATES 8%
4. UNITED KINGDOM 6%
5. ITALY 5%
REST OF WORLD 63%

SECTOR CHARACTERISTICS (2019)

<table>
<thead>
<tr>
<th>Sector</th>
<th>Leasure Spending</th>
<th>Business Spending</th>
<th>Domestic Spending</th>
<th>International Spending</th>
</tr>
</thead>
<tbody>
<tr>
<td>TOTAL</td>
<td>83%</td>
<td>17%</td>
<td>78%</td>
<td>22%</td>
</tr>
</tbody>
</table>

Note: Data are average shares over the 2016-2018 period
Source: Oxford Economics, national sources and UNWTO

1 All values are in constant 2019 prices & exchange rates
As reported in March 2020