CONFIDENTIAL ADVISORY REPORT

Country Report - Australia

ATLAS DECISION INTELLIGENCE

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1. Executive Summary

Australia presents a high-income, urbanised, and steadily growing demand base for attractions and entertainment, with tourism indicators trending upward and a visible pipeline of destination investments. World Bank WDI places GDP at USD 1.799 trillion in 2025 and GDP per capita at USD 65,130; OECD's PPP income proxy at USD 56,018.8 per person (2023) supports discretionary spend capacity, although operators face elevated labour and compliance costs. Population reached 27.6-27.8 million in 2025 with 1.53% growth and an 87.72% urban share, concentrating demand in major metros.

Tourism Research Australia (TRA) reports 8.5 million international trips in the year ending March 2026, with spend in Australia at AUD 40.9 billion and 321.9 million international nights. Domestic overnight activity is substantial: 113.1 million trips and AUD 107.6 billion spend (YE Mar 2026). The change to TRA's Domestic Tourism Statistics (from January 2025) improves timeliness but limits strict comparability with pre-2025 series.

Supply is anchored by nationally significant park clusters (Gold Coast), robust zoo networks (ZAA-accredited institutions counted at 74) and a small but material set of public aquariums (6 operating). Adult one-day ticket benchmarks range from AUD 37 (AQWA) to AUD 114 (Movie World/Sea World flexible day). Attendance signals are strong: VRTP exceeded 4,000,000 guests in FY2023-24; Zoos Victoria recorded 2,770,000; Perth Zoo reported a record 804,763.

The project pipeline features city-shaping precincts and cultural infrastructure: Queen's Wharf Brisbane (~AUD 3.6 billion, staged opening since 2024), the New Sydney Fish Market (AUD 836 million, opened Jan 19, 2026), MAPT (AUD 1.7 billion program), and the Australian War Memorial development (~AUD 498.7 million). Near-term opportunities are led by recovering internationals, resilient domestic day trips, and digital payments ubiquity. Key risks include labour cost inflation, privacy/UCT enforcement, extreme weather, and Sydney air access caps-necessitating pricing, scheduling, and resilience strategies.

Recommended actions: calibrate pricing to dynamic demand; prioritize metro catchments and Gold Coast synergies; harden operations for heat/smoke; leverage digital ticketing, memberships and authorised resale; and stage capital to align with tourism growth windows.

2. Country Overview

Demand is structurally underpinned by a large urban consumer base, high incomes, and diversified tourism. WDI places Australia's 2025 population at 27,614,411 with 1.53% growth and an 87.72% urban share. These settings favour metro-centric offers-icons, cultural precincts, and family attractions positioned within 1-3 hours' drive of capitals. The population trend chart shows steady growth from 2019 through the 31 Dec 2025 ERP, with net overseas migration a key driver per ABS context.

International visitation recovery is material for gateway cities. TRA's line charts illustrate step-ups from 7.6 million (YE Dec 2024) to 8.5 million (YE Mar 2026); spend in Australia rose faster (AUD 32.9 to 40.9 billion), implying stronger per-trip monetisation and/or length of stay, consistent with 321.9 million international nights. For operators, this supports premium bundles and IP-led product while sustaining value-led tiers for price-sensitive segments.

Domestic travel remains the bedrock. Under TRA's new DoTS, 2025 day trips and spend increased, and YE Mar 2026 domestic overnights reached 113.1 million trips with AUD 107.6 billion spend. Given the series change, trend use should remain within post-2025 windows for planning. Day-trip momentum strengthens nearby parks, FEC-style experiences, wildlife encounters, and museums with blockbuster programming.

Supply patterns: the Gold Coast remains Australia's most concentrated multi-park destination (VRTP portfolio; Dreamworld/WhiteWater World/SkyPoint), supported by state-wide zoo/wildlife coverage (74 ZAA-accredited institutions) and six operating public aquariums. Adult ticket benchmarks range widely (AUD 37-114), creating scope for yield management.

Policy and operating context: GST at 10%, company tax 30% (25% for qualifying base rate entities), National Minimum Wage AUD 26.44/hour from July 1, 2026. Payments are predominantly electronic; 5G rollout supports mobile-first ticketing. Constraints include Sydney Airport slot/curfew limits and increasing climate-linked heat/fire risk-both with programming and resilience implications.

3. Executive Country Indicators

World Development Indicators report a population of 27.61 million in 2025, population growth of 1.53%, an urban population share of 87.72%, GDP of USD 1.799 trillion and GDP per capita of USD 65,130. Germany is therefore a large, highly urbanised, high-income market with broadly stable population scale.

Decision implication: near-flat population growth increases the importance of share capture, repeat visitation, tourism conversion and differentiated concepts. Current-USD movements reflect exchange rates as well as domestic performance.

Executive Country Indicators

Indicator	Latest value	Period	Source
Population	27,614,411	2025	World Bank WDI
Population growth	1.53%	2025	World Bank WDI
Urban population share	87.72%	2025	World Bank WDI
GDP	USD 1.799 trillion	2025	World Bank WDI
GDP per capita	USD 65,130	2025	World Bank WDI

Latest World Development Indicators; monetary values are current USD.