



Crown's National Economic Contribution

Prepared by Mandala

April 2024

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This document is intended for general informational purposes only. The analysis in this report was commissioned by Crown Resorts and prepared by Mandala.

Mandala is a research firm with offices in Melbourne, Canberra, and Sydney. Mandala specialises in combining cutting-edge data and advanced analytical techniques to generate new insights and fresh perspectives on the challenges facing businesses and government.

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Executive summary

Crown Resorts is the owner and operator of Australia's leading integrated resorts and one of the nation's largest entertainment and hospitality providers.

Crown operates integrated resorts in Melbourne, Perth and Sydney, training, employing and providing careers for thousands of Australians directly at its iconic resorts, as well as indirectly to small, medium and large businesses across its supply chain.

The economic contribution Crown makes to local, state and national economies is considerable, with \$4.8 billion added to Australia's Gross Value Added (GVA) annually.

Crown is one of the highest taxpayers in the hospitality industry and spends approximately \$1 billion annually in a diverse network of suppliers in every state and territory in Australia. Importantly, 83% of these suppliers are Small and Medium Enterprises (SMEs).

Crown is a significant tourism asset and welcomes more visitors than the iconic landmarks of the Melbourne Cricket Ground, Sydney Opera House, and Optus Stadium in Perth combined.

Crown is also a key partner in Australia's major events program. By sponsoring and supporting major international events, Crown further enhances the nation's appeal as a premier tourist destination.

Crown operates three casinos with world leading innovative responsible gaming and Anti-Money Laundering/Counter-Terrorism Financing (AML/CTF) measures, providing visitors with Australia's safest and most enjoyable gaming experience.

In the community, Crown is an active supporter of community and philanthropic causes ranging from disaster relief, homelessness, health and medical research and first responders.



Crown drives economic growth, provides jobs and training, is an industry leader in tourism and supports communities

Drives economic growth



Economic activity

- **\$4.8 billion economic contribution**, made up of \$2.0 billion direct, \$2.2 billion indirect and \$600 million to other Australian businesses through guest spending



Supplier

- **3,900 suppliers in all states and territories**, with 83% SMEs
- **Over \$1 billion annually in supplier spending**

Provides jobs and training



Jobs

- **Largest hospitality employer in Australia**
- Supports almost **30,000 jobs through Crown venues** and its **supply chain**



Training

- Trains **1 in 10 Certificate III hospitality graduates** in Crown's home states

Leading tourism provider



Tourism attraction

- **3 award-winning integrated resorts**
- **36 million visits**, more than the Opera House, MCG, and Optus Stadium combined



Premier events offering

- Partner of the **Taylor Swift Eras Tour**, **Australian Open Golf**, and **Australian Open Tennis**, and attracts almost 1.2 million visitors to award winning shows and events

Supports communities



Tax revenue

- **\$527 million taxes** in FY23
- Equivalent to salaries of an additional **6,700 teachers** or **7,500 nurses**



Giving back

- **Community support by partnering with over 100 organisations** across Australia



01	Crown contributes \$4.8b to Australia’s local, state and national economies and communities	
02	Crown is the largest hospitality employer in Australia, and is one of the largest hospitality training providers in Australia	
03	Crown is Australia’s leading tourism provider, attracting millions of visitors every year	
04	Crown supports the community through its significant tax contributions, and through its philanthropic activity	
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Crown contributes \$4.8b in gross value added to the Australian economy

In FY23, Crown contributed \$4.8 billion in Gross Value Added (GVA).¹ This was made up of \$2.0 billion in direct activity, \$2.2 billion in indirect activity, and \$600 million through its visitors.

Crown's \$2.0 billion direct contribution represents the additional value added to the economy through its resort operations. This includes hotel accommodations, restaurants and bars, various events at Crown's venues, and gaming operations. The direct contribution represents the value to the economy created by labour and capital inputs, employed directly by the resorts (i.e., EBITDA plus wages).

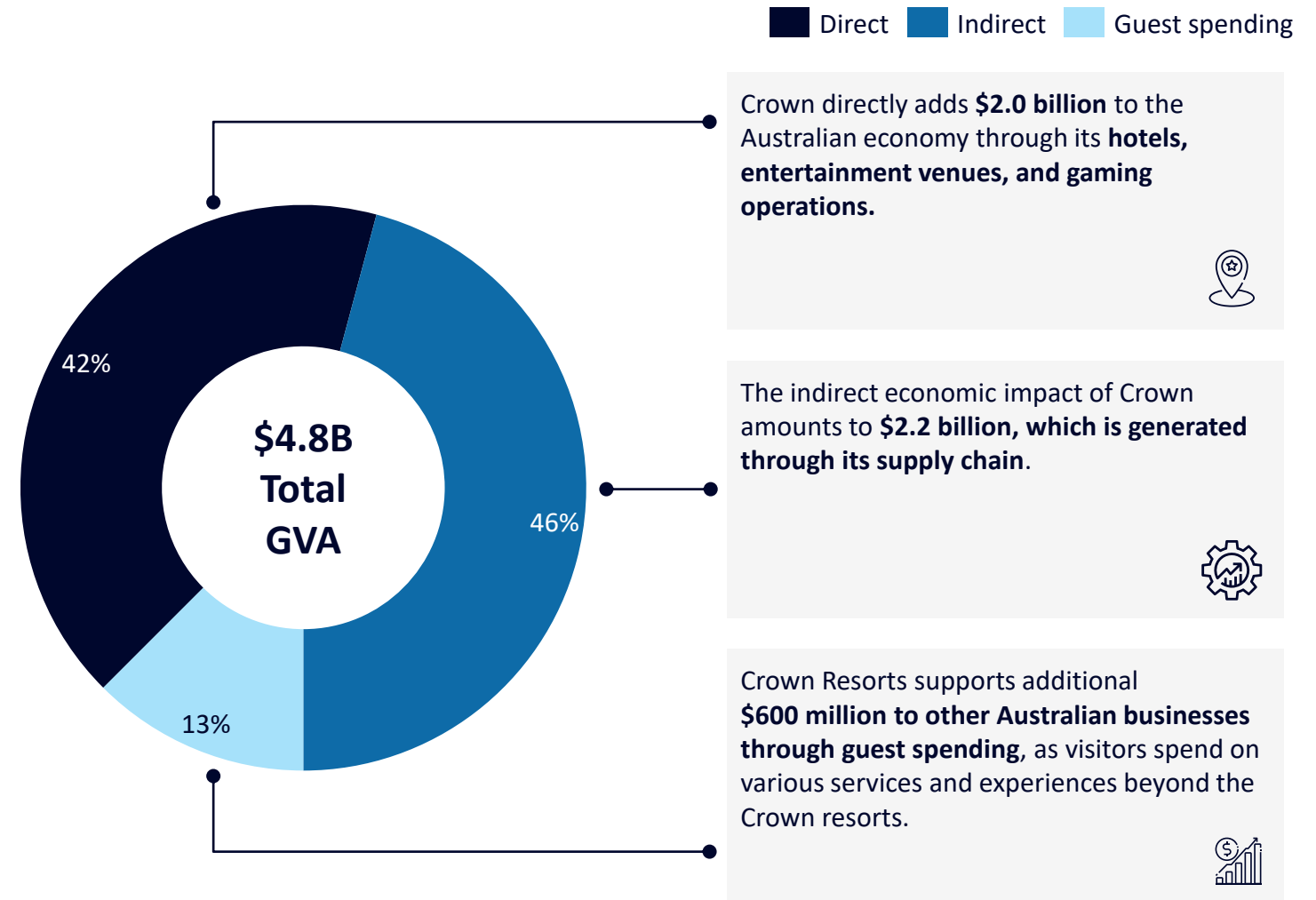
Crown also supports an additional \$2.2 billion through indirect economic impact. This is reflected through Crown's expenditure across other Australian businesses.

The indirect impact is estimated using input-output multipliers for each resort operation: Restaurants and bars, hotels and events, and gaming operations.

Furthermore, Crown supported an extra \$600 million in GVA to other Australian businesses through guests' spending. Annually, 1.4 million tourists² visit Crown's venues, and their expenditure contributes to turnover in other Australian businesses. This contribution is assessed by applying the average tourist spending profile in Australia to the GVA to turnover ratio.

Crown's economic impact in Australia

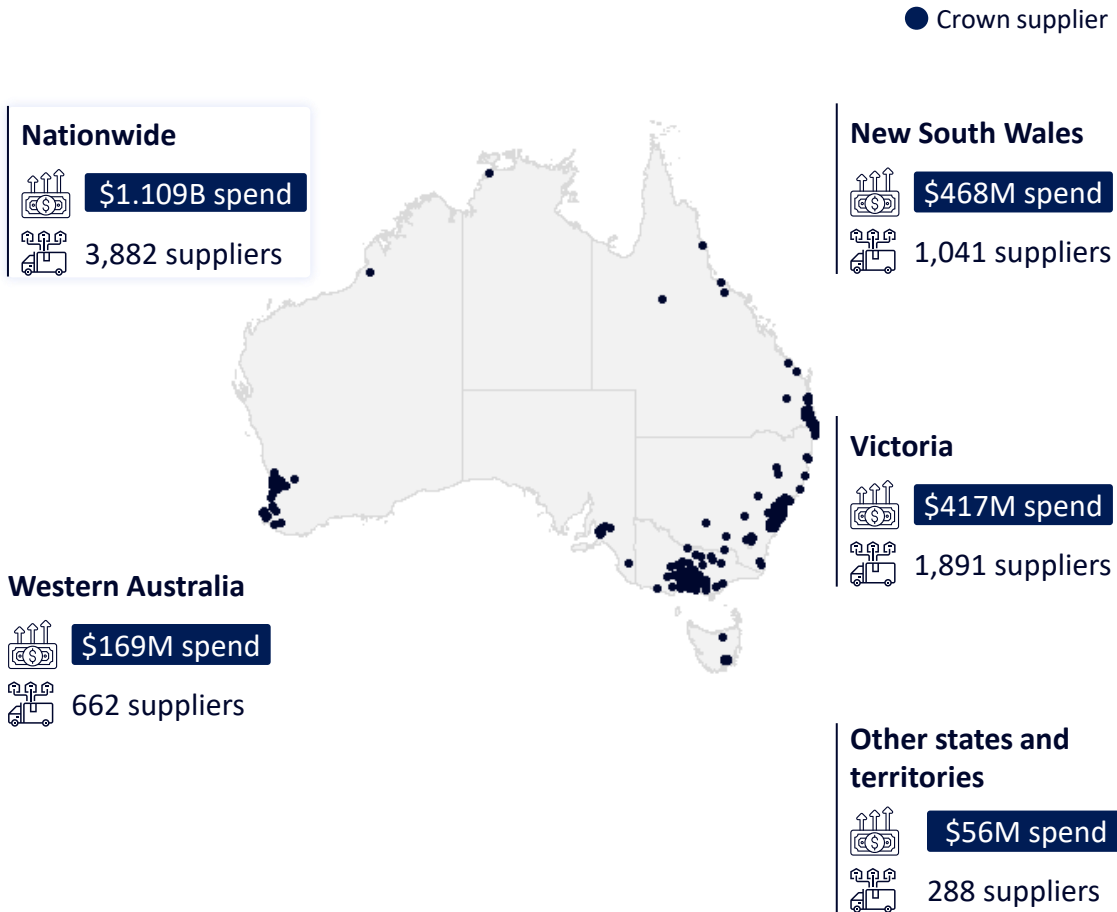
\$AU; GVA; FY23



Notes: 1 – GVA analysis includes Crown Resorts and Betfair economic activity. 2 – The term 'tourists' refers to the number of guests staying at hotels, calculated from the total number of room bookings.
Sources: Crown; ABS (2023); Mandala Analysis

Crown spends over \$1b per year with 3,900 suppliers across Australia...

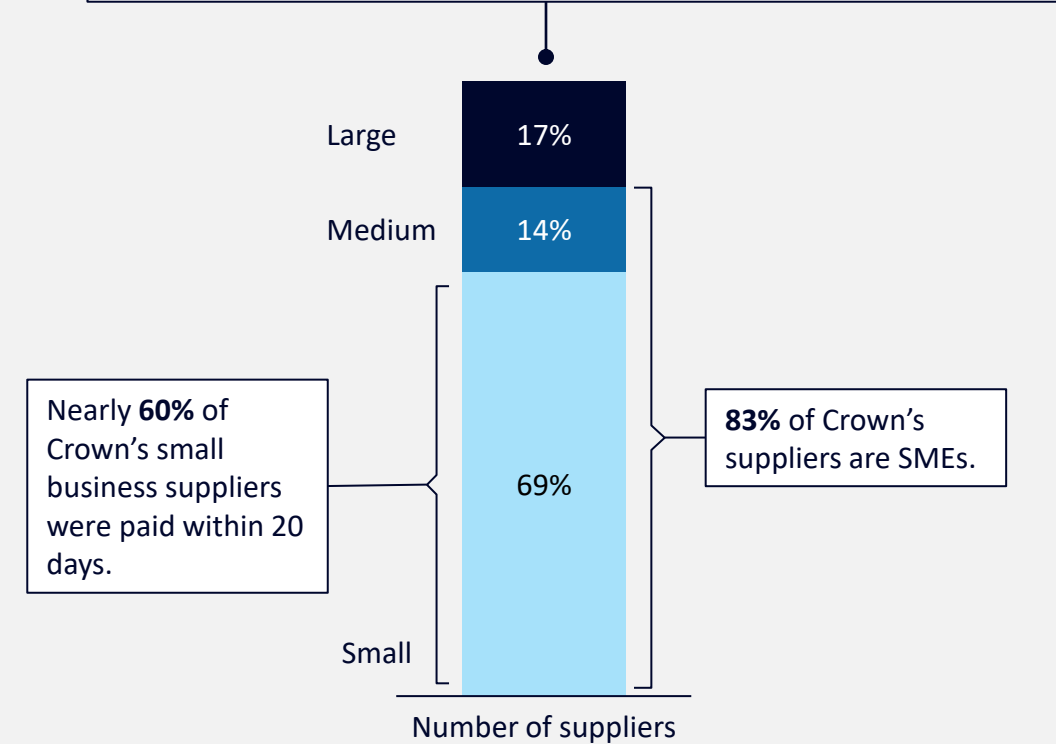
Location of supplier and Crown's¹ spending by state and territory
\$AU; FY23



...with small and medium businesses making up more than 80% of its supplier network

Total number of suppliers by business size
Supplier count,¹ FY23

In FY23, Crown spent over \$460 million with Australian small and medium businesses, supporting local and national industries including agriculture, manufacturing, technology, and software.



Sources: Crown; ABS (2023); Mandala analysis. Notes 1 – Supplier count and expenditure captures Crown and Betfair's supply chains.

Note: 'Small' suppliers are identified as those employing fewer than 20 individuals, 'Medium' suppliers employ between 20 and 199 employees, and 'Large' suppliers are characterised by an employee count of 200 or more. 1 – Betfair not included in SME analysis due to data availability. Sources: Crown; Mandala analysis; Payment Times Report Register, Australian Government

Crown has partnered with TastyOne for over 10 years, helping to grow a family-run business that supports farmers across Australia

“Crown is one of our top customers and we deliver to them daily. The partnership with Crown means we bring the freshest produce from Aussie farmers to Crown to serve at their restaurants.”

“Our partnership also mean we have been able to hire additional staff and provide certainty to family-owned farms from Gippsland in Victoria to Finley in NSW and Lancelin in Western Australia.”

— Michael Santalucia, TastyOne

Crown has sourced produce from TastyOne for over a decade, playing a critical role in helping to build their capabilities and support the regions and agricultural sector.

Michael Santalucia founded Bute Chips in 1983 supplying potato chips to shops in the western suburbs of Melbourne. As it expanded it was renamed TastyOne and continues as a family-run business employing over 150 people.

TastyOne sources 100% locally grown fresh produce from 50+ farms across regional Australia, with many farms working with them for over 30 years.

TastyOne also enables communication between regional farms and Crown, helping farms adjust their produce types and provide Crown with ‘ugly veg’ which would otherwise go to waste.



Michael Santalucia

Founder, TastyOne

📍 Melbourne, Australia

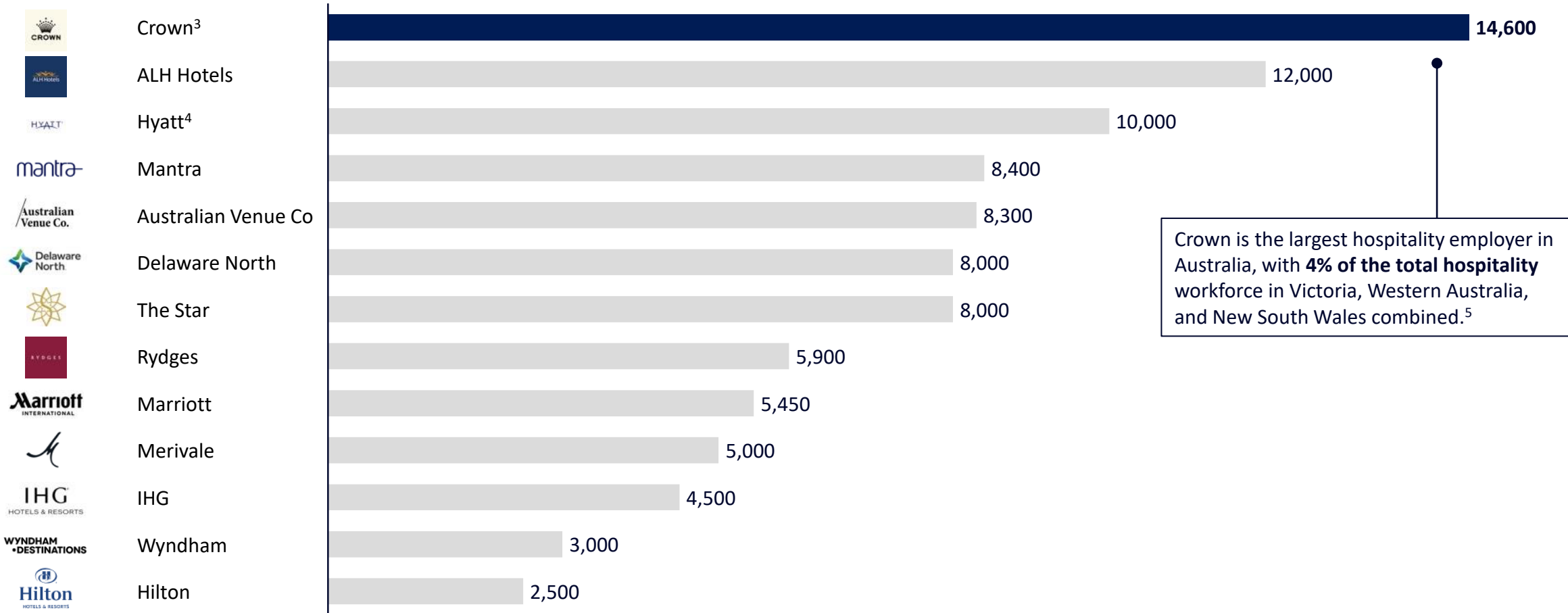


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Crown is the largest hospitality employer in Australia

Employees of the largest hospitality employers

Number of Australian jobs, hospitality industry including food and beverage and hotels^{1,2}



Crown is the largest hospitality employer in Australia, with **4% of the total hospitality workforce** in Victoria, Western Australia, and New South Wales combined.⁵

Notes: 1 – Excludes employers in facilities services, takeaway, and cafes. 2 – Employee numbers from various sources. Mandala has made every effort to ensure their comparability, however some discrepancies may exist. 3 – Crown headcount. FTEs (Full-Time Equivalents) also provided in the report. Excluded from this analysis is Betfair’s 100 employees, for comparability. 4 – Approximate based on LinkedIn estimate. 5 – Accommodation, food and beverage, and gaming workforce as of the 2021 census, excluding takeaway and catering services. Sources: Crown; ABS 2021 Census Industry of Employment; AFR (2023); ALH Group (n.d.); Hyatt LinkedIn (n.d.); Australian Venue Co (n.d.); IBISWorld (2023); The Star (n.d.); Mantra LinkedIn (n.d.); Marriott (n.d.); Merivale LinkedIn (2023); AFR (2021); Rydges LinkedIn (n.d.); Wyndham (n.d.); Hilton (2023); WGEA (n.d.); Mandala analysis.

Crown supports almost 30,000 jobs both directly and through supply chain activity

Crown provides 24,000 onsite job opportunities within its venues and supports 5,400 additional offsite jobs nationally.

Onsite jobs include the 14,700 people directly employed by Crown and 8,300 additional people sub-contracted to work at Crown's venues. An extra 1,000 people work at Crown's 60 tenancies, such as retail stores and entertainment venues across the properties.

As well as the jobs at Crown venues, Crown supports another 5,400 jobs around the nation.

These are roles that are created as a result of Crown's spending in the economy, at businesses spanning from food and beverage suppliers, to maintenance and technology providers.

Almost half the jobs supported by Crown (47%) are in Victoria, with 12,600 onsite. New South Wales has the greatest number of offsite jobs (1,500), as it is home to many of Crown's suppliers.

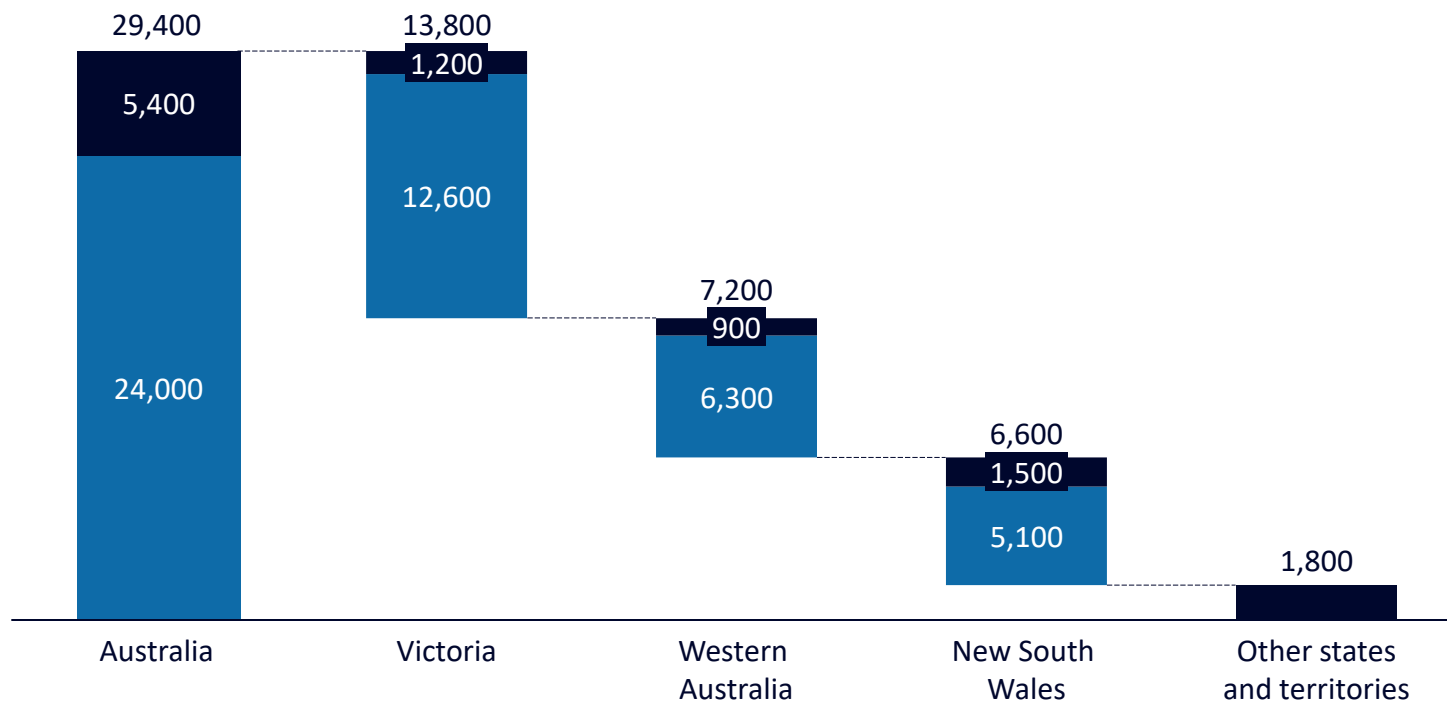
Crown employees enjoy diverse, long-term roles and opportunities. Crown offers careers in hospitality (37%), gaming (26%), accommodation (14%), and corporate functions, and an average tenure of seven years.

Crown's job contribution across Australia

Number of jobs¹; FY23

■ Offsite jobs² ■ Onsite jobs³

Crown offers **diverse roles with long tenure**. Crown has **over 1,000 different job titles**, and around **1,500 Crown employees** celebrated a tenure milestone of **20+ years** in 2023.



Notes: 1 – The term 'jobs' refers to the headcount of individuals employed by Crown Resorts, with one job representing one individual employed, regardless of whether the position is full-time, part-time, temporary, or contractual. 2 – 'Offsite' encompasses the employment positions that are supported by Crown or Betfair's operations but are not located within their physical properties. 3 – 'Onsite' refers to the total number of positions located within the physical premises of Crown's venues, including Betfair.
Sources: Crown; Mandala analysis.

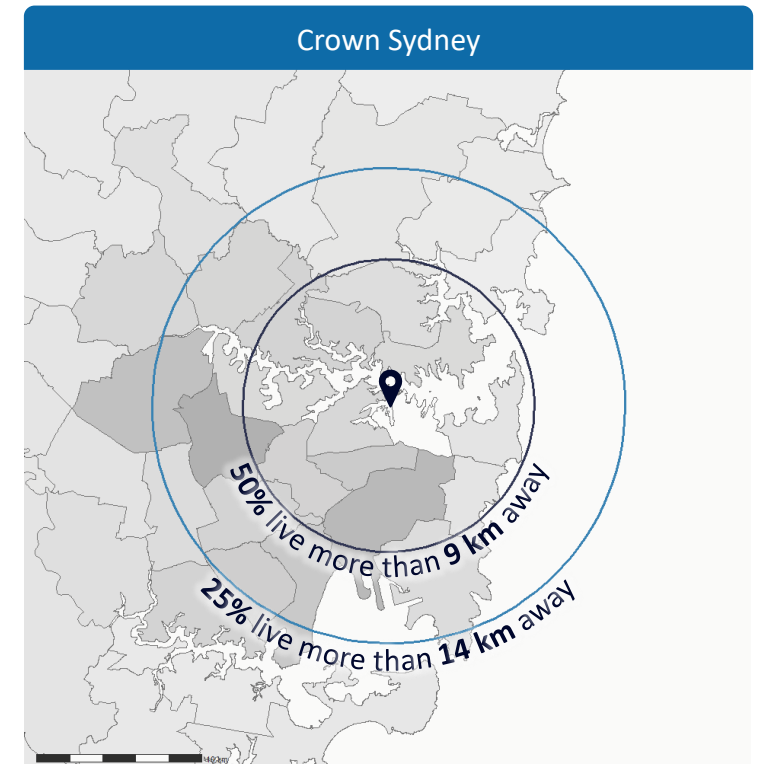
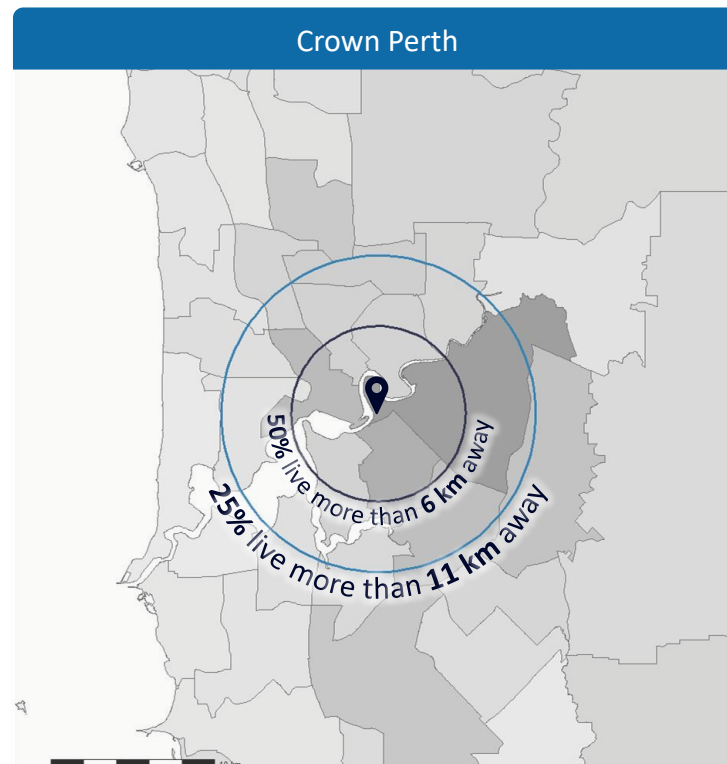
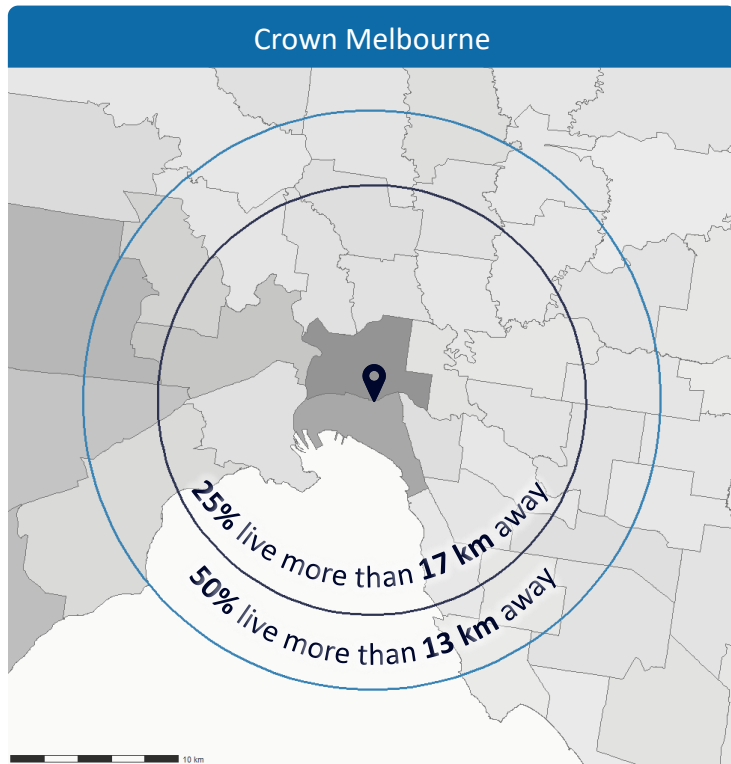
Crown's employees are more likely to be under 30 and live in the suburbs and regions

Geographic distribution of Crown's employees by venue

% of employees by electorate and geographic distribution; FY23



Crown employees are **geographically dispersed**, and **many are under age 30**. Employees are spread across suburbs and regions in each state, and Crown is **30% more likely to hire people under 30** than other employers.¹



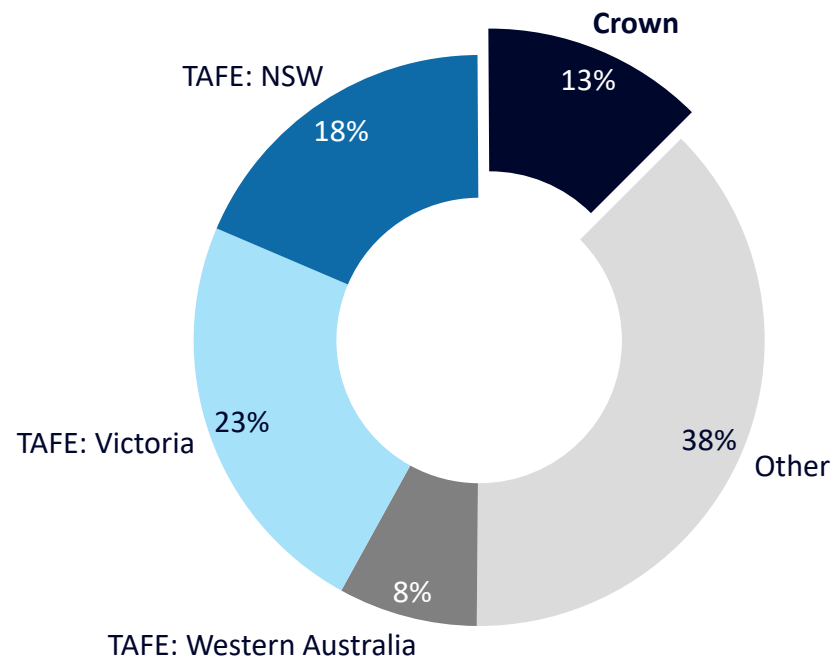
Notes: 1 – Compared to other employers in Australia.
Sources: Crown; ABS Labour Force Table 1 (December, 2023); Mandala analysis.

Crown trains 1 in 10 Certificate III hospitality graduates each year...

Annual Certificate III hospitality qualifications provided by Crown

% , Certificate III Food and Hospitality graduates in Victoria, NSW, and WA,¹ 2022

Crown produces **1 in 10** of the **Certificate III graduates for food and hospitality** in Crown's home states annually.



Notes: 1 – Proportion of completions for Certificate III food and hospitality courses (ASCED 1101) in 2022 within Victoria, NSW, and Western Australia.

Sources: Crown; Crown (n.d.), NCVET TVET program completions 2015-2022; Mandala analysis.

... and offers a range of formal qualifications across hospitality, security, and business

Qualifications provided by Crown

Crown College has supported 10,700 employees to further their qualifications since the training program began in 1999.

-  Certificate III in Hospitality  Hospitality
-  Certificate III in Tourism  Security Operations
-  Certificate III-IV in Commercial Cookery  Business Services
-  Certificate III-IV in Patisserie
-  Diploma and Advanced Diploma of Hospitality Management
-  Certificate II-III in Security Operations
-  Certificate IV in Frontline Management
-  Certificate IV and Diploma of Leadership and Management

Sources: Crown; Mandala analysis.

Crown provides a crucial contribution to the hospitality industry through ongoing training and employment

Crown’s contribution to the hospitality industry through training employees and students is particularly important given the significant hospitality workforce shortage.

In 2023, Australia had a shortage of hospitality workers, with on average around 45,000 job vacancies – or 4.9% of all accommodation and food services jobs – throughout 2023. As a result, hospitality has the second highest vacancy rate of any industry. Due to the shortage of workers, more hospitality employers are finding it difficult to recruit people given the lack of applicants.

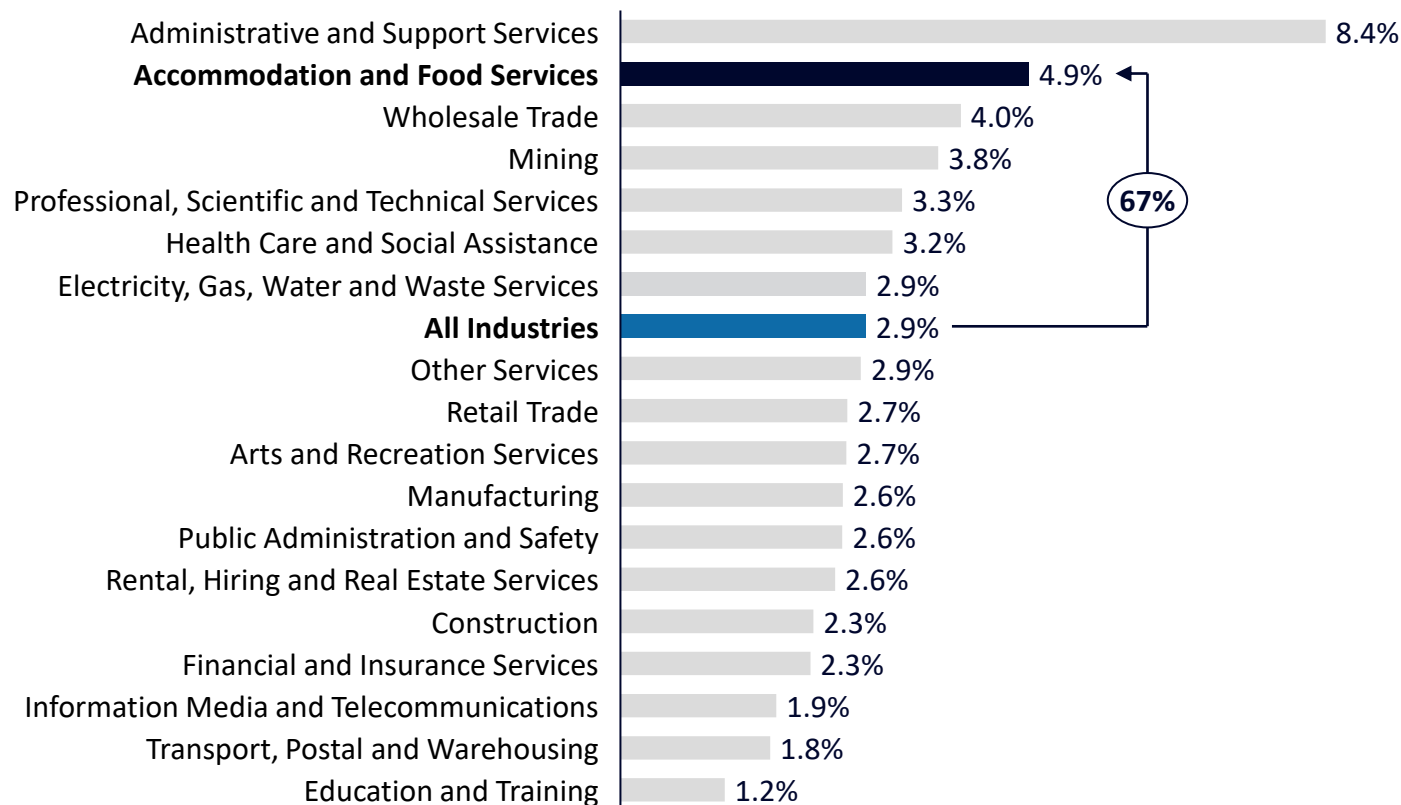
Formal hospitality qualifications are one key element of addressing the hospitality workforce shortage. Crown’s training of hospitality graduates means more people will have the necessary skills to work in the hospitality industry.

Another key element of supporting the hospitality workforce is through employee training. Crown provides significant development opportunities for employees to upskill, expand their areas of expertise, and deepen their knowledge relevant to the hospitality industry.

Job vacancies by industry

Job vacancies as a % of total workforce by industry, Australia, average across 2023 quarterly values

Hospitality has the **second highest vacancy rate** of any industry and a 67% higher vacancy rate than the total Australian workforce.



Crown provides opportunities for team members to explore new roles and further their careers, enabling many staff to enjoy decades-long careers with Crown

“When people ask me why I have stayed at Crown all these years, I tell them it’s because **it’s my home away from home.**”

“Crown gave me the opportunity to earn formal qualifications whilst balancing being a mum, **I now work in roles I never thought would be possible.**”

— Lana Jovic, Loyalty Operations Manager

Lana joined Crown over 29 years ago, beginning as a customer service attendant in 1995.

Lana was supported to develop her career at Crown, working in multiple roles across customer experience, administration and marketing. Through Crown College, Lana was able to complete her Diploma of Management and a variety of leadership training courses. Crown also supported Lana to complete off-site training in finance, something she never thought would be possible as she didn’t finish high school.

Lana believes that without the amazing managers and support network at Crown, she would not have got to where she is today. She has had the opportunity to travel to New Zealand, Sydney and Perth for multiple projects.

Lana was promoted to Loyalty Operations Manager in 2015, where she has seen her role continue to grow, now managing nearly 30 staff.



Lana Jovic

Loyalty Operations Manager

📍 Melbourne, Australia



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Crown attracts around 36 million visits annually to its award-winning resorts, more than all visits to the Sydney Opera House, Melbourne Cricket Ground and Optus Stadium in Perth combined

Crown's offering and awards by establishment

Crown is Australia's leading operator and developer of integrated resorts, featuring luxury accommodation and spas, award winning dining options, vibrant entertainment venues and shopping.

Crown Melbourne

- Crown Melbourne and Crown Perth are the only two Australian hotels to be awarded the Forbes 5 Star Rating
- 25 world-class restaurants, spas and luxury shopping
- Multiple awards for excellence in hospitality services
- Featuring iconic venues for Melbourne events

Crown Perth

- Crown Perth and Crown Melbourne are the only two Australian hotels to be awarded the Forbes 5 Star Rating
- Three hotels, along with 33 restaurants and bars
- 2,300 seat theatre, convention centre and meeting rooms
- WA's only fully integrated entertainment resort and home to Perth's largest hotel

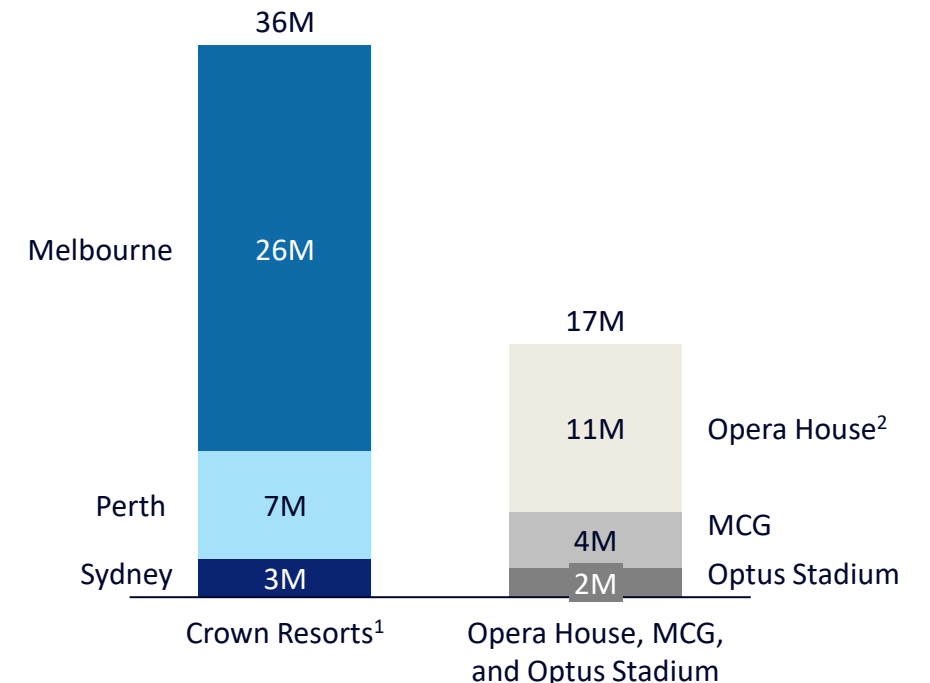
Crown Sydney

- Metropolitan Deluxe Hotel of the Year
- Only 6-star Green Star Hotel in operation in Australia
- Nine signature restaurants and bars
- Iconic and award winning building with 360-degree views

Crown's visits compared to other tourism venues¹

Millions of visits per attraction; FY23

Around 36m visits were recorded at Crown during FY23, more than the combined total of the **Sydney Opera House, Melbourne Cricket Ground and Optus Stadium**.



Notes: 1 – Reported visit numbers for Crown may be inflated due to the data collection approach. A conservative estimate for visitation is 24 million across the venues, as detailed in the Appendix. 2 – Pre-Covid visitation.
Sources: TripAdvisor (2023); Crown Perth (2023); We Digital Magazine (2023); Crown, Ticketmaster; Sydney Opera House (n.d., 2023); MCG (2019, 2023); Western Australian Government (n.d.); Mandala analysis.

Crown boosts Australian tourism through the sponsoring of major events

Crown is a key sponsor and host of Australian events, attracting visitors and supporting entertainment and hospitality offerings in Sydney, Melbourne, and Perth.

Crown supports major events, including as Australian Presenting Partner of the Taylor Swift Eras Tour, Major Partner of the 2023 Australian Open Golf, Hotel Supplier of the 2022 Australian Open for Tennis, Supporting Partner of VIVID in 2022 and 2023, Hospitality Services Partner of the 2023 Spring Racing Carnival, and host of a Mardi Gras installation on Wulugul Walk at Barangaroo. Between them, these flagship events have had millions of visitors, driving tourism within Australia.

Crown also hosts events within Crown Melbourne and Crown Perth. The theatre at Crown Perth saw millions of visitors during FY23 and is a key part of Perth's entertainment offering. In addition, the Palladium at Crown Melbourne is the venue of choice for many of Australia's most prestigious events, including the AFL Brownlow Medal.

Crown event partners and hosted events in 2022-2023

	Event	City	Attendees	Crown's support
External events	 Eras Tour	Sydney and Melbourne	620,000	Australian Presenting Partner
	 Australian Open Golf	Sydney	60,000	Major Partner
	 Australian Open Tennis	Melbourne	350,000	Hotel Supplier
	 VIVID	Sydney	3.3 million	Supporting Partner
	 Spring Racing Carnival	Melbourne	570,000	Hospitality Services Partner
On Crown premises	 Crown Palladium	Melbourne	178,000	Host
	 Moulin Rouge	Perth	140,000	Host
	 Come From Away	Perth	20,000	Host
	 Chicago	Perth	48,000	Host
	 Rocky	Perth	29,000	Host
	 Mary Poppins	Perth	92,000	Host

Notes: FY23 attendees at Crown premises. Sources: Crown Resorts; ABC (2024); Grand Prix (2023); Australian Open (2022); Australian Open (2024); Golf Australia (2023); NSW Government (2023); Racing Victoria (2023); Mandala analysis.

Crown was the Presenting Partner of the Taylor Swift Eras Tour, one of the largest events in Australia's history

"Crown Sydney went over and above to share the magic with the people of Sydney of Taylor Swift's arrival. Crown Sydney created excitement and happiness, supporting Sydney's reputation as a global city with a community feel."

— Paul Nicolaou, Business Sydney

"Melbourne's hotel rooms had **occupancies of 74-88 per cent on the nights of The Eras Tours, significantly boosted by room demand from 'Swifties' attending the concerts.** All three nights of The Eras Tour now hold the title for the highest ADR (Average Daily Rate) and RevPAR (Revenue Per Available Room) on record for Melbourne."

— Dougal Hollis, Accommodation Australia

Crown Resorts was the Australian Presenting Partner of the Taylor Swift | The Eras Tour, playing a key role in bringing one of the most globally significant entertainment events to the country with almost **500,000 people** attending concerts in Melbourne and Sydney.

\$170 million was spent by domestic and international tourists attending the Eras Tour across attractions in Sydney and Melbourne. Airlines, public transport, retail and hospitality venues across the cities also saw significantly increased business – thanks to "Swifties" in each city.



TAYLOR SWIFT THE ERAS TOUR

Presented by



with special guest
Sabrina Carpenter

Crown operates the safest gaming venues in Australia, with world-leading responsible gaming practices

Crown is leading a global and national shift in gaming practices.

Crown's approach includes initiatives such as:

World-leading carded play: Carded play for EGMs, supporting safer gaming and reducing the risk of financial crime.

Since its introduction at Crown Melbourne, Crown has had over 240,000 sign-ups. Over 4 million gaming sessions have ended within their set limits and nearly 99% of total sessions, with Crown providing the guardrails for guests to better manage their gaming behaviour and spending.

Advanced transaction monitoring: Using automated transaction monitoring systems, Crown proactively identifies and investigates suspicious activity, preventing illicit transactions and protecting the integrity of its operations.

Responsible Gaming practices: Crown prioritises responsible gaming, implementing a range of measures to educate and support patrons. These include the world-leading PlaySafe program, an online self-exclusion portal which is world-first for land-based casinos, and staff intervention training.

Continuous improvement and collaboration: Crown evaluates and enhances its Responsible Gaming and Anti-Money Laundering programs, actively engaging with governments and regulators to align with industry standards and best practices and all our team members receive continuous training both in responsible gaming and Anti-Money Laundering.

Crown's leading RG and AML/CTF practices



Responsible Gaming (RG)

- World-leading carded play for gaming machines to enhance RG services
- \$23 million invested in RG transformation
- Crown PlaySafe program designed and introduced for player safety
- 24/7 purpose-built quiet space for conversations between highly trained staff and vulnerable players
- Online portal allows guests to self-exclude without the need to visit



Anti Money Laundering (AML) and Counter-Terrorism Financing (CTF)

- \$71 million invested in transforming AML/CTF measures since FY21, including an additional 117 FTE (increase of 390%)
- Moving to cashless gaming, with technology upgrades complete and the implementation of carded play Electronic Table Games
- Customer screening measures implemented to reduce the risk of financial crime
- Automated systems implemented to monitor transactions for unusual and potentially suspicious activity, as well as to conduct ongoing customer due diligence
- Group-wide MOUs with the Australian Federal Police and Australian Criminal Intelligence Commission

"With the introduction of carded play at Crown Melbourne we are able to track the time and money our guests spend in real time. Carded play not only creates guardrails to support our guests, but the information collected allows us to analyse trends in spending and predict ahead of time if someone could be about to experience gambling harm.

This is world-leading and something I am proud to share with my colleagues in the research community."

Dr Jamie Wiebe, Group EGM Crown PlaySafe Strategy & Policy, Crown Resorts



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Crown is one of the highest tax payers in the hospitality industry, with over \$500 million in taxes paid in FY23

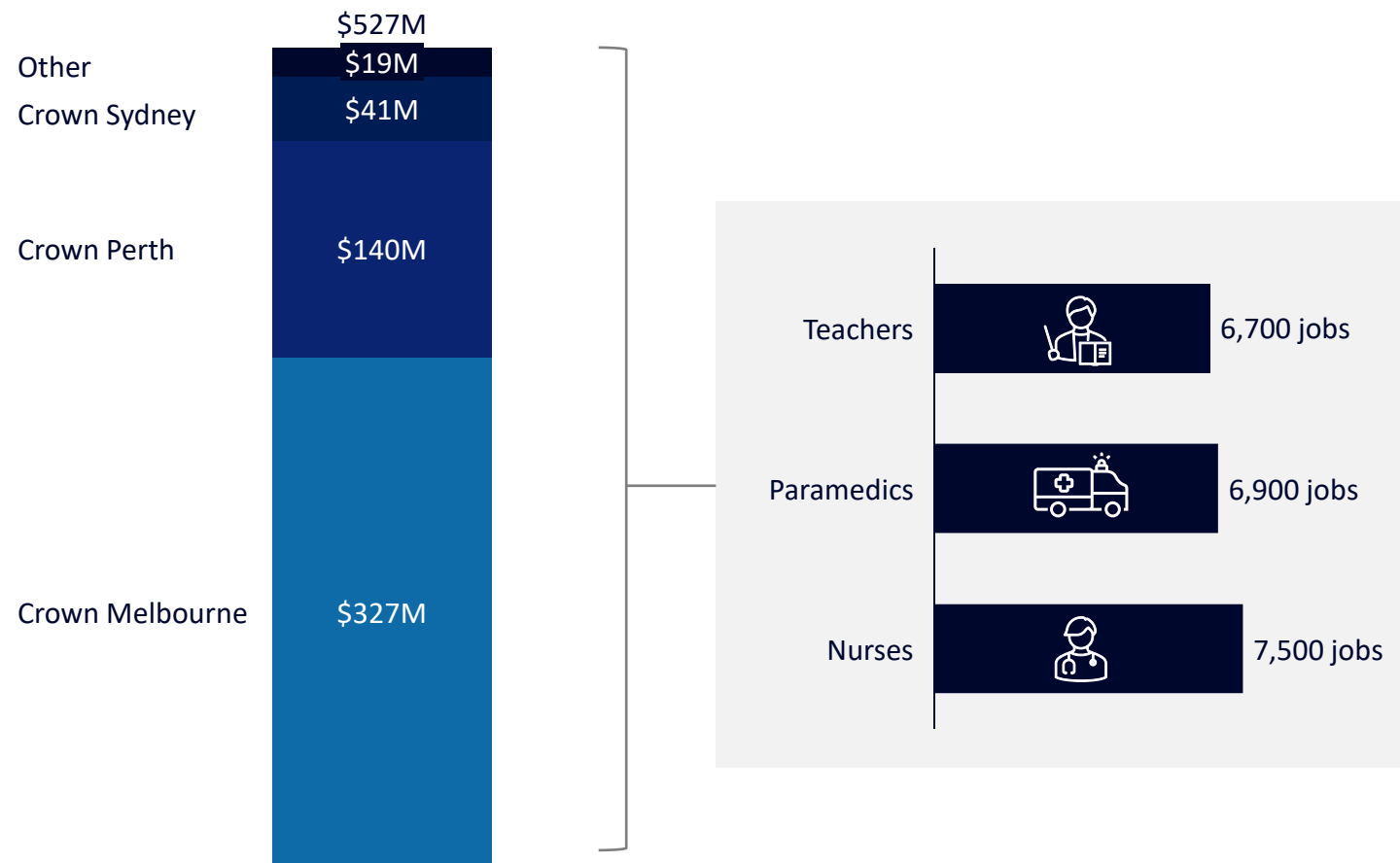
Crown pays both State and Federal taxes, including gaming taxes, payroll, property taxes, GST, as well as community levies.

Crown makes significant contributions to State budgets, which can be used to fund critical essential services. Crown's FY23 tax contributions alone represents the value of salaries of 6,700 teachers, 6,900 paramedics, or 7,500 nurses.

Crown paid \$19 million in community benefit levies as part of its tax contributions in FY23, which help to support local and regional communities.

Crown's tax contributions¹

\$AU; Crown resorts' FY23 taxes, and comparable full-time equivalent positions of key essential workers







Notes: 1 – Other includes Betfair subsidiary and other group corporate taxes. The number of jobs supported was calculated using the annual salaries of first-year paramedics, registered nurses, and teachers, based on the 2023 rates in Victoria, Western Australia and New South Wales. Sources: Crown; Australian Nursing and Midwifery Federation – Vic Branch (2023); Victoria Department of Education and Training (2023); Ambulance Employees Australia – Victoria (2023); WA Department of Health (2023); WA Department of Education (2023); St John Ambulance WA (2023); NSW Department of Education (2023); NSW Health (2023); NSW Health (2023); NSW Premier, Treasurer (2023); Victorian Government (2023); Mandala analysis.

Crown gives back to the community through enduring partnerships, donations and in-kind support

Crown's community support

Key focus areas of community support include **homelessness, family and domestic violence, substance abuse, health and medical research, disaster relief, and first responders.**

Employment opportunities 	Financial support 	Team member giving 	Non-monetary giving 
<p>Crown supports equal opportunities for all employees, including through key programs of CROWNability and the Indigenous Employment Program.</p> <hr/> <p>The CROWNability program aids Crown's goal of being a disability confident organisation, with 900 employees having participated in the program.</p> <p>Crown's Indigenous Employment Program provides opportunities for First Nations people, with 1000 employees having been part of the program.</p>	<p>Crown financially supports a wide range of community causes through the Crown Resorts Foundation.</p> <hr/> <p>Over the past 10 years Crown Resorts Foundation has supported over 88 charities through \$83 million¹ in donations.</p> <p>Crown partners with community organisations to help give back to communities, such as the \$25 million partnership with WA Telethon and with organisations such as The Salvation Army, Police Veterans Victoria and support to community relief organisations .</p> <p>Crown also provides financial relief in times of emergency including \$1.5m for bushfire relief.</p>	<p>Crown also supports team members to contribute to their communities.</p> <hr/> <p>Crown's Community Champions program has provided \$600,000 in grants for team member fundraising initiatives since inception, with support for causes such as children's medical care, disability, and mental health.</p> <p>Team members also donate to a range of community partners, which in 2023 included part of \$305,000 for The Salvation Army Christmas Campaign, and Christmas presents valued at \$25,000.</p>	<p>Crown provides vital assistance in times of need through volunteers, food, hotel rooms, and in-kind giving.</p> <hr/> <p>Crown donates venues, food, beverages, and accommodation, such as the 16,000 items donated after disasters in the last two years,² and over 1,200 room nights for people on a journey from family violence.</p> <p>Crown supports fundraising events held at our resorts, including The Million Dollar Lunch for the Children's Cancer Foundation, the Street Side Medics Gala, and the WA Telethon Gala.</p>

Notes: 1 – By the end of FY24. 2 – Donations after the 2022 Victoria Floods, 2023 WA Floods, and 2024 Western Victoria Fires.
Source: Mandala analysis.

Crown proudly supports community organisations that provide essential services and aid to Australians in need

“Project 614 is more than a partnership with Crown, it is a **true relationship with mutual respect and an understanding** that together we can be flexible and address emerging issues in the community.”

“Last Christmas, **Crown’s 72 volunteers and next-level food supported a special lunch for 520 people.** Crown’s values, care, and hospitality excellence meant people – who otherwise might have been having a tough time - were treated incredibly well and felt cared for, it was really quite profound.”

— Major Brendan Nottle, The Salvation Army

The partnership between Crown and The Salvation Army’s Project 614 has spanned almost 20 years, supporting homeless and vulnerable community members in Melbourne. Project 614’s café serves free meals to hundreds of people every week, providing a safe, supportive, inclusive and welcoming community.

Crown provides financial support, skilled volunteers, food and supplies for Project 614. Along with its other support, Crown has provided critical ongoing funding of \$150,000 per annum which has enabled Project 614 to employ an outreach worker for services throughout Melbourne.



Major Brendan Nottle

Commanding Officer at The Salvation Army

📍 Melbourne, Australia



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Crown contributes \$2B to the Victorian economy annually and is the state's largest single site employer

Crown Melbourne is Australia's leading integrated resort and is a major gaming, hospitality, and entertainment complex in the heart of Melbourne, featuring luxury accommodation, numerous fine dining establishments, casino, alongside a wide array of retail and leisure facilities.

Drives economic growth



Crown Melbourne is the largest single site employer in Victoria

Provides jobs and training



Certificate III Hospitality graduates in Victoria are trained by Crown

Leading tourism provider



visits to Crown Melbourne in FY23, equivalent to around 3 in 10 of the total annual visits to Victoria¹

Supports communities



in FY23 taxes for Victoria,² more than the Victorian Government's total Hospital Infrastructure Delivery Fund



Total contribution²

13,800 jobs
 \$2B GVA

12,600 jobs onsite
 \$1.2B direct GVA

1,200 jobs offsite
 \$0.5B indirect GVA

Guest spending
 \$0.3B GVA

Victoria
Crown Melbourne

Notes: 1 – Visits to or within Victoria, including international trips, domestic overnight trips to or within Victoria, and day trips, as defined and compiled by Tourism Research Australia and the Victorian Department of Jobs, Skills, Industry and Regions. 2 – Includes Betfair
Sources: Crown; Victorian Government (2023a, 2023b, 2024c); VECCI; Tourism Research Australia (2023a, 2023b); Mandala analysis.

Crown Perth is one of Western Australia's largest tourism destinations and employs 8% of the hospitality workforce in the state

Crown Perth is a renowned entertainment complex in Western Australia, offering a diverse mix of hotel accommodation, dining options, casino gaming, and conference facilities, situated on the eastern banks of the Swan River.

Drives economic growth



Crown Perth is the largest single site employer in Perth

Leading tourism provider



Visits to Crown Perth's in FY23, equivalent to 1 in 5 of the total annual visits to WA¹

Provides jobs and training

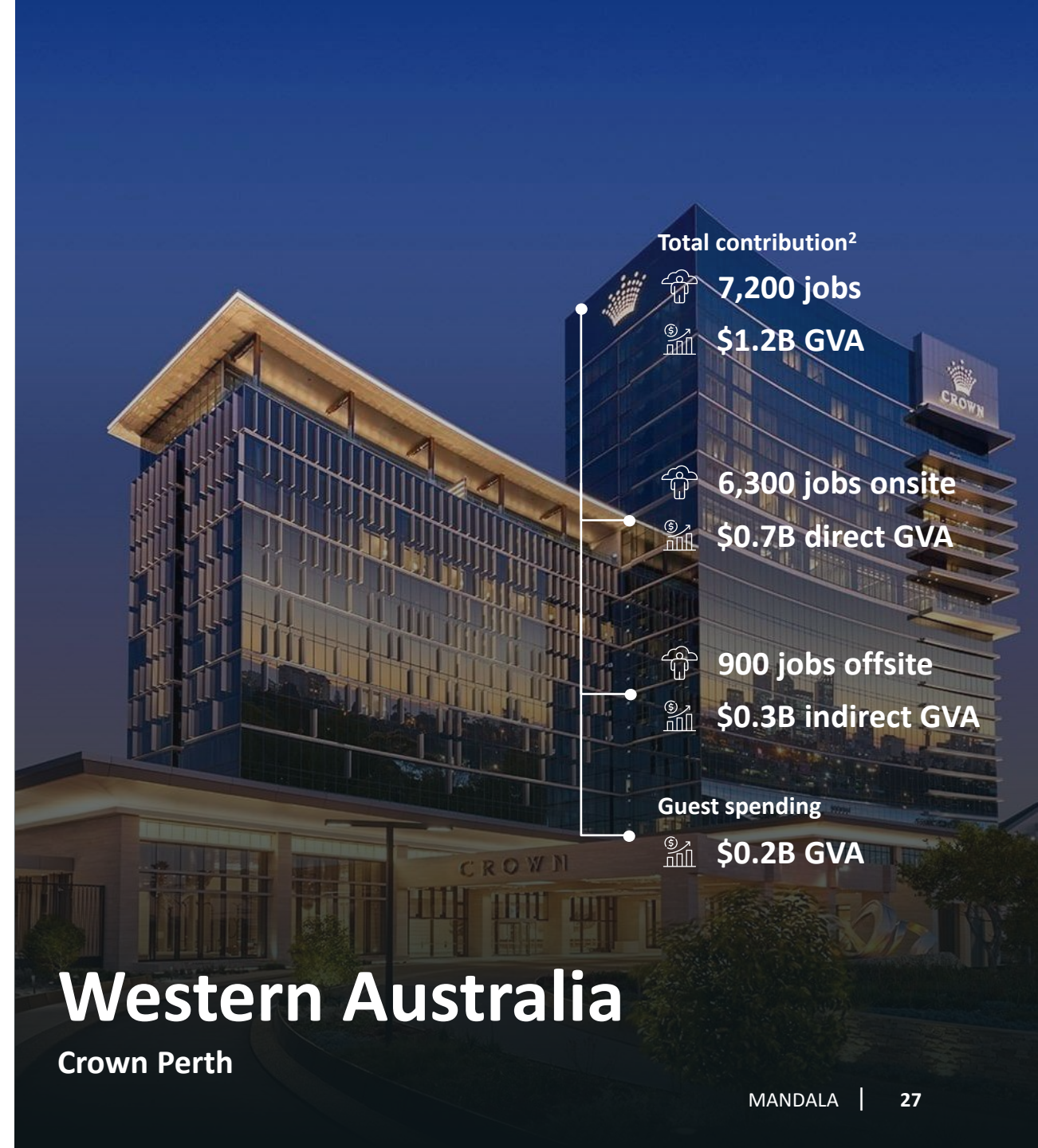


of the hospitality workforce in WA is employed by Crown

Supports communities



in FY23 taxes for WA



Total contribution²

7,200 jobs
\$1.2B GVA

6,300 jobs onsite
\$0.7B direct GVA

900 jobs offsite
\$0.3B indirect GVA

Guest spending
\$0.2B GVA

Western Australia

Crown Perth

Notes: 1 – Visits to or within WA, including international trips, domestic overnight trips to or within Western Australia, and day trips, as defined and compiled by Tourism Research Australia and Tourism Western Australia. 2 – Contribution analysis includes Crown Resorts and Betfair.
Sources: Crown; ABS 2021 Census; Western Australian Government (2023, n.d.); Tourism Research Australia (2023a, 2023b); Mandala analysis.

Crown supports the NSW economy, spending almost half a billion dollars annually at NSW businesses

Crown Sydney, situated in Barangaroo, is a premier integrated resort that features a luxury hotel, a range of premium dining outlets, and gaming facilities, serving as a significant landmark in Sydney's skyline.

Drives economic growth

\$450m

spent at NSW businesses annually

Leading tourism provider

#1

Australian presenting partner for Taylor Swift Eras Tour, the biggest event in Sydney since 2000 Olympics

Provides jobs and training

1 in 10

Certificate III Hospitality graduates in NSW are trained by Crown

Supports communities

\$46m

in FY23 taxes for NSW, sufficient to fund the Government's four-year regional growth election commitment¹

Notes: 1 – \$44 million in funding for regional growth initiatives. 2 – Contribution analysis includes Crown Resorts and Betfair.
Sources: Crown; Destination NSW (2024); NSW Government (2023); Mandala analysis.

Total contribution²

6,600 jobs 

\$900M GVA 

5,100 jobs onsite 

\$100M direct GVA 

1,500 jobs offsite 

\$700M indirect GVA 

Guest spending

\$100M GVA 

New South Wales

Crown Sydney



01	Crown contributes \$4.8b to Australia's local, state and national economies and communities	
02	Crown is the largest hospitality employer in Australia, and is one of the largest hospitality training providers in Australia	
03	Crown is Australia's leading tourism provider, attracting millions of visitors every year	
04	Crown supports the community through its significant tax contributions, and through its philanthropic activity	
05	State analyses	
A	Appendix	



A

Appendix



A.1

Methodology



A.2

References



A three-step approach was used to measure Crown’s economic benefits to Australia: direct, indirect, and guest spending

Crown economic impact – Gross Added Value		
Direct impact	Indirect ‘supply chain’ impact	Guest spending impact
<ul style="list-style-type: none"> ▪ Crown’s direct injection into the Australian economy stems from its core business operations; hotels, restaurants, bars, entertainment facilities, casinos including Betfair. ▪ We calculate the direct impact as the sum of Crown’s gross operating surplus, through Earnings Before Interest, Tax, Depreciation, and Amortisation (EBITDA) and employee wages.¹ ▪ We add back gaming taxes to show the full extent of money injected into the economy before those funds are paid out in gaming licences.² 	<ul style="list-style-type: none"> ▪ Crown’s (including Betfair) expenditure on domestic suppliers generates an indirect economic impact. These suppliers purchase inputs from other industries, leading to further indirect economic impacts. ▪ Using input-output tables, we determine the indirect impact through output multipliers. These represent the total value of production by all industries needed to satisfy an extra dollar's worth of final demand for that industry's output.³ ▪ We create an output multiplier for our indirect economic impact by taking a weighted average of the output multipliers across relevant industries: accommodation, food and beverage services, cultural and creative activities, and gambling. Finally, we multiply our direct economic impact by our multiplier, and subtract the direct economic impact to estimate the indirect economic impact. 	<ul style="list-style-type: none"> ▪ Crown’s hotel guests' economic contributions capture the broader economic impact of the money spent by these guests in various sectors beyond their direct expenditure at Crown Resorts’ facilities. This includes spending on items including local transportation, meals, shopping, and entertainment. ▪ We take into account a predetermined spending pattern for tourists. This profile includes a wide range of expenditures such as transport, meals, and shopping. For domestic tourists, it reflects common spending areas in Australia, while for international tourists, it accounts for the money spent within the country. ▪ Specific benchmarks are set, such as assuming tourists spend a certain percentage of their budget on alcohol and dining within the resort. This helps to estimate indirect impacts. ▪ We then use the GVA turnover ratio to convert spending into GVA, reflecting the value that the spending adds to the economy.

Data
<ul style="list-style-type: none"> ▪ Crown and Betfair financial statements as of FY23 and list of domestic supplier with ABN and spending. ▪ ABS National Accounts including – Input and Output tables ▪ Expenditure data on money spent in Australia during overnight.⁴

Key assumptions
<ul style="list-style-type: none"> ▪ We assume a proportional relationship between Crown’s operations and economic impact. ▪ We established a predefined guest spending patterns at Crown venues, including specific allocations for accommodation, food, and beverage.

Notes: 1 – Australian System of National Accounts: Concepts, Sources and Methods (2024). 2 – While gaming taxes are paid by the casinos based on their operations, the ultimate economic burden of the tax can be shifted to consumers in the form of higher prices for gaming activities or can affect the casinos' profits. Since these taxes are tied to the production and provision of a service – in this case, gaming services – they are considered a part of the overall taxes on production. 3 – For more information on the theory underpinning this analysis, see source ABS (2024, p. 17); 4 – Tourism Research Australia provides information on travel activity and expenditure by international visitors. See Tourism Research Australia (2024).

Approach to other modelling and key assumptions

Estimates	Method summary	Key assumptions
<p>Number of onsite and offsite jobs</p>	<ul style="list-style-type: none"> For onsite job calculations, we use employment data provided by Crown and Betfair, which includes the headcount of directly employed staff, contractors, and personnel working at tenancies within Crown properties. For offsite jobs, we consider the jobs created through Crown and Betfair's spending on suppliers minus the onsite job figures. To do this: <ul style="list-style-type: none"> We use input-output multipliers to estimate the indirect full-time equivalent (FTE) employment effect of Crown's expenditure on its supply chain. We proportionally distribute the resulting indirect FTE job figures across states, guided by each state's Gross State Product (GSP) to capture the influence of Crown's spending extending beyond the immediate transactions with its suppliers. To translate indirect jobs from FTE to headcount, we apply the formula: Total Headcount = Full-Time (FT) + (Part-Time (PT) * FTE fraction). The PT reflects industry-specific employment patterns. The final number of offsite jobs is determined by subtracting the onsite employment figures from the total headcount. 	<ul style="list-style-type: none"> We assume that the input-output multipliers accurately reflect the indirect effects of Crown and Betfair's spending on its supply chain, capturing the ripple effects across the economy. More details on are provided below. The distribution of indirect FTE job figures across states is based on GSP. We assume that GSP is a reliable indicator of the economic distribution and reach of Crown and Betfair's spending, accurately reflecting how its impact spreads across different regions.¹ We use a 0.5 fraction to convert part-time employment into full-time equivalent (FTE) terms. In other words, we assume on average, part-time workers contribute half the hours of full-time workers across the industries.
<p>Crown visitation</p>	<ul style="list-style-type: none"> We present the footfall figures for the properties as provided by Crown. We have also estimated the visitation numbers using available data. For hotel guests, we use number of bookings and an average occupancy rate per room for FY23. For patron count for restaurants and bars, we count transactional data for FY23. These data points include the number of people per bill. For casino visits, we calculate carded play visits with a factor applied to estimate non-carded visits for the FY23 period. 	<ul style="list-style-type: none"> For hotel guests, we use multiplier of 1.5 individuals per room, as informed by Crown's subject matter experts. For casino visits, we apply an adjustment factor of 2. We derived this factor from the comparison of unrated versus rated gaming revenue from Crown Melbourne in FY19 and FY23, to ensure all gaming activity for the year is being considered. We do not include people visiting the tenancies due to data limitations.
<p>Location of Crown employees, suppliers, visitors, etc.</p>	<ul style="list-style-type: none"> For geospatial analysis, we use postcode-level data and map it to the corresponding ABS Mesh Blocks², allowing us to have a detailed and granular mapping of suppliers, suppliers spending, hotel bookings and casino visitors. This data is then aggregated to match the boundaries state electorates. 	<ul style="list-style-type: none"> We assume that each item, such as supplier data, employee locations, visitor origins, bookings, and transactions, is evenly distributed according to the spatial distribution of each Mesh Block within its post-code.

Notes: 1 – GSP from 2022-23 as per Australian National Accounts (2024). 2 – Allocation files for spatial representation are taken from the ABS Mesh Blocks 2021. State electorates are taken from the State Electoral Divisions for 2022. See ABS (2024).

We used input-output multipliers to reflect the indirect effects of Crown's spending on its supply chain

We use employment multipliers to reflect the wider impact of Crown's operations on employment across its supply chain.

Crown's direct employment in Australia stems from its core business operations: hotels, restaurants, bars, entertainment facilities, and casinos. Beyond providing direct jobs, Crown's expenditure on domestic suppliers triggers a cascade of economic activity. These suppliers source from other industries, which, in turn, generates additional employment – these are the indirect jobs created by the multiplier effect.

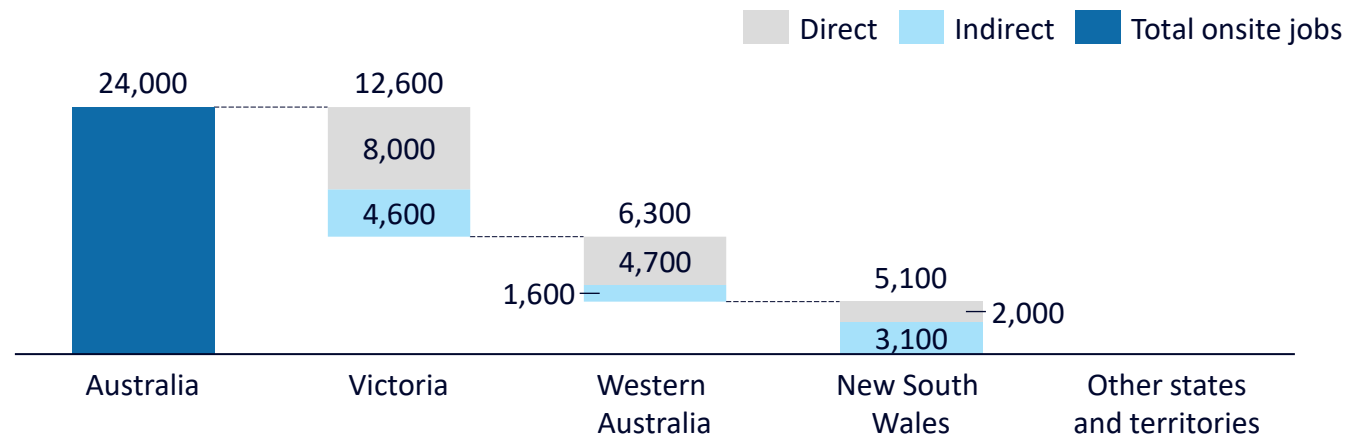
The direct employment figures represent the headcount of people in Crown payroll.

With employment multipliers, we determine the extended employment impact by estimating the number of additional jobs supported by every direct job at Crown. This takes into account the value chain across relevant industries such as accommodation, food and beverage services, and others. The employment multipliers are derived from input-output tables, reflecting the total employment output produced by all industries needed to satisfy Crown's operational demands.¹

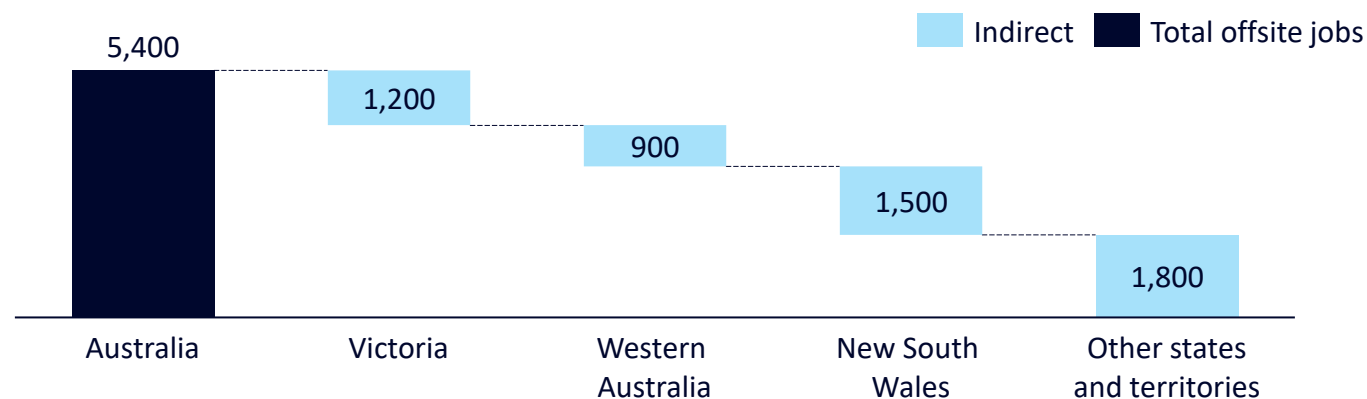
1 – For more information on the theory underpinning this analysis see ABS (2024, p. 17).

Crown's job contribution across Australia, direct and indirect

Number of onsite jobs^{1,2}; FY23



Number of offsite jobs^{1,3}; FY23



Notes: 1 – The term 'jobs' refers to the headcount of individuals employed, with one job representing one individual employed, regardless of whether the position is full-time, part-time, temporary, or contractual. 2 – 'Onsite' refers to the total number of positions located within the physical premises of Crown's venues. 3 – 'Offsite' encompasses the employment positions that are supported by Crown's operations but are not located within Crown's physical properties.

Sources: Crown; Mandala analysis.



A

Appendix



A.1

Methodology



A.2

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Note: All dollar figures are Australian dollars unless indicated otherwise.

