



HIA-Urban Money Industry Outlook Webinar

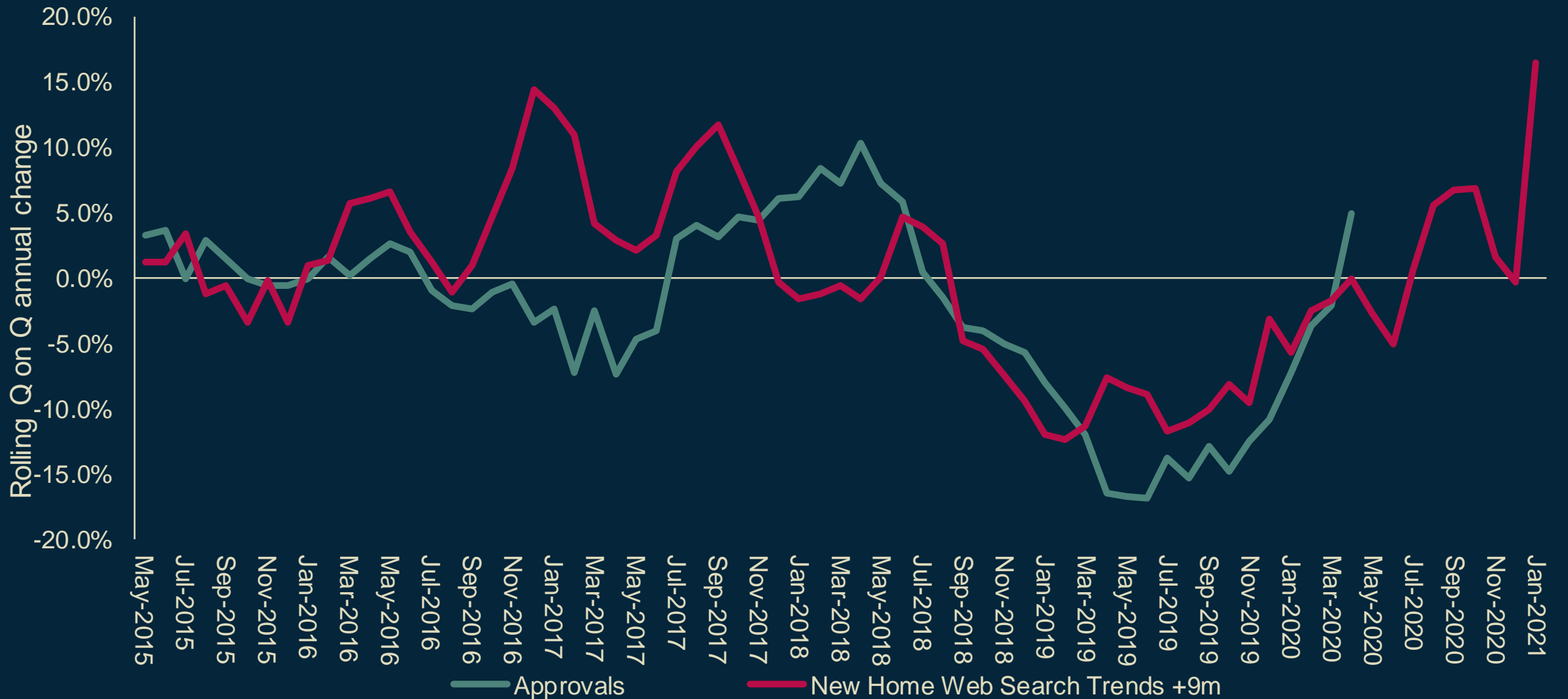
Tim Reardon, HIA Chief Economist

June 2020

Approvals and Google Trends June 2020

Approvals & New Home Web Search Trends - Australia

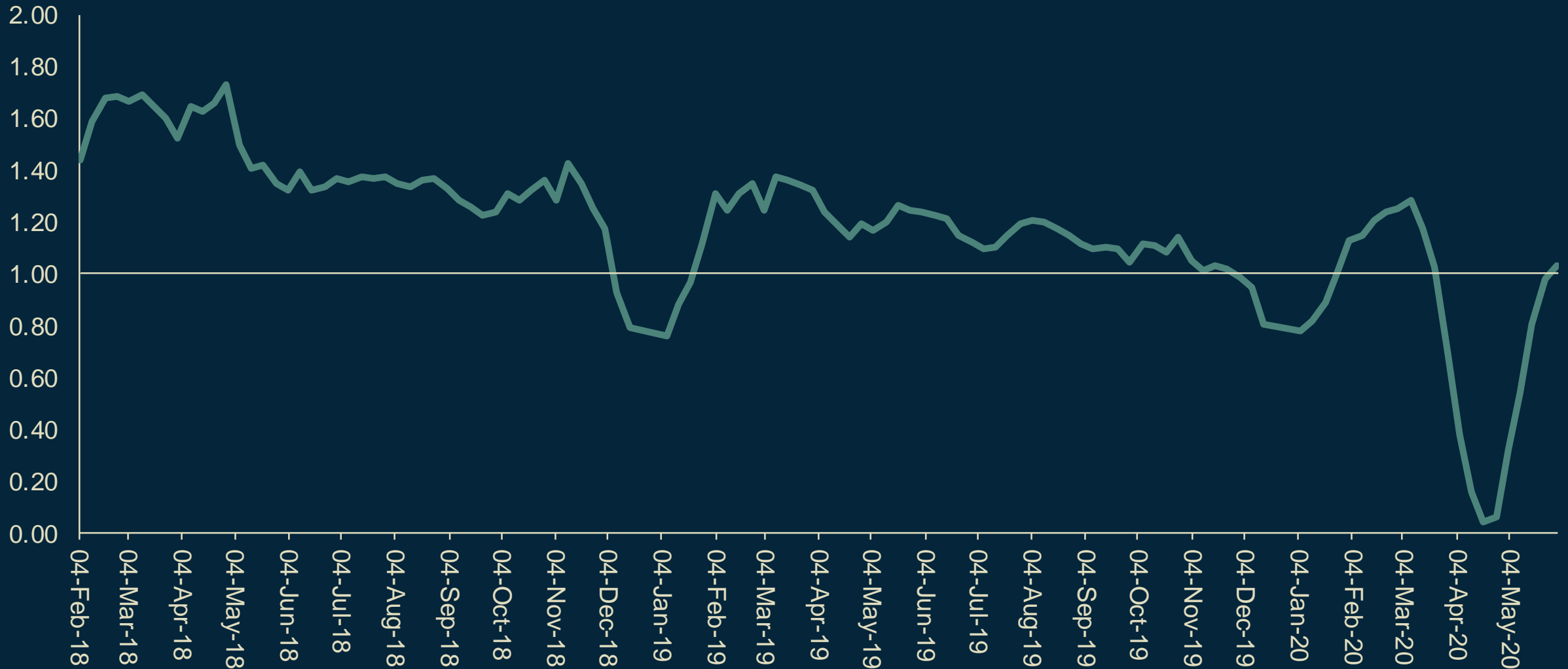
Source: ABS, HIA, Google



HIA Display Homes



Display Home Traffic Index - WA

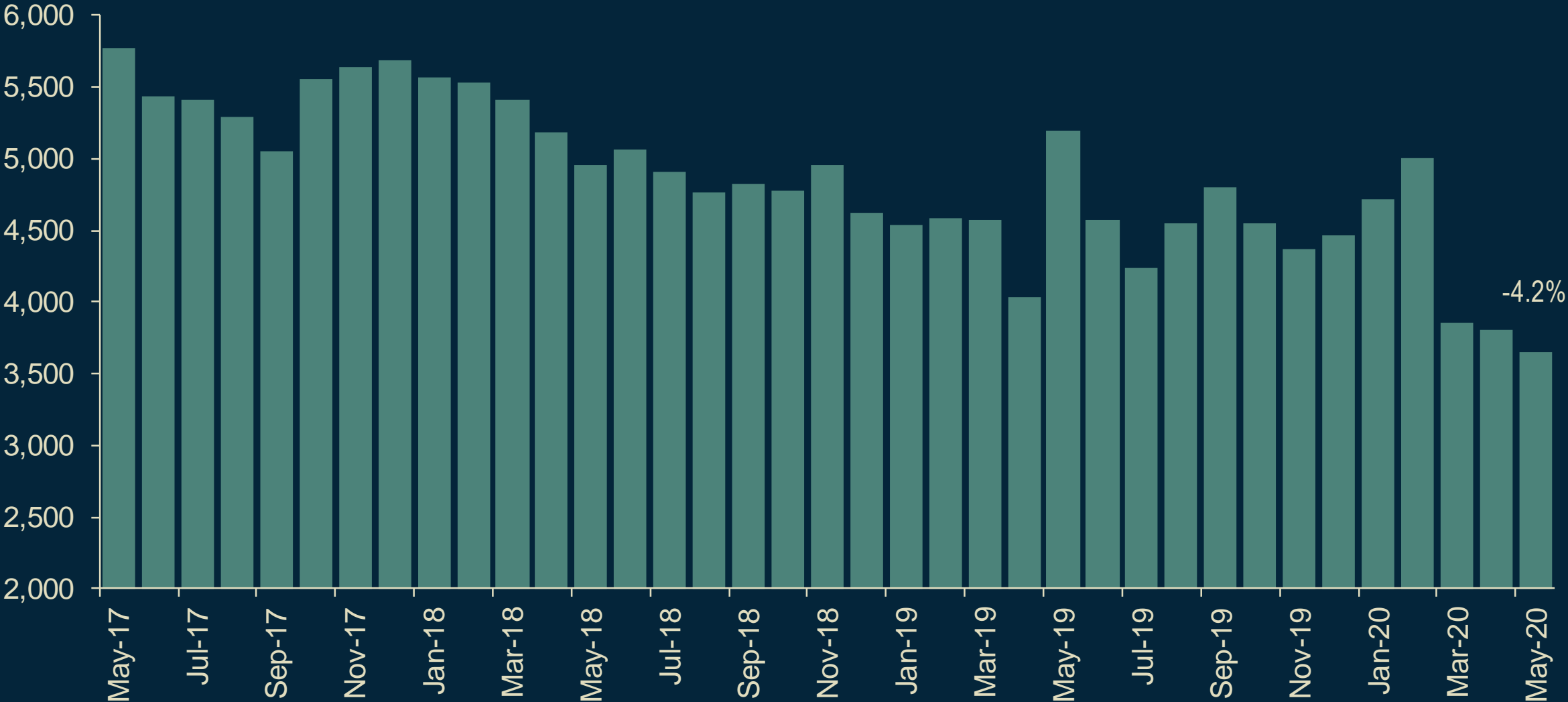


Source: HIA

HIA New Home Sales Report



Private New House Sales - Australia (SEASONALLY ADJUSTED)

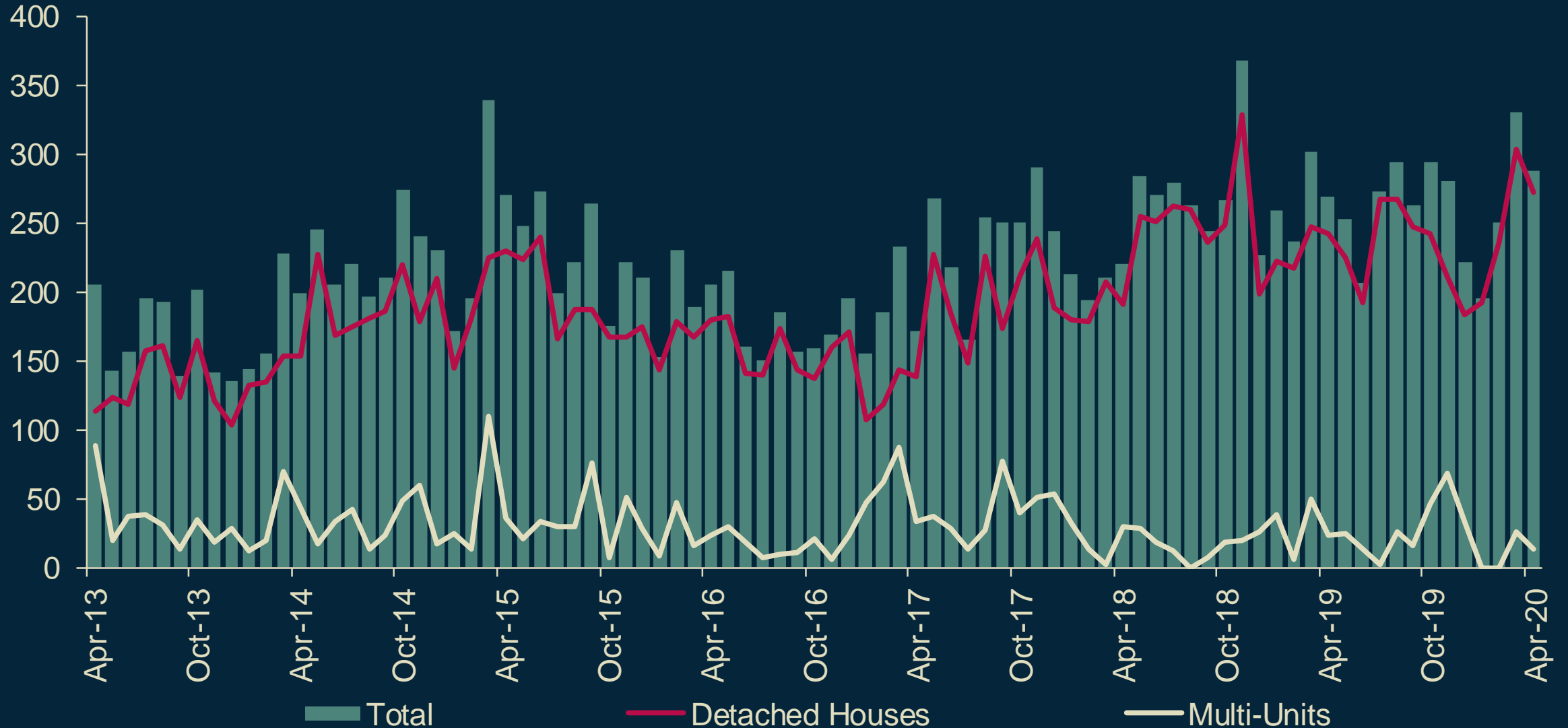


Source: HIA

ABS Building Approvals

TAS Monthly Dwelling Approvals

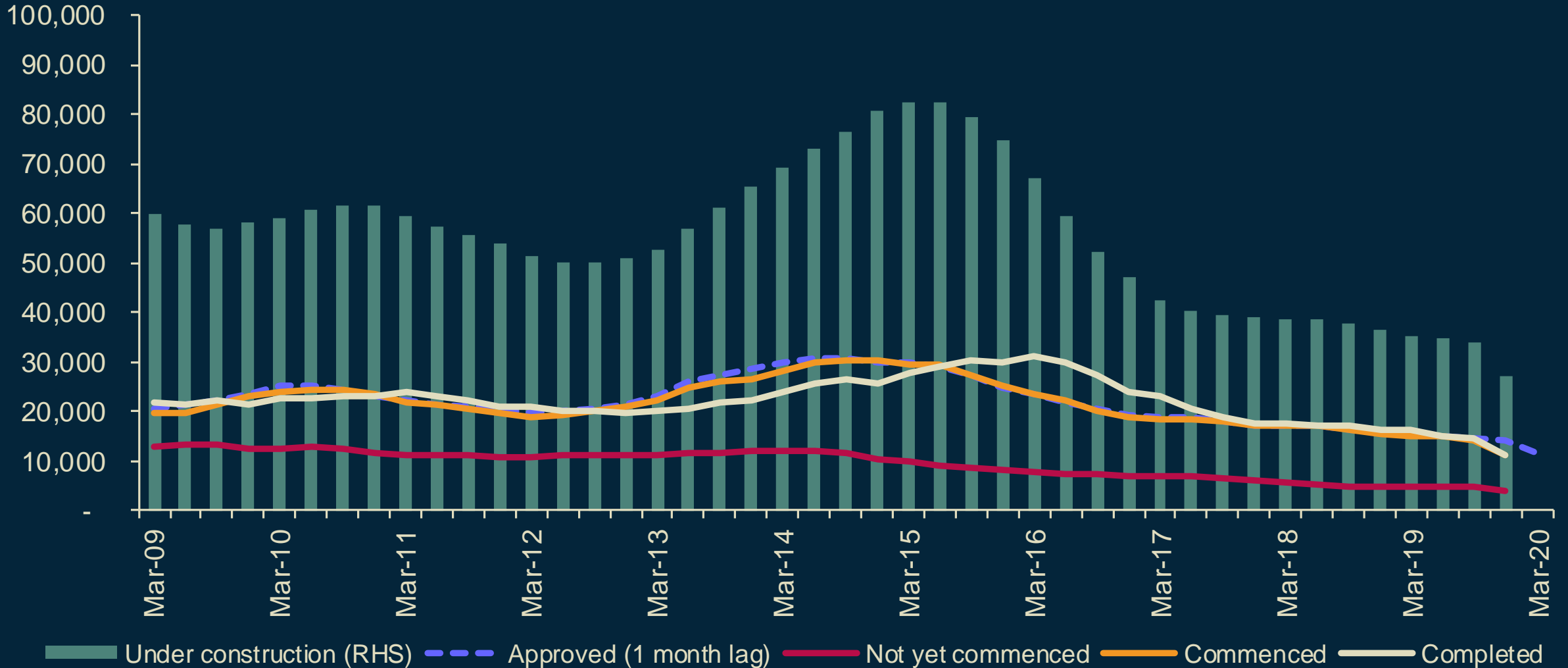
Source: ABS Building Approvals



Detached House Pipeline - WA

Snapshot of the Building Activity Pipeline - House

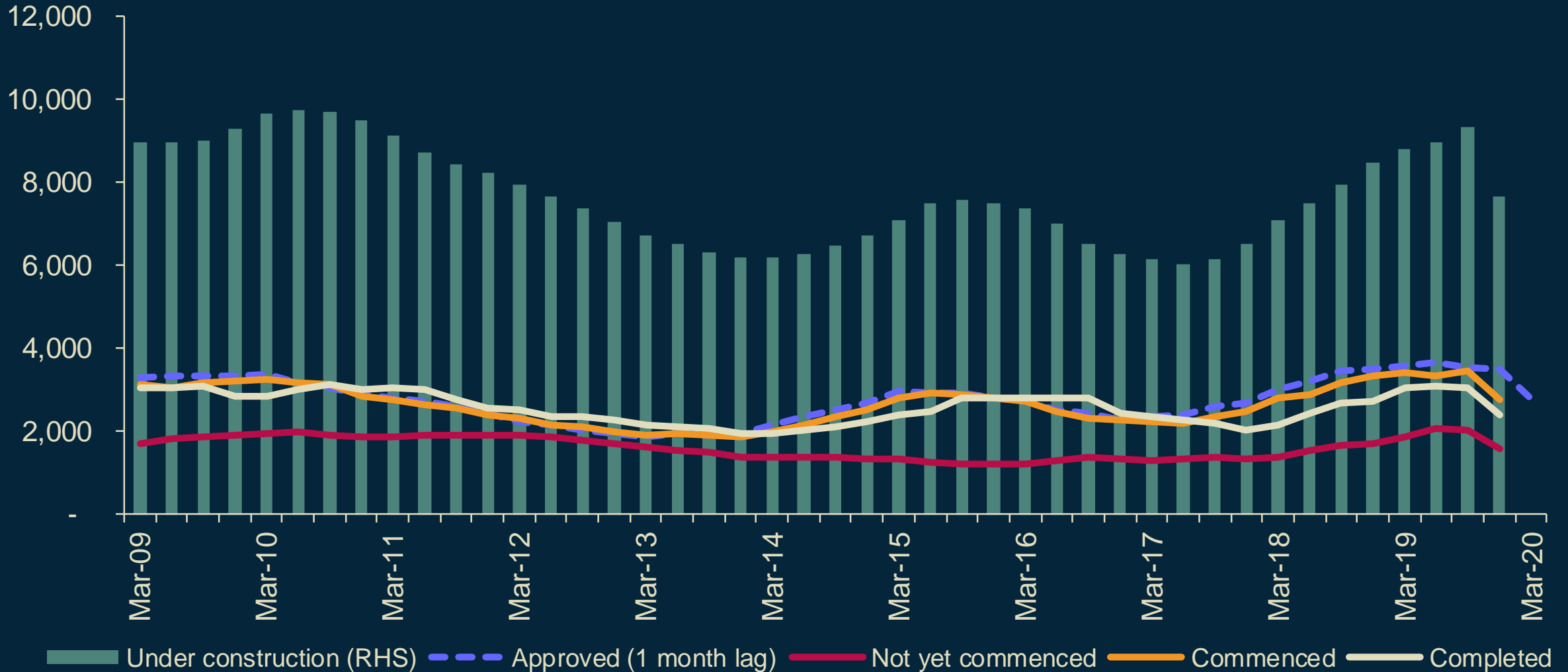
Source: HIA Economics, ABS 8752.0, ABS 8731.0



Detached House Pipeline - TAS

Snapshot of the Building Activity Pipeline - House

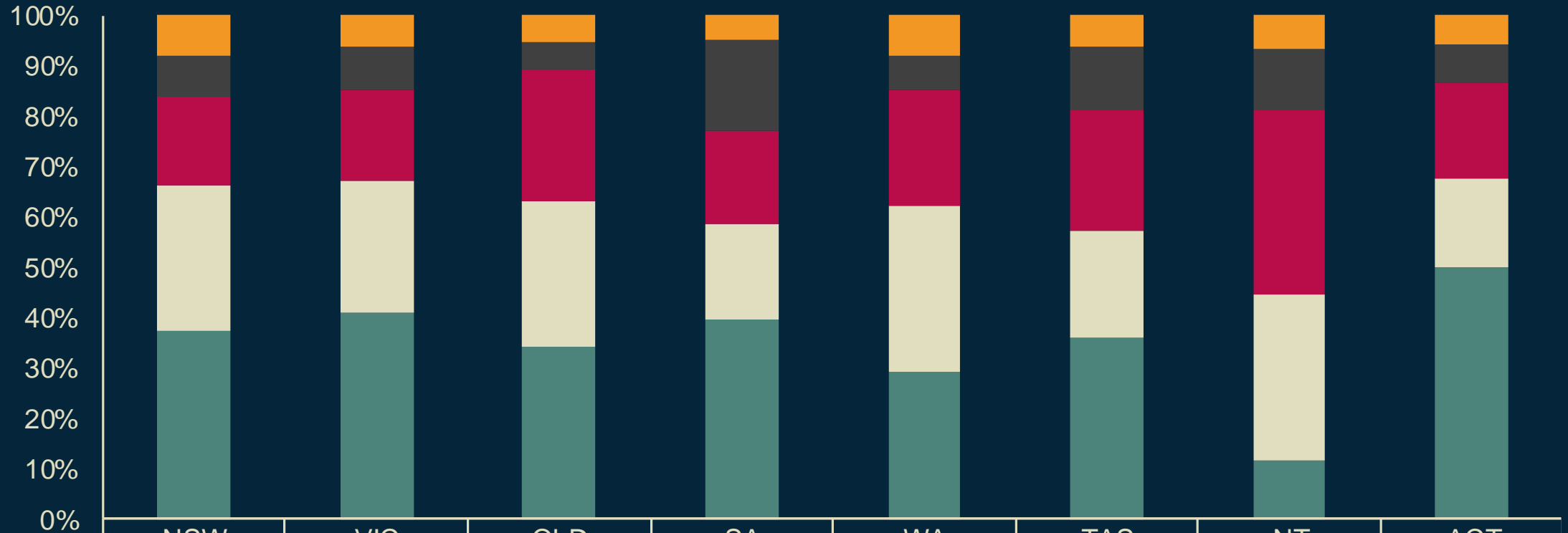
Source: HIA Economics, ABS 8752.0, ABS 8731.0



Migration

Share of Overseas Migration by Visa Type, 2018-19

Source: ABS



	NSW	VIC	QLD	SA	WA	TAS	NT	ACT
Temporary work	13,470	9,020	4,110	1,060	3,080	310	300	450
Permanent work	12,780	12,460	4,080	3,990	2,570	600	570	590
Other	29,450	26,740	19,720	4,010	8,580	1,180	1,690	1,460
Visitor	47,100	38,390	21,680	4,120	12,540	1,030	1,530	1,320
Education	61,760	59,660	25,750	8,650	10,980	1,750	530	3,850

Tourism

Short term Visitors arriving, by Jurisdiction, Mar-19 qtr to Mar-20 qtr

Source: ABS



HIA Trades Report



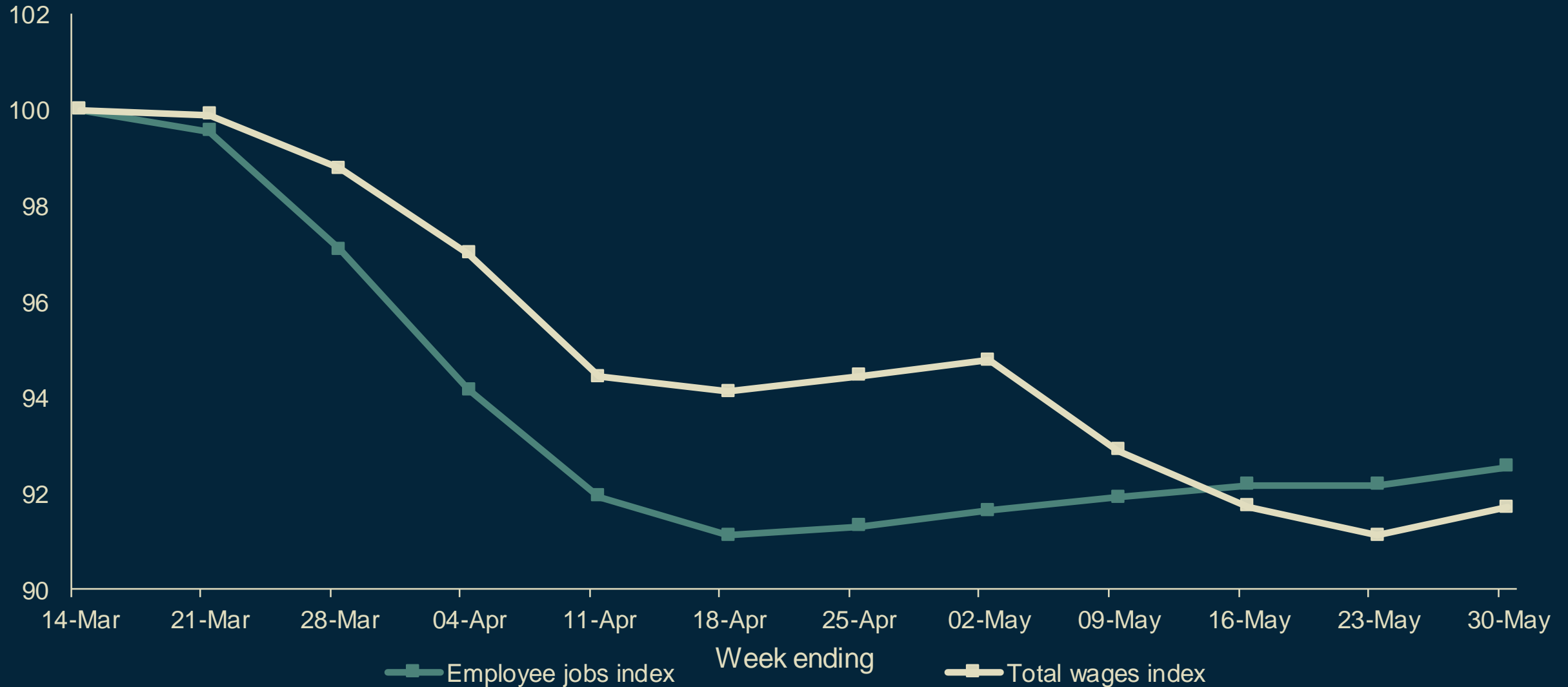
HIA Trades Availability Index by Trade

	Mar-17	Jun-17	Sep-17	Dec-17	Mar-18	Jun-18	Sep-18	Dec-18	Mar-19	Jun-19	Sep-19	Dec-19	Mar-20	Quarterly Movement in Availability
Bricklaying	-0.87	-0.82	-0.88	-0.76	-0.92	-1.13	-0.94	-0.64	-0.96	-0.55	-0.59	-0.64	-0.46	↑
Carpentry	-0.49	-0.29	-0.44	-0.42	-0.36	-0.62	-0.46	-0.34	-0.42	-0.03	-0.05	-0.20	0.08	↑
Ceramic Tiling	-0.50	-0.56	-0.64	-0.53	-0.50	-0.64	-0.64	-0.59	-0.83	-0.38	-0.40	-0.52	-0.24	↑
Electrical	0.07	0.07	0.10	0.03	0.06	0.07	0.04	0.12	-0.09	0.27	0.17	0.23	0.35	↑
General Building	-0.06	-0.17	-0.08	-0.08	0.08	-0.16	-0.18	0.00	-0.28	0.13	0.11	0.11	0.14	↑
Joinery	-0.06	-0.12	-0.09	-0.15	-0.09	-0.13	-0.23	-0.06	-0.16	0.06	-0.05	-0.05	0.15	↑
Landscaping	0.12	0.04	-0.02	-0.03	-0.22	-0.04	-0.14	-0.03	-0.02	0.36	-0.08	0.09	0.10	↑
Other Trades	-0.33	-0.25	-0.42	-0.37	-0.39	-0.58	-0.24	-0.39	-0.57	-0.29	-0.30	-0.12	0.03	↑
Painting	-0.03	-0.02	-0.18	-0.18	-0.09	-0.18	-0.15	0.01	-0.11	0.08	-0.02	0.11	0.14	↑
Plastering	-0.29	-0.44	-0.40	-0.40	-0.43	-0.45	-0.37	-0.27	-0.50	-0.02	-0.26	-0.23	-0.10	↑
Plumbing	-0.10	0.03	0.10	-0.04	-0.04	-0.25	-0.09	-0.01	-0.08	0.10	0.07	0.11	0.24	↑
Roofing	-0.31	-0.31	-0.18	-0.31	-0.19	-0.41	-0.34	-0.29	-0.36	-0.11	-0.25	-0.25	-0.18	↑
Site Preparation	0.00	0.02	-0.02	-0.11	-0.14	-0.24	-0.02	-0.05	-0.15	0.17	0.00	0.09	0.10	↑
All trades	-0.22	-0.22	-0.25	-0.27	-0.25	-0.37	-0.29	-0.20	-0.36	-0.02	-0.13	-0.10	0.03	↑

Workforce

Indexed number of employee jobs and total employee wages, AUS

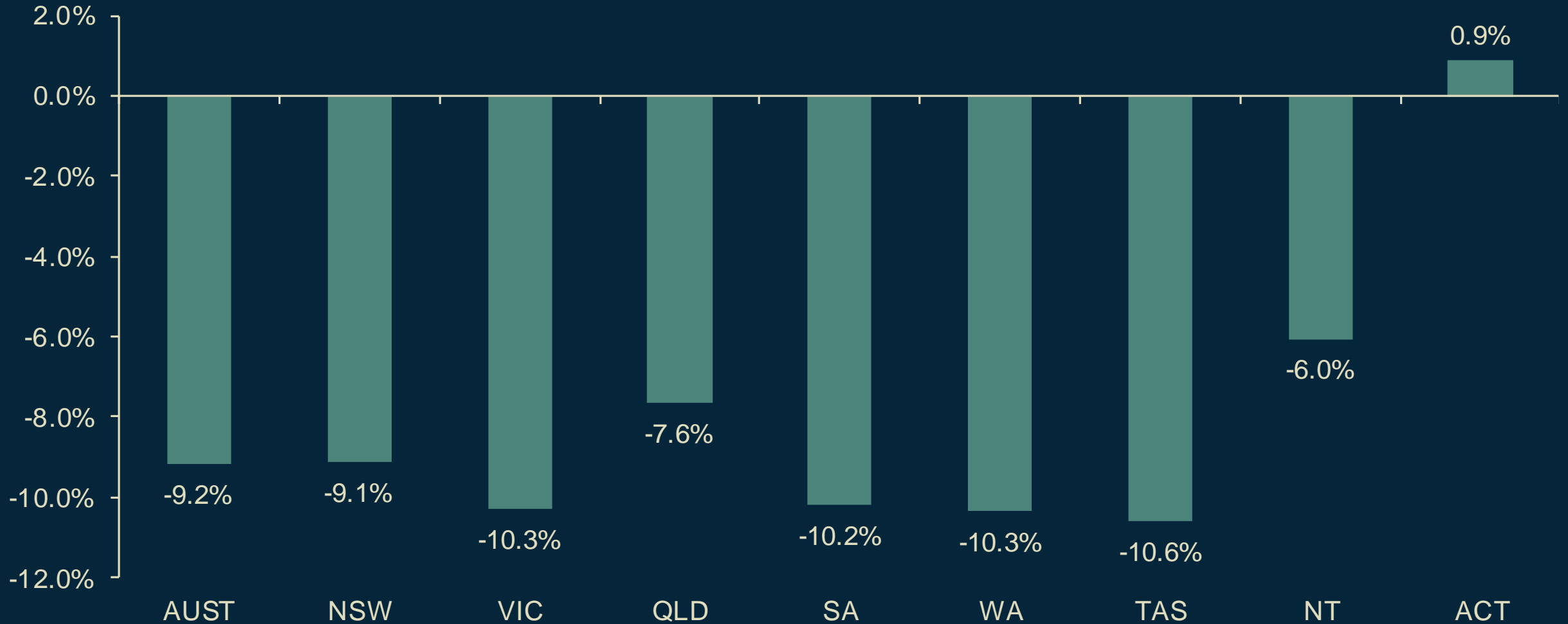
Source: ABS



Workforce

Monthly Change in Aggregate Hours Worked - April 2020

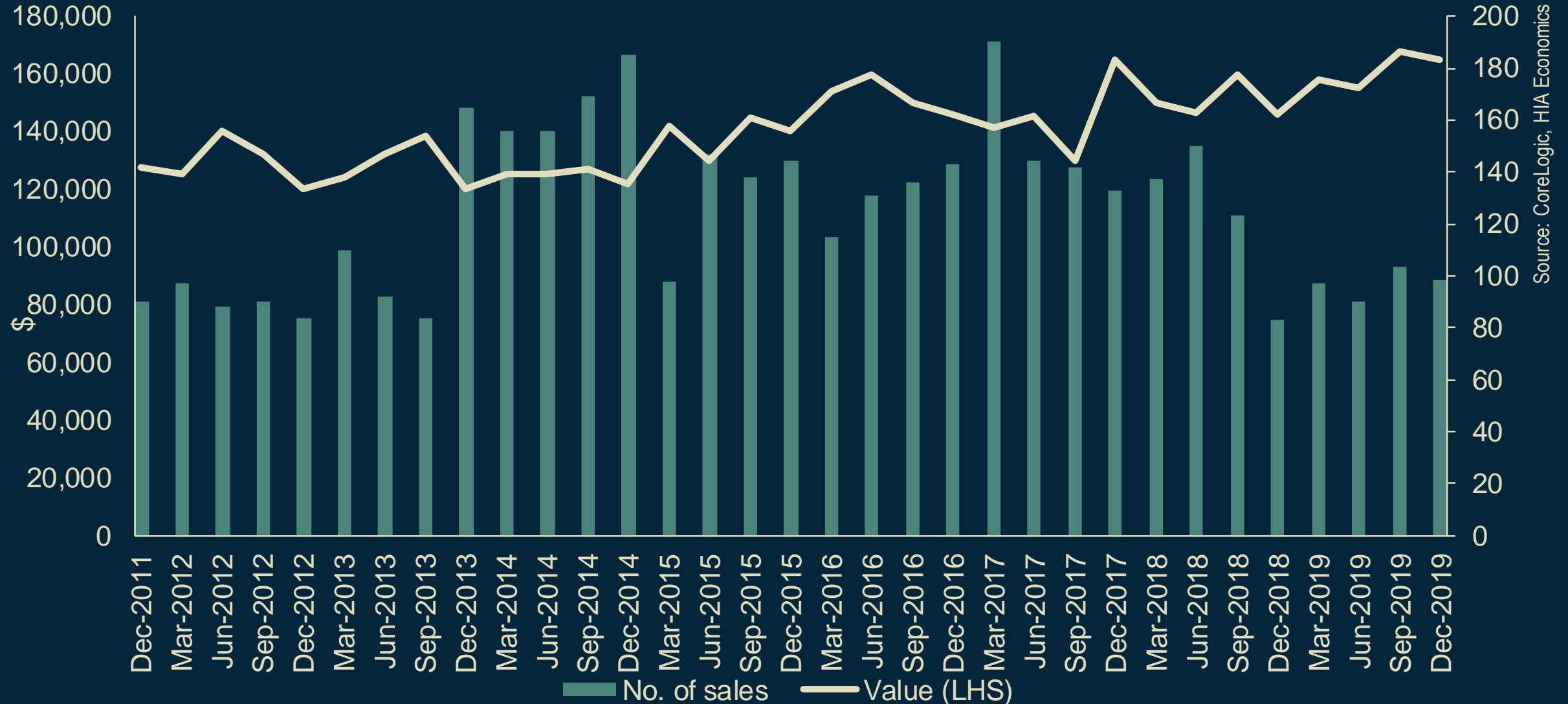
Source: ABS Labour Force



HIA Residential Land Report



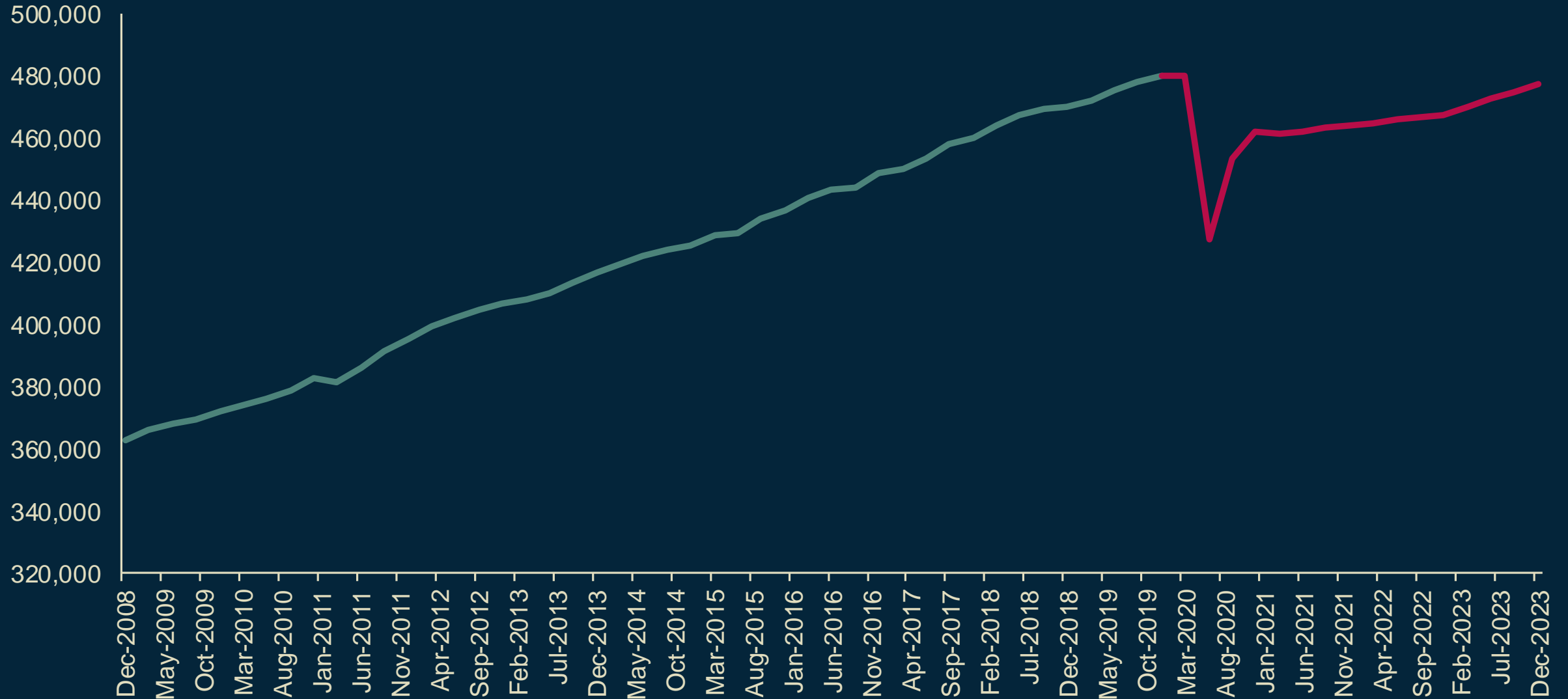
RESIDENTIAL LAND SALES & MEDIAN LOT VALUE - GREATER HOBART



What to expect: The V-Shaped Recovery



GDP Forecasts



Source: ABS, HIA Economics



Thank you

Tim Reardon, HIA Chief Economist