TOURISM NT REGIONAL PROFILE

Kakadu Arnhem

Report Period:
Three year average YE June 2016 – 2018

Annual overnight visitor numbers to the region

<table>
<thead>
<tr>
<th>Year ending June</th>
<th>Visitor Numbers</th>
</tr>
</thead>
<tbody>
<tr>
<td>2016</td>
<td>221,000</td>
</tr>
<tr>
<td>2017</td>
<td>200,000</td>
</tr>
<tr>
<td>2018</td>
<td>176,000</td>
</tr>
</tbody>
</table>

REGION DEFINITION

The regional boundaries of the Kakadu Arnhem tourism region are defined by the Australian Bureau of Statistics (ABS) Cat. No. 9503.0.55.001. For the purpose of this profile, these boundaries have been modified by Tourism Research Australia to not include Litchfield National Park.

What makes up the region

Kakadu National Park
Jabiru
Maningrida
Nhulunbuy
Groote Eylandt
Tiwi Islands

Source note: All information is derived from Tourism Research Australia’s National and International Visitor Surveys unless otherwise stated. For more information on the surveys, please refer to the ‘More Information’ section.
Tourismnt.com.au

Tourist numbers in Kakadu Arnhem

**Kakadu Arnhem overnight visitor numbers, three year average YE June 2016 – 2018***

<table>
<thead>
<tr>
<th>Origin</th>
<th>Intra-Territory</th>
<th>Interstate</th>
<th>Domestic*</th>
<th>International</th>
<th>Totalb</th>
</tr>
</thead>
<tbody>
<tr>
<td>Visitors (000s)</td>
<td>66</td>
<td>102</td>
<td>168</td>
<td>31</td>
<td>199</td>
</tr>
<tr>
<td>Visitor nights (000s)</td>
<td>225</td>
<td>547</td>
<td>772</td>
<td>125</td>
<td>897</td>
</tr>
<tr>
<td>ALOSc</td>
<td>3.4</td>
<td>5.4</td>
<td>4.6</td>
<td>4.0</td>
<td>4.5</td>
</tr>
<tr>
<td>Expenditure ($M)</td>
<td>-</td>
<td>-</td>
<td>133</td>
<td>31</td>
<td>164</td>
</tr>
</tbody>
</table>

a: Domestic = Intra-Territory and Interstate  
b: Total = Domestic and International combined  
c: ALOS – Average Length of Stay  
*Three year averages have been provided to reduce sampling error

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Visitors stayed an average of 4.5 nights  
Interstate travellers made up 51% of visitors to region with holiday travellers making up the majority of this group  
Average visitor spend per year was $164M, which was around $823 per visit

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Kakadu Arnhem Overnight Visitor Trend

![Kakadu Arnhem Overnight Visitor Trend](chart)

*Change in methodology from 2014 – estimates are not comparable to previous years*
WHAT time of year do tourists visit?

Visitation by quarter, three year average YE June 2016 – 2018

Interstate

- March quarter: 23%
- June quarter: 11%
- September quarter: 25%
- December quarter: 41%

Intra-Territory

- March quarter: 25%
- June quarter: 16%
- September quarter: 35%
- December quarter: 24%

International

- March quarter: 30%
- June quarter: 18%
- September quarter: 43%

WHERE do our visitors come from?

Domestic and international source markets
Three year average YE Jun 2016 – 2018

Domestic source market overnight visitor numbers

<table>
<thead>
<tr>
<th>State of origin</th>
<th>Visitors ('000)</th>
<th>Visitor nights ('000)</th>
<th>ALOS (nights)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Intra-Territory</td>
<td>66</td>
<td>225</td>
<td>3.4</td>
</tr>
<tr>
<td>Interstate</td>
<td>102</td>
<td>547</td>
<td>5.4</td>
</tr>
<tr>
<td>NSW - ACT</td>
<td>24</td>
<td>91</td>
<td>3.7</td>
</tr>
<tr>
<td>Vic - Tas</td>
<td>29</td>
<td>197</td>
<td>6.7</td>
</tr>
<tr>
<td>Western Australia</td>
<td>10</td>
<td>29</td>
<td>2.9</td>
</tr>
<tr>
<td>Queensland</td>
<td>34</td>
<td>212</td>
<td>6.3</td>
</tr>
<tr>
<td>South Australia</td>
<td>5</td>
<td>17</td>
<td>3.7</td>
</tr>
</tbody>
</table>

International source market overnight visitor numbers

<table>
<thead>
<tr>
<th>Country of Origin</th>
<th>Visitors ('000)</th>
<th>Visitor nights ('000)</th>
<th>ALOS (nights)</th>
</tr>
</thead>
<tbody>
<tr>
<td>International</td>
<td>31</td>
<td>125</td>
<td>4.0</td>
</tr>
<tr>
<td>Germany</td>
<td>5</td>
<td>14</td>
<td>3.0</td>
</tr>
<tr>
<td>United Kingdom</td>
<td>5</td>
<td>25</td>
<td>5.6</td>
</tr>
<tr>
<td>USA</td>
<td>3</td>
<td>7</td>
<td>2.4</td>
</tr>
<tr>
<td>France</td>
<td>3</td>
<td>10</td>
<td>3.1</td>
</tr>
<tr>
<td>New Zealand</td>
<td>3</td>
<td>8</td>
<td>3.1</td>
</tr>
<tr>
<td>Switzerland</td>
<td>2</td>
<td>7</td>
<td>3.1</td>
</tr>
<tr>
<td>Netherlands</td>
<td>2</td>
<td>4</td>
<td>2.3</td>
</tr>
<tr>
<td>Italy</td>
<td>1</td>
<td>3</td>
<td>2.0</td>
</tr>
<tr>
<td>Scandinavia</td>
<td>1</td>
<td>3</td>
<td>2.3</td>
</tr>
<tr>
<td>Canada</td>
<td>1</td>
<td>2</td>
<td>2.4</td>
</tr>
</tbody>
</table>
**WHO are our visitors travelling with?**

Visitation by travel party type, three year average YE June 2016 – 2018

- **Travelling Alone**: 36% Intra-Territory, 19% Interstate, 34% International
- **Adult Couple**: 13% Intra-Territory, 29% Interstate, 45% International
- **Family Group**: 8% Intra-Territory, 9% Interstate, 10% International
- **Friends and Relatives**: 17% Intra-Territory, 24% Interstate, 9% International
- **Business Associates**: 26% Intra-Territory, 16% Interstate, 2% International
- **Other**: 0% Intra-Territory, 3% Interstate, 0% International

Around 80% of international visitors travelled alone or as a couple.

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**WHAT age are our visitors?**

Visitation by age group, three year average YE June 2016 – 2018

- **15-29**: 26% Intra-Territory, 16% Interstate, 34% International
- **30-39**: 18% Intra-Territory, 19% Interstate, 13% International
- **40-54**: 35% Intra-Territory, 25% Interstate, 21% International
- **55-64**: 19% Intra-Territory, 16% Interstate, 23% International
- **65+**: 1% Intra-Territory, 1% Interstate, 23% International

Almost half of the visitors from interstate were aged 55 years and above, while a third of internationals and a quarter of Territorians were youth travellers.
WHAT transport did they use to get here and around?

Visitation by Transport used, three year average YE June 2016 – 2018

The region is popular for self-drive travellers

Around 35% of all domestic visitors to the region over the three year period were self-drive leisure travellers, which is an average of 59,000 visitors per year.

**Domestic source markets**

NT residents made up 39% of the domestic leisure drive market to the region. Visitors from NSW/ACT and Vic/Tas contributing a combined 35%.

**Length of stay**

Approximately 72% of the domestic leisure drive market stayed for three or less nights.

Length of Stay - Domestic Drive Leisure Market

*Leisure visitors are on a holiday and/or visiting friends and family*
The majority of international visitors who travelled to the Kakadu Arnhem region entered the country through Sydney (35%), and Darwin (23%) with the remainder spread across the other state capital cities.

Ports of entry/exit used by international visitors who visited Kakadu Arnhem three year average YE June 2016-2018

- **DARWIN:**
  - **ENTRY:** 35%
  - **EXIT:** 23%

- **CAIRNS:**
  - **ENTRY:** 2%
  - **EXIT:** 7%

- **PERTH:**
  - **ENTRY:** 12%
  - **EXIT:** 12%

- **BRISBANE:**
  - **ENTRY:** 8%
  - **EXIT:** 9%

- **SYDNEY:**
  - **ENTRY:** 34%
  - **EXIT:** 35%

- **ADELAIDE:**
  - **ENTRY:** 4%
  - **EXIT:** 2%

- **MELBOURNE:**
  - **ENTRY:** 16%
  - **EXIT:** 12%

Other ports of entry and exit include the Gold Coast which accounted for less than 1%.
WHERE else do they go in the Territory?

Kakadu Arnhem holidaymakers visiting the regions
Three year average YE June 2016 – 2018

**GREATER DARWIN**
- Interstate – 64%
- Intra-territory – 2%
- International – 93%

**KATHERINE DALY**
- Interstate – 39%
- Intra-territory – 5%
- International – 52%

**BARKLY**
- Interstate – 17%
- Intra-territory – 0%
- International – 52%

**ALICE SPRINGS & MACDONNELL**
- Interstate – 17%
- Intra-territory – 0%
- International – 17%

**LASSETER**
- Interstate – 14%
- Intra-territory – 0%
- International – 51%

Almost all international and two thirds of interstate visitors to the region also visited Greater Darwin.

WHERE did they go in the Region?

<table>
<thead>
<tr>
<th>Statistical Area Level 2</th>
<th>Annual visit (3 year average)</th>
<th>Proportion of region</th>
</tr>
</thead>
<tbody>
<tr>
<td>Alligator (excl Outer Darwin)</td>
<td>233,000</td>
<td>79%</td>
</tr>
<tr>
<td>East Arnhem</td>
<td>18,000</td>
<td>6%</td>
</tr>
<tr>
<td>West Arnhem</td>
<td>16,000</td>
<td>6%</td>
</tr>
<tr>
<td>Anindilyakwa</td>
<td>np</td>
<td>np</td>
</tr>
<tr>
<td>Nhulunbuy</td>
<td>np</td>
<td>np</td>
</tr>
<tr>
<td>Tiwi Islands</td>
<td>np</td>
<td>np</td>
</tr>
<tr>
<td>Kakadu Arnhem Total</td>
<td>294,000</td>
<td>-</td>
</tr>
</tbody>
</table>

np = not publishable due to low sample size
**WHERE did they stay?**

Visitation by accommodation type used, 
Three year average YE June 2016 – 2018

- **Intra-Territory**
- **Interstate**
- **International**

- **Hotels**
  - 39%
  - 18%
  - 6%

- **Commercial caravan park or camping ground**
  - 19%
  - 13%
  - 0%

- **Backpacker or hostel**
  - 13%
  - 5%
  - 0%

- **Friends or relatives property**
  - 20%
  - 8%
  - 2%

- **Non-commercial caravan or camping**
  - 20%
  - 13%
  - 7%

- **Other accommodation**
  - 37%
  - 35%
  - 4%

*Other accommodation includes other non-commercial property, private accommodation (not friends or family) guest houses/bed and breakfasts, boat/private yacht, accommodation in FIFO location, education institutions and not stated.*

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**What activities did they do?**

- **Visited National Parks** Credit: Shaana McNaught
- **Experience aboriginal art** Credit: Peter Eve
- **Visited Aboriginal sites** Credit: Shaana McNaught
- **Went fishing** Credit: Shaana McNaught
Industry sector news

Kakadu National Park visits are up

YE JUN 16  179,000
YE JUN 17  180,000
YE JUN 2018  191,000

Numbers provided above are based on visit estimates sourced from Parks Australia.

Industry Sentiment for June quarter in 2018 indicates a decrease in visitation

Operator sentiment in regards to the number of visitors to their business is low for the June quarter 2018 compared to last year. Sentiment is sourced from an online poll conducted each quarter by Tourism NT and is designed to provide an alternative source of information to visitation to the national surveys. A summary for the Top End is available on the Tourism NT website.

More information on the surveys:
Visitor number, night and spend estimates are derived from Tourism Research Australia’s (TRA) National and International Visitor Surveys (NVS and IVS). These surveys are based on sample rather than census, and as such, are subject to sampling variability. When using these estimates at the destination level, this variability increases. In order to provide more robust estimates for analysis, results provided in this report are based on the average of the past three twelve month periods – confidence intervals and sample for this period are highlighted in the table below.

Year ending (YE) June 16 – YE June 18

Where available, Tourism NT has provided information from other sources to be used in conjunction with the NVS and IVS estimates. It is recommended that other information sources are also used such as population statistics from the Australian Bureau of Statistics, feedback from local operators, information from local Visitor Centres, data from local councils, Tripadvisor etc.

PLEASE NOTE: Change in methodology for the NVS from 2014 – estimates are not directly comparable to previous years. More information on the change to the NVS methodology is available on Tourism Research Australia’s website.