



Preface

The Department of Tourism and Culture (DTC) engaged Deloitte Access Economics to work with industry and stakeholders to co-develop NT Tourism 2030, the Territory's tourism strategic plan. The new plan will bring together the industry and government to guide priorities and actions through to 2030.

Deloitte Access Economics has been delighted to work with DTC and the NT's tourism industry operators and stakeholders to gather input from across the Territory. These insights will inform the priorities and direction of the strategy, and are an invaluable insight into tourism in the NT.

Deloitte Access Economics hosted forums in Darwin, Jabiru, Katherine, Nhulunbuy, Tennant Creek, Alice Springs and Yulara over two weeks in September, with over 100 representatives attending. Thank you to those who attended for their time and contribution.

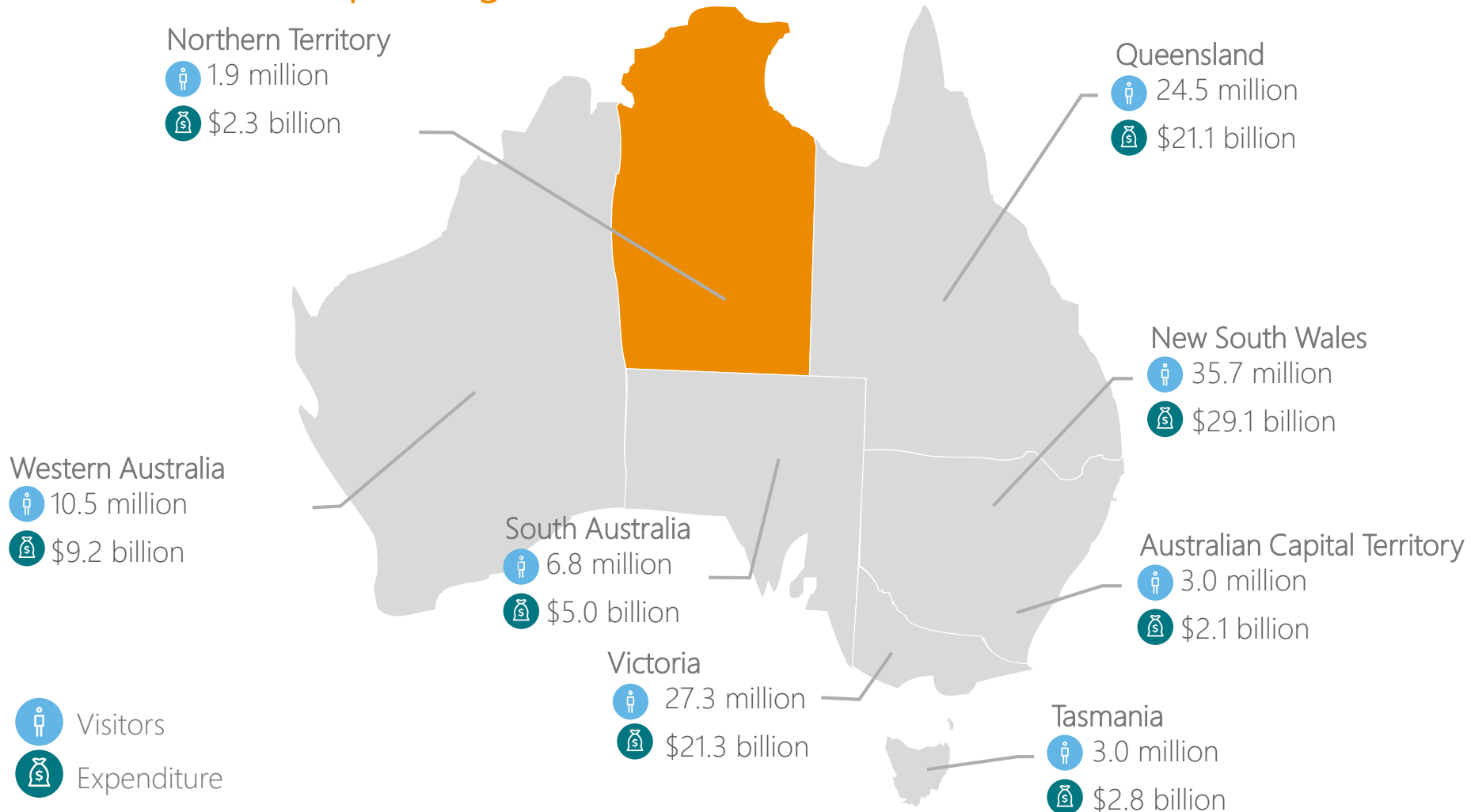
The following slides are a condensed version of those presented at the forums, focusing on key statistics across the Northern Territory, rather than by region. **They have been provided as reference material for those who attended the workshops, as well as to provide context for further submissions for those unable to attend.** Please note that all data provided is current as at December 2017.

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How the Northern Territory compares to Australia in tourism

The Northern Territory welcomed 1.9 million overnight visitors and \$2.3 billion of visitor spending in 2017



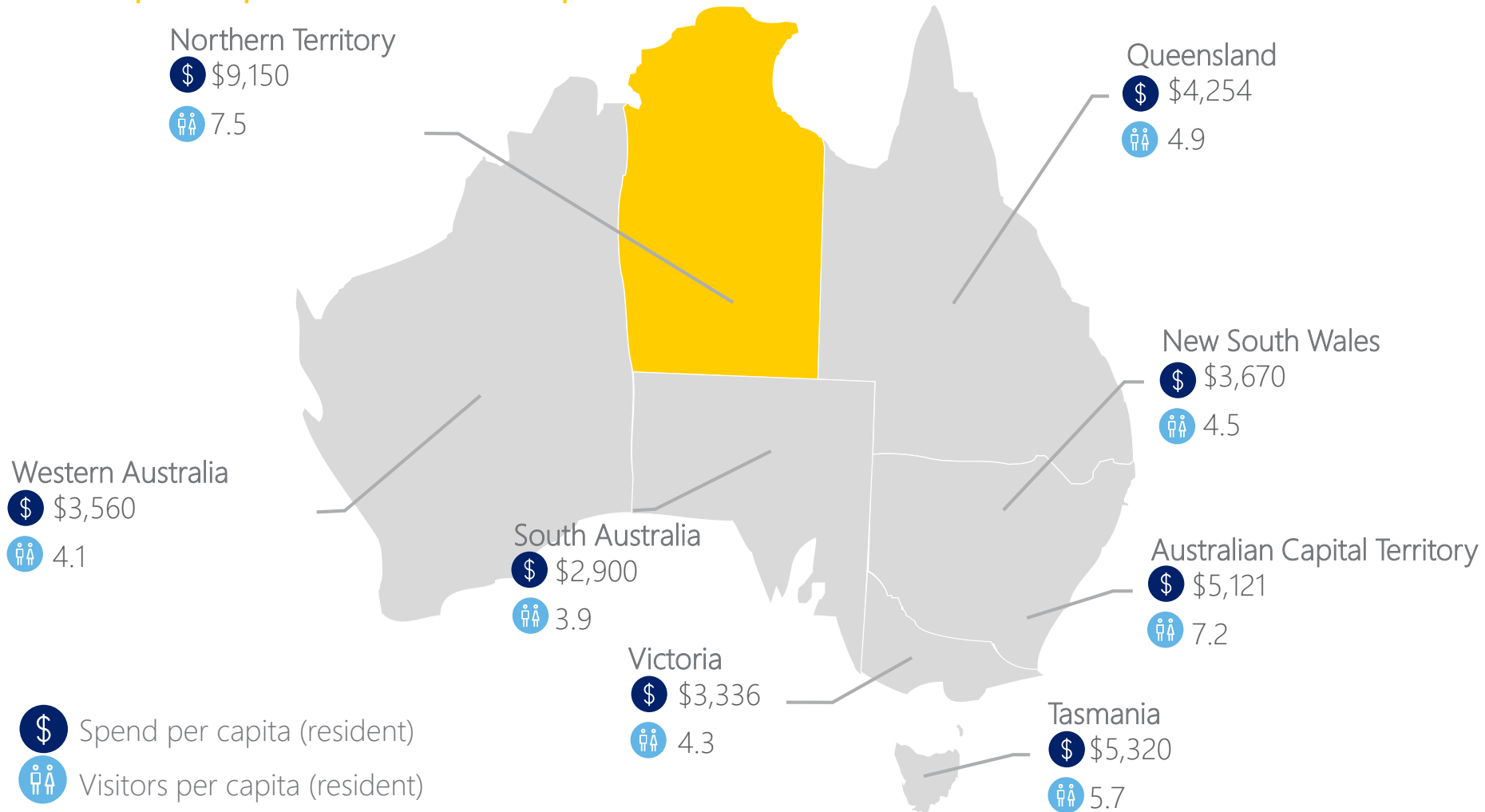
Source: Tourism Research Australia, *National Visitor Survey and International Visitor Survey: year ending December 2017*

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Regional forum presentation

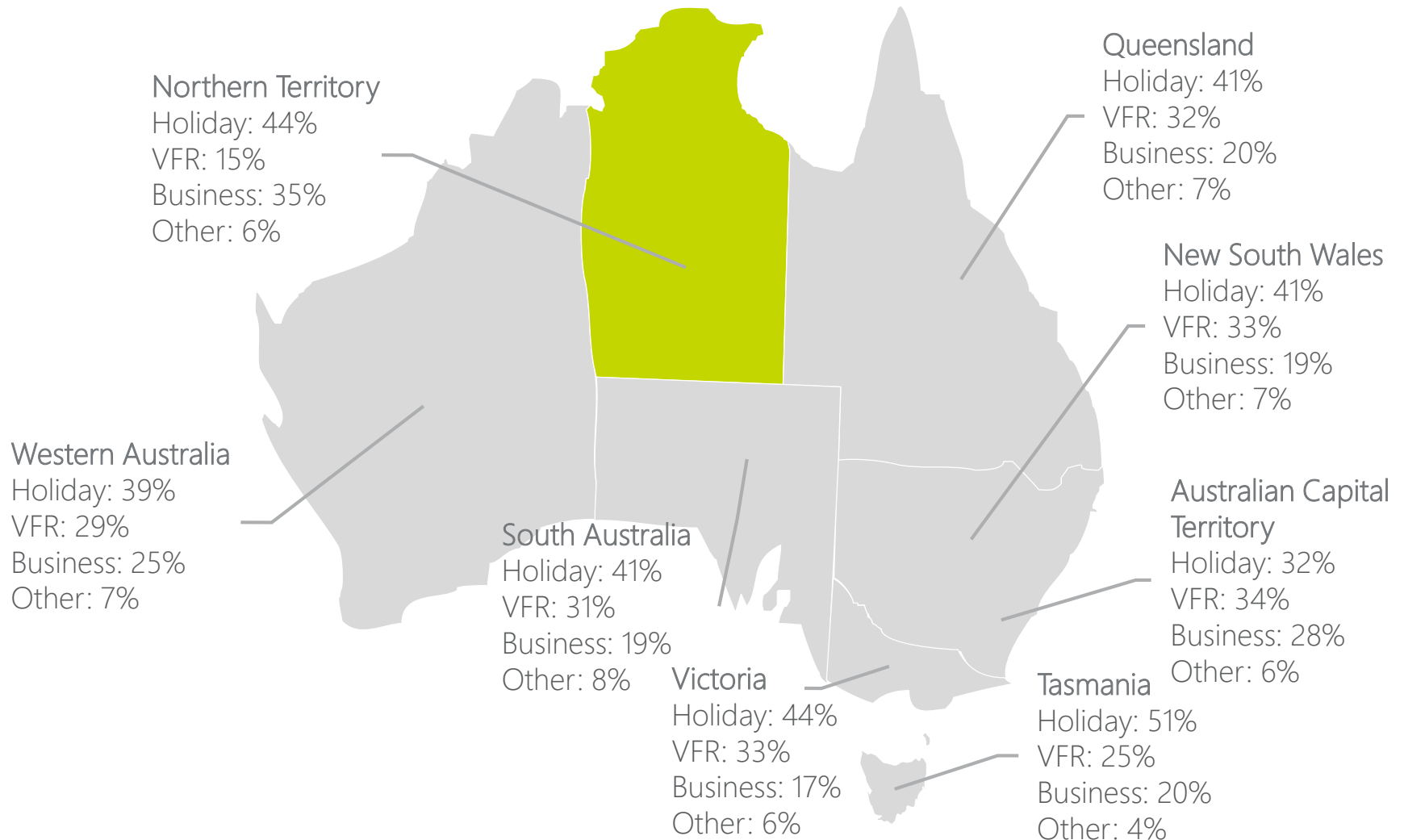
Considering tourism in the NT per capita

The Northern Territory has a significantly higher visitation per resident and spend per resident compared to other states



Comparing the NT to Australia by purpose of visit

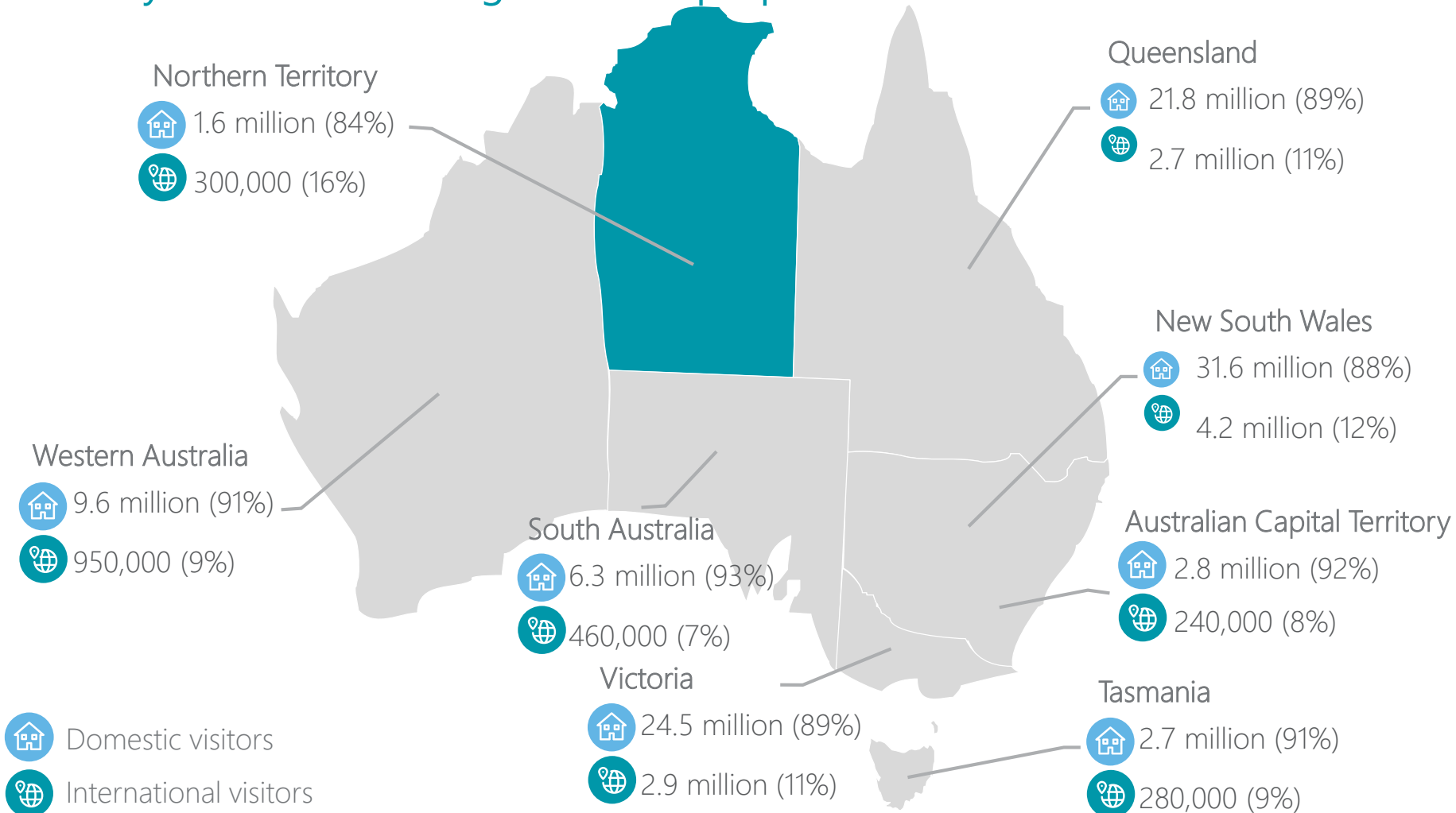
Holiday and business travellers are important to the Northern Territory, but the share of VFR travellers is much lower



Source: Tourism Research Australia, *National Visitor Survey and International Visitor Survey: year ending December 2017*

Domestic and international visitation across Australia

The Territory's share of international visitors is the highest of any state or territory when considering all visitor purposes



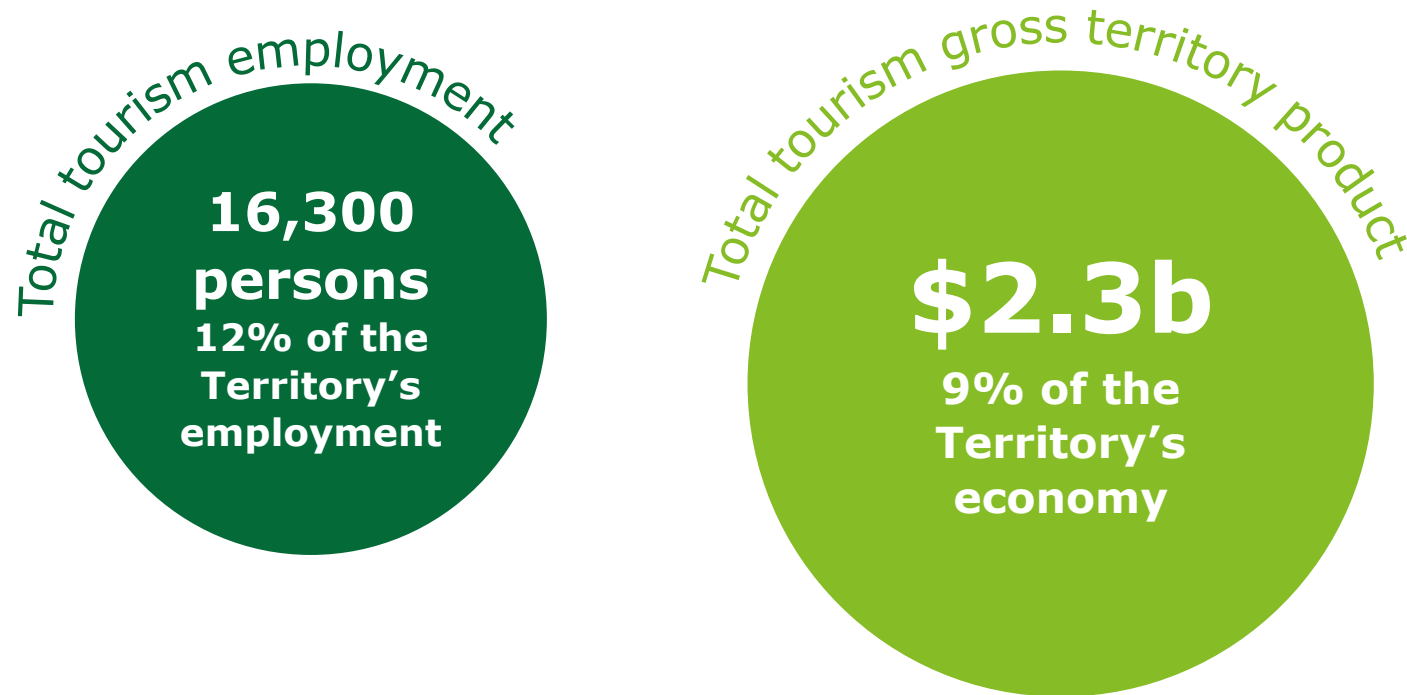
Source: Tourism Research Australia, *National Visitor Survey and International Visitor Survey: year ending December 2017*

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Regional forum presentation

Tourism's value to the Northern Territory

In 2016-17, tourism was worth \$2.3 billion to the Northern Territory's economy in direct and indirect terms



Source: Tourism Research Australia, *State Tourism Satellite Account: 2016-17*

Northern Territory 2017 snapshot – domestic

Business travellers now make up the largest segment of domestic visitors to the NT

Chart 1.1: Reason of travel to the NT



Domestic visitors: 1.6 million



Intra-Territory visitors: 910,000



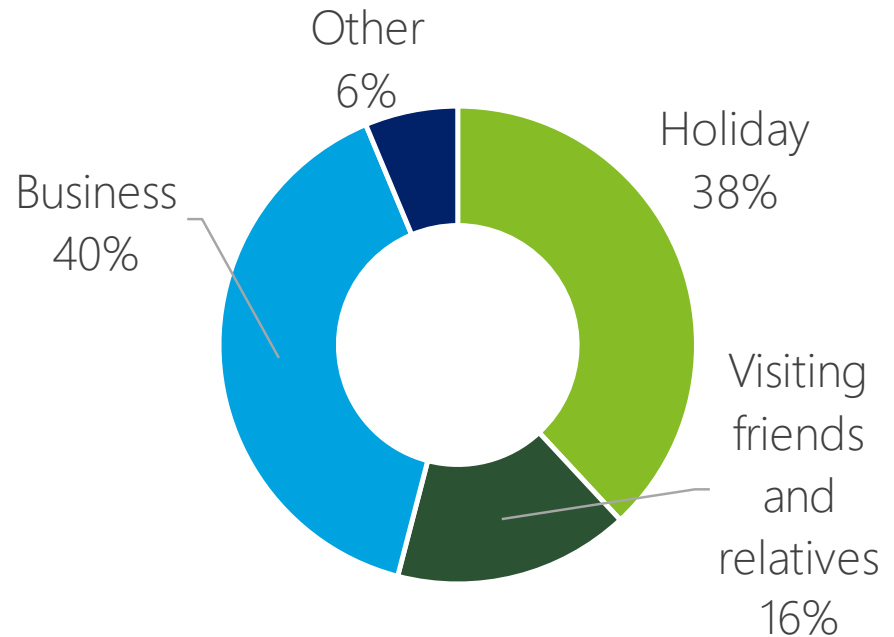
Interstate visitors: 660,000



Average spend per visitor: \$1,143



Total expenditure: \$1.8 billion



Source: Tourism Research Australia, *National Visitor Survey: year ending December 2017*

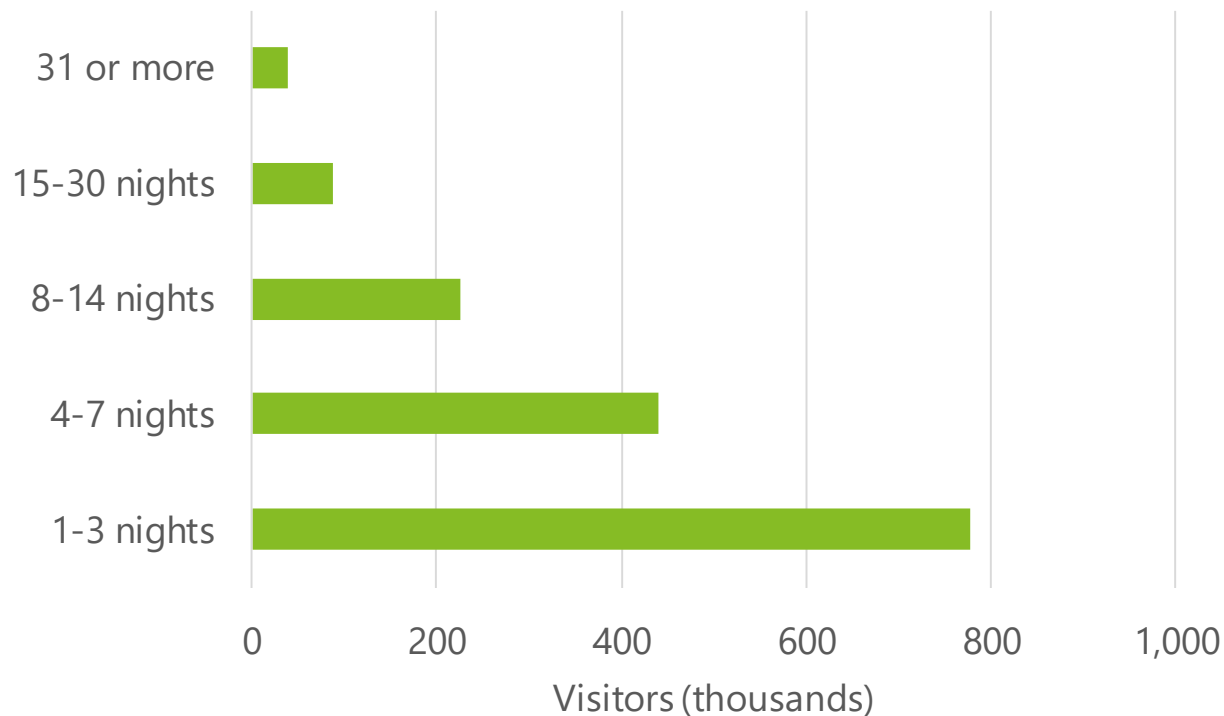
Northern Territory 2017 snapshot – domestic

Half of domestic travellers to the NT stay three nights or less



Average length of stay: 6 nights

Chart 1.2: Length of stay in the NT



Source: Tourism Research Australia, *National Visitor Survey: year ending December 2017*

Northern Territory 2017 snapshot – domestic

Over a quarter of domestic visitor nights are spent in hotels, but a number are also spent in 'other' accommodation, including FIFO accommodation



Total visitor nights: 10,000,000



Nights in hotels:
2,749,000 (27%)



Other commercial:
1,434,000 (14%)



Friends or relatives
property: 1,816,000 (18%)



Other private:
1,565,000 (16%)



Other:
2,453,000 (24%)

Northern Territory 2017 snapshot – international

Holidays is the predominant purpose of travel for international travellers to the NT

Chart 1.3: Reason of travel to the NT



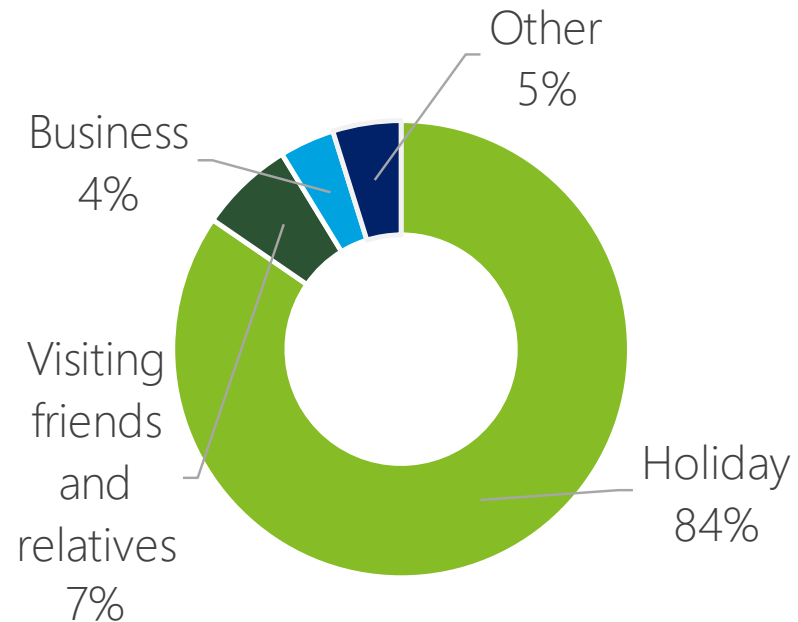
International visitors: 297,000



Average spend per visitor: \$1,600



Total expenditure: \$467 million



Source: Tourism Research Australia, *International Visitor Survey: year ending December 2017*

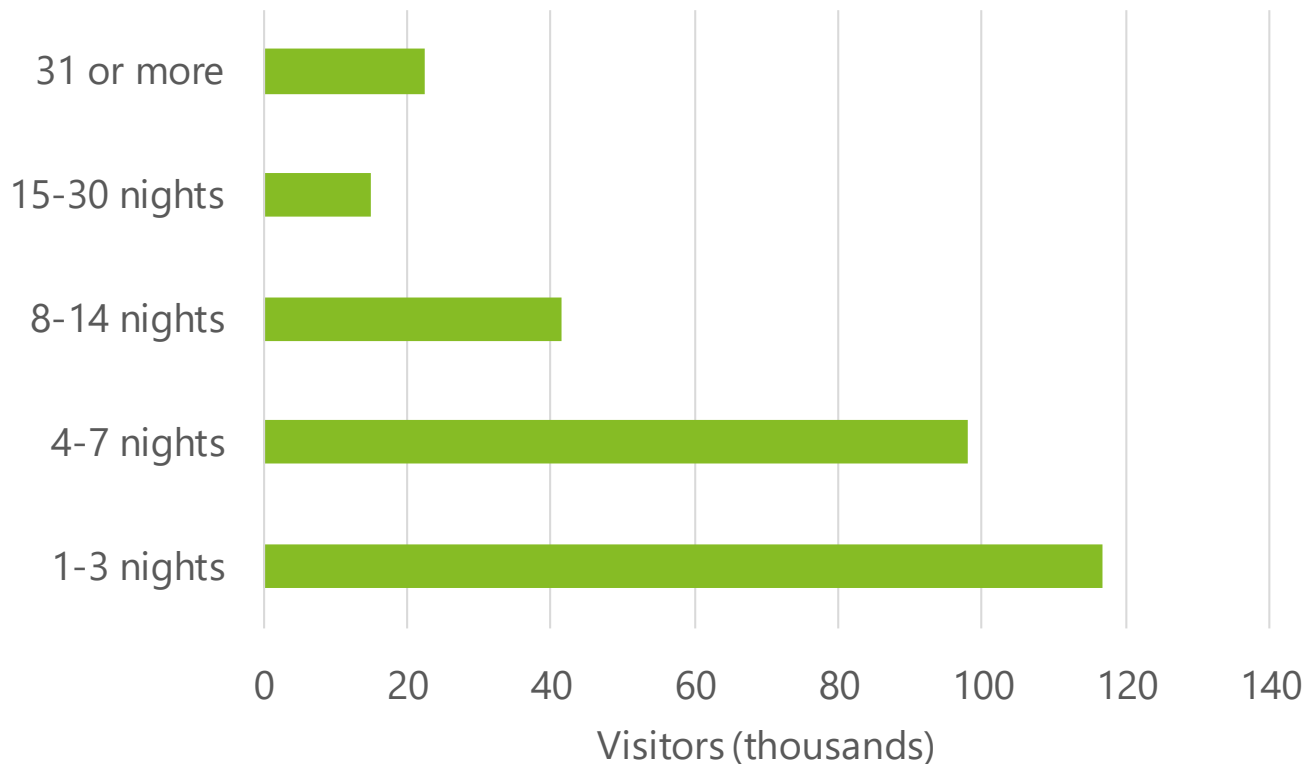
Northern Territory 2017 snapshot – international

International travellers stay on average 13 nights in the NT, however more than two thirds stay for a week or less



Average length of stay: 13 nights

Chart 1.4: Length of stay in the NT

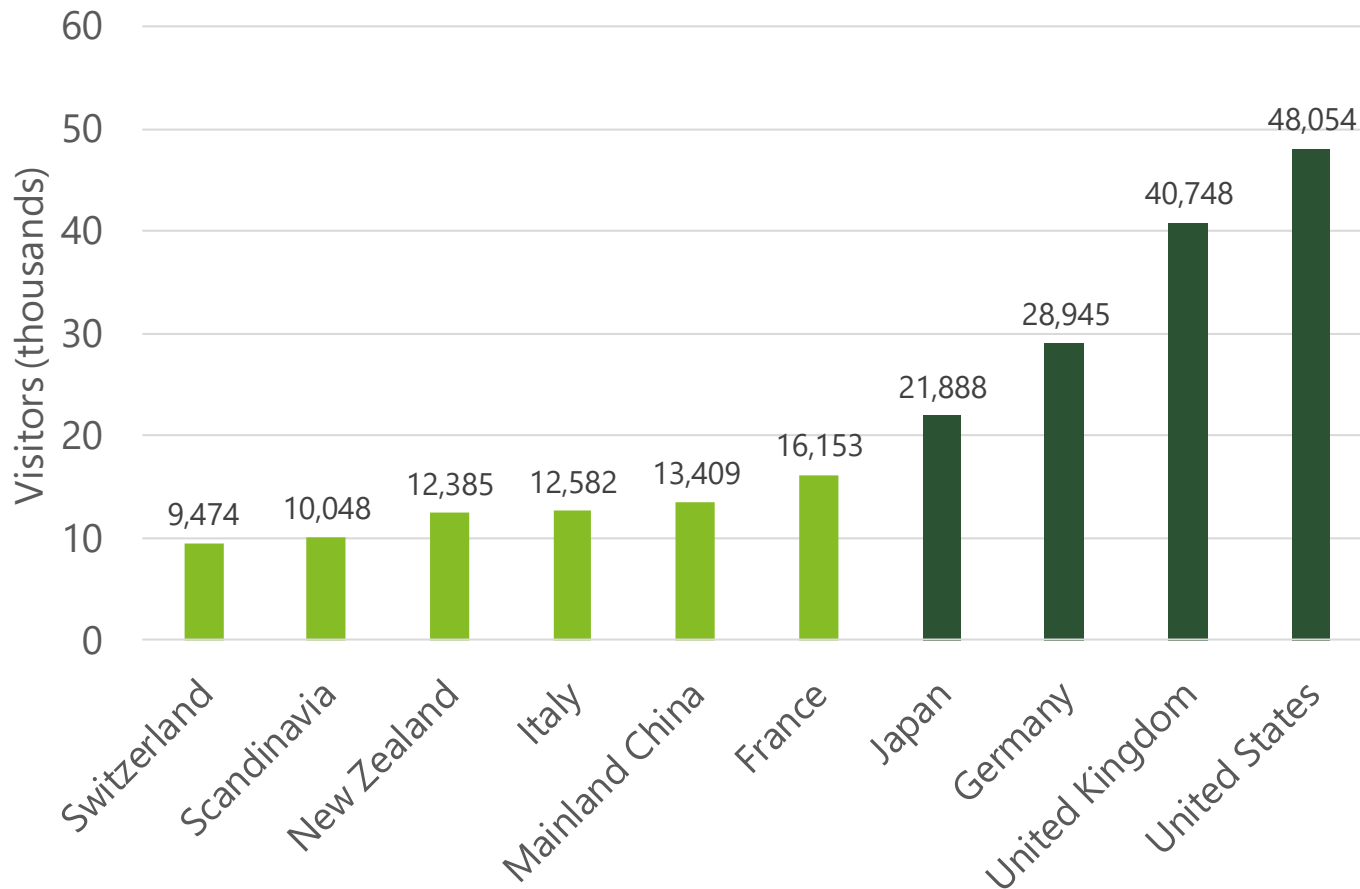


Source: Tourism Research Australia, *International Visitor Survey: year ending December 2017*

Northern Territory 2017 snapshot – international

The top three markets for the NT are the US, UK and Germany – with China ranked sixth among source markets in 2017

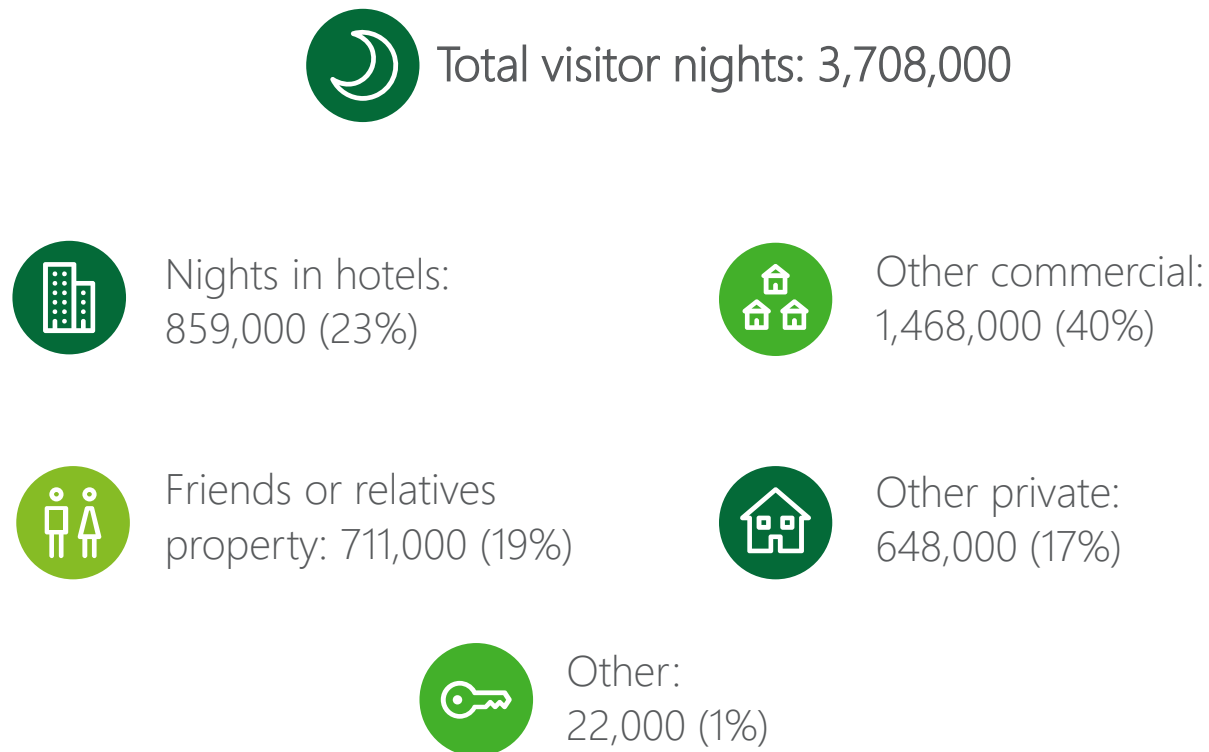
Chart 1.5: International source market of travellers to the NT



Source: Tourism Research Australia, *International Visitor Survey: year ending December 2017*

Northern Territory 2017 snapshot – international

Almost one in four international visitor nights are spent in a hotel, but many nights are spent in other commercial accommodation



Source: Tourism Research Australia, *International Visitor Survey: year ending December 2017*

TOURISM VISION 2020:
NORTHERN TERRITORY'S STRATEGY FOR GROWTH



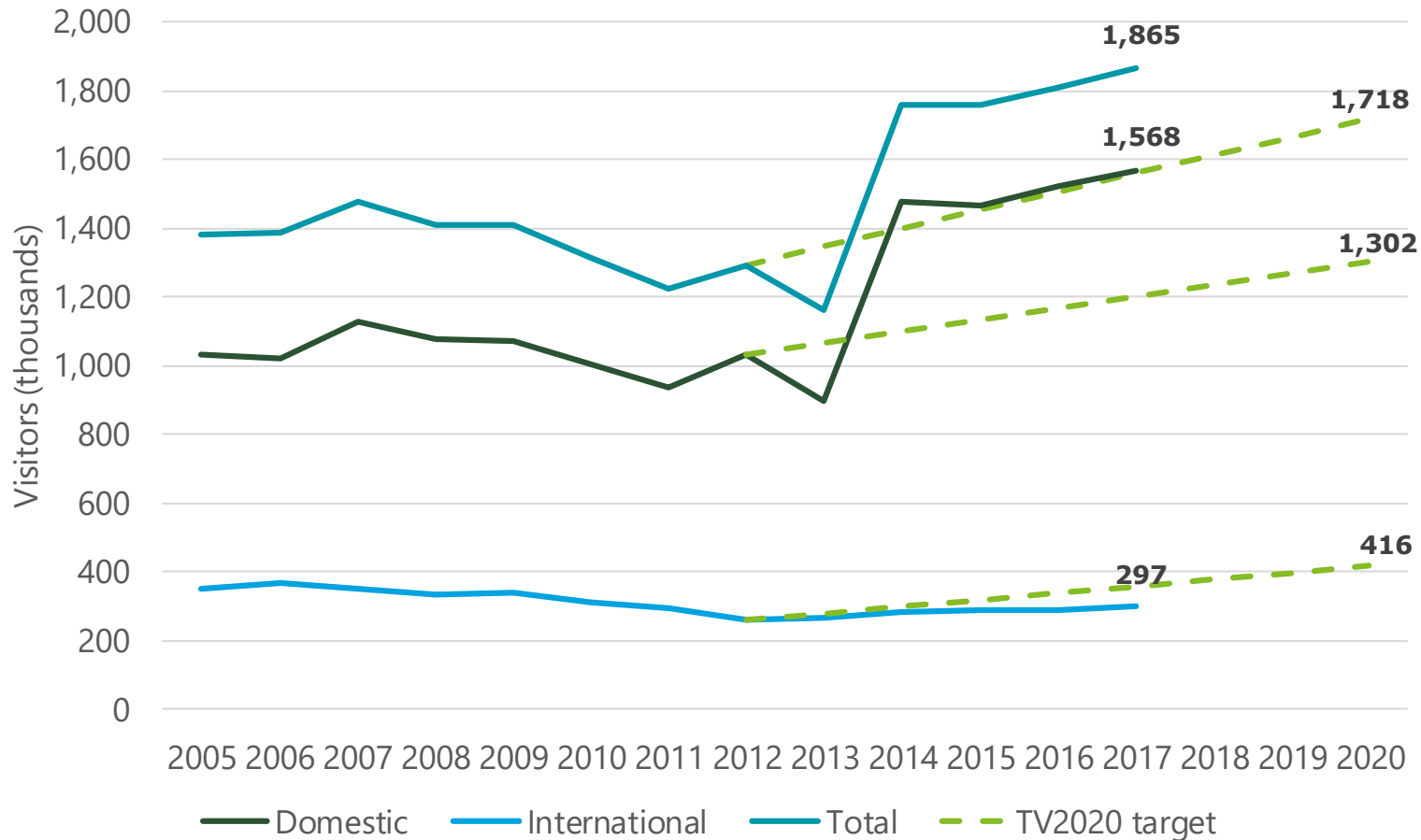
2016-17 Progress Summary
TOURISM VISION 2020



A summary of activities taken across the sector during 2016-17, delivering positive growth and on-track progress toward the Tourism Vision 2020 goals.

Northern Territory *Tourism Vision 2020* – visitation

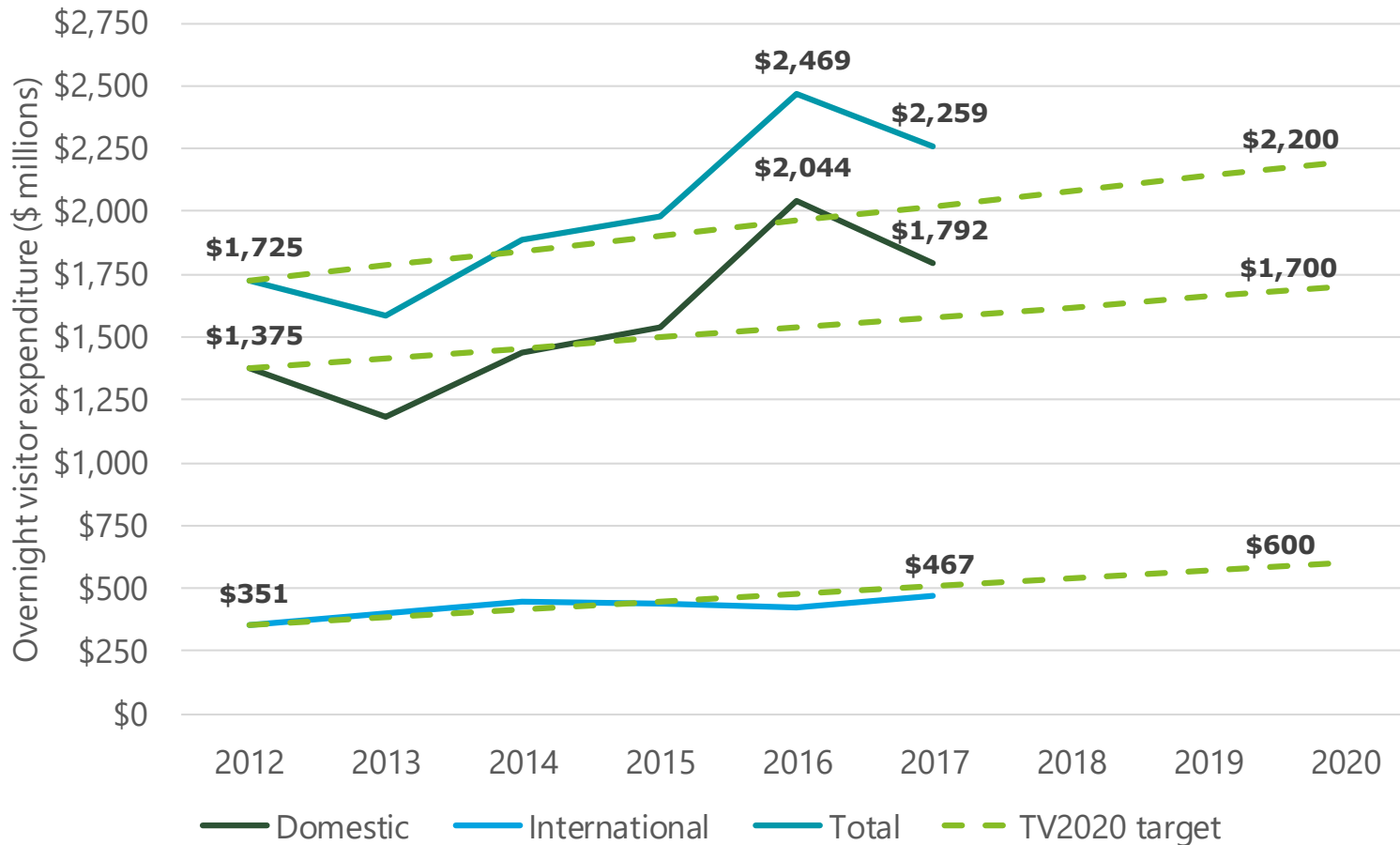
The overall visitation target was 1.7 million visitors by 2020, achieved in 2014



Source: Tourism Research Australia, *National Visitor Survey and International Visitor Survey: year ending December 2017*; NT Tourism, *Tourism Vision 2020: Northern Territory's Strategy for Growth*

Northern Territory *Tourism Vision 2020* – expenditure

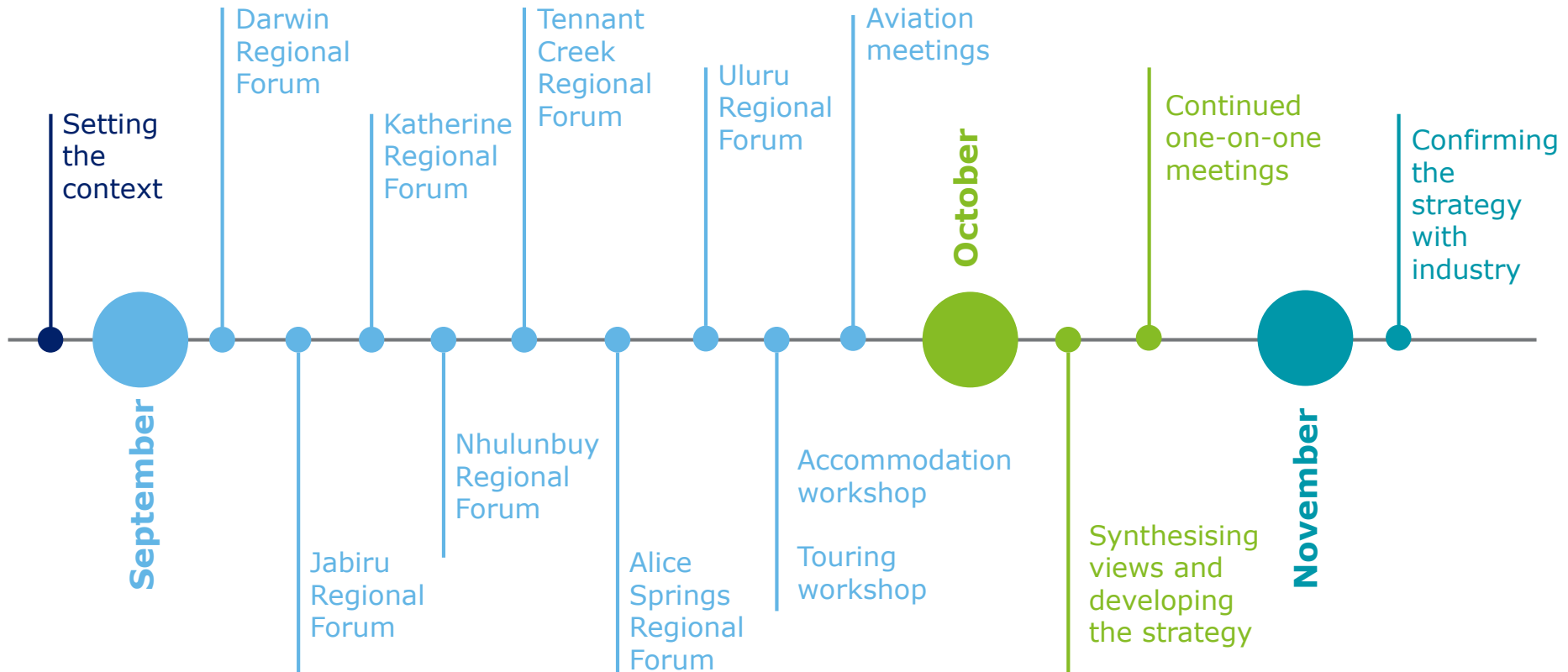
The overall overnight visitor expenditure target of \$2.2 billion by 2020 was surpassed four years early in 2016



Source: Tourism Research Australia, *National Visitor Survey and International Visitor Survey: year ending December 2017*; NT Tourism, *Tourism Vision 2020: Northern Territory's Strategy for Growth*

Timeline

A draft strategy will be developed by the end of 2018, with the strategic themes and actions to be confirmed with industry



Limitation of our work

General use restriction

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