

Background and Objectives

In 2018/19, Tourism NT (TNT) conducted a study to explore whether the tourism products and services across regional Northern Territory (NT) are satisfying visitors. The objective of the study was to measure overall visitor satisfaction as well as specific aspects of the visitor experience in NT tourism regions. These specific aspects include food, national parks, attractions, accommodation (hotels and caravan parks/ camping), events and tours.

Methodology

The study captured visitor feedback through a 5-7 minute online survey and feedback was collected through the following methods:

1. **Tourism NT's free WiFi hotspots** - when a visitor logged on to the free WiFi on their device, they got a prompt to fill out the survey.
2. **Survey tablets** - were placed at four Visitor Information Centres (VIC) across the NT.
3. **Recruit-to-online postcards** - were also placed at the VICs and contained a short version of the survey link printed on them which visitors could then enter into their browser.
4. **Face-to-face intercept surveys** - were conducted in all NT tourism regions to boost sample size and gather more surveys more efficiently.

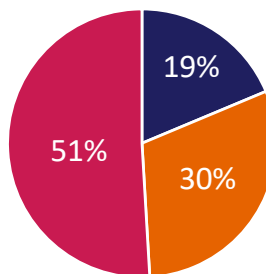
A total of n=701 surveys were completed across the NT and enough sample was collected for each region for valid statistical analysis. The survey was open from October 2018 through to June 2019.

Visitor profile

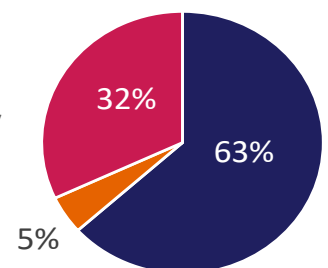


50% 50%

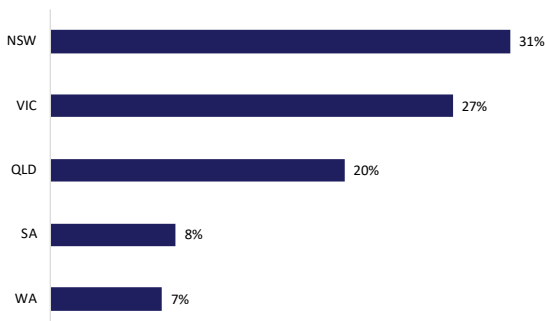
- 18-29 years
- 30-49 years
- 50+ years



- Interstate
- Intra-Territory
- International

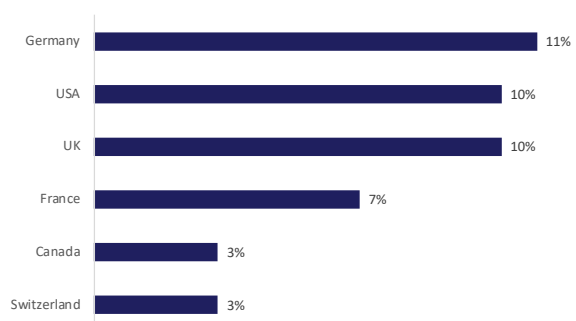


Top 5 domestic source markets by state



Note: Source markets divided by total interstate (n = 444).

Top 6 international source markets by country



Note: Source markets divided by total international (n = 224).

- Of all the household income groups represented, \$30,000-\$59,999 (13%), \$100,000-149,999 (12%) and \$60,000-\$79,999 (11%) were the most prevalent.
- The most common types of travel party were retired couples without children living at home (25%), couples without children living at home (not retired) (21%) and family with children at home (youngest < 16) (13%).
- On average, visitors would be spending 19 nights in the NT on this trip.

Overall satisfaction with visit in the NT

- The best part of visitor experience to the NT was the warmth and hospitality of the people visitors met along their journey.
- Many visitors said the NT is for a certain type of person: someone who wants something out of the ordinary (not boring), adventurous and someone who wants to learn new things.
- Interstate visitors seemed to have a great appreciation of what NT has to offer with many repeat visitors and most seemed to make a concession for aspects of their trip by saying “for what/where it is, it’s pretty good”.
- Intra-territory visitors were highly likely to recommend NT to other people and loved living in the NT, but would like to see improvements such as better variety of food and improved facilities.
- International visitors were less likely to recommend the NT to others than domestic visitors and, while they enjoyed their time in the NT, it was not the greatest adventure of their life.

“I would recommend NT to people if they want to see the bush, the nature as it is, the lagoons, the flora and fauna. We stayed at Mainoru roadhouse and there are people who would give an arm and a leg to go there. It’s for people who want something unique.”

Accessing the NT

- A number visitors mentioned that they came to the NT because there was a good promotion/deal going on. There were comments on the high cost of flying to or even driving to the NT, which highlights the need for airfare and similar package deal promotions to entice interstate visitors.
- There were generally positive comments about signage on NT roads. Interstate visitors who were driving across the Territory appreciated the wide roads.
- There were also many comments praising the tourism efforts and experience in the NT.

“I think tourism in NT is doing great. I like how it is being promoted. NT is tourist friendly.”

“Loving our time in the NT. Please work with airlines to make prices more accessible. The airfares mean it would have been cheaper for us to go to Asia.”

Overall satisfaction with various aspects of visit in the NT



Food

- Many visitors were surprised at the quality of food (and coffee) in the NT as it exceeded their expectations.
- Those with dietary restrictions and those who wanted more healthy and fresh food options (salads and fruits) were disappointed at the lack of variety of this type of food in the NT.

*Extremely/ Very Satisfied	Mean Score (7 point scale)
50%	5.4



National Parks

- Most visitors were incredibly impressed with the natural beauty of the NT.
- While most visitors were satisfied with the facilities in National Parks and along walking/hiking trails, there were comments on facilities needing an upgrade or needing more toilets.

*Extremely/ Very Satisfied	Mean Score (7 point scale)
81%	6.2



Attractions

- Most visitors want to experience authentic Aboriginal culture when they are in the NT.
- The Nyinkka Nyunyu Art and Culture Centre was highly appreciated because of the detailed information that's provided there and there was an Aboriginal guide as well.

*Extremely/ Very Satisfied	Mean Score (7 point scale)
73%	6.0



Hotels

- Visitors appreciated the hospitality of hotel staff across the NT. Hotels in Darwin got higher ratings than in other regions. Accommodation at Cooina (Kakadu National Park) received better feedback than options in Jabiru. Hotels in Katherine were suggested to get an upgrade as their look and feel is very 'dated'. Alice Springs hotels were rated as satisfactory, nothing extraordinary about them from a visitor perspective.

*Extremely/ Very Satisfied	Mean Score (7 point scale)
69%	5.5



Caravan Parks/ Camping

- Most visitors loved their caravan park experience across NT. The exceptions were in Darwin where there are not enough caravan parks closer to the city centre and in Katherine where the caravan park experience varies, depending on the park itself.

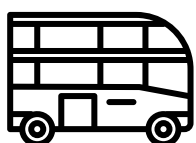
*Extremely/ Very Satisfied	Mean Score (7 point scale)
59%	5.6



Events

- Aside from in Darwin, most visitors did not know what events might be on in the region they were in.

*Extremely/ Very Satisfied	Mean Score (7 point scale)
55%	5.5



Tours

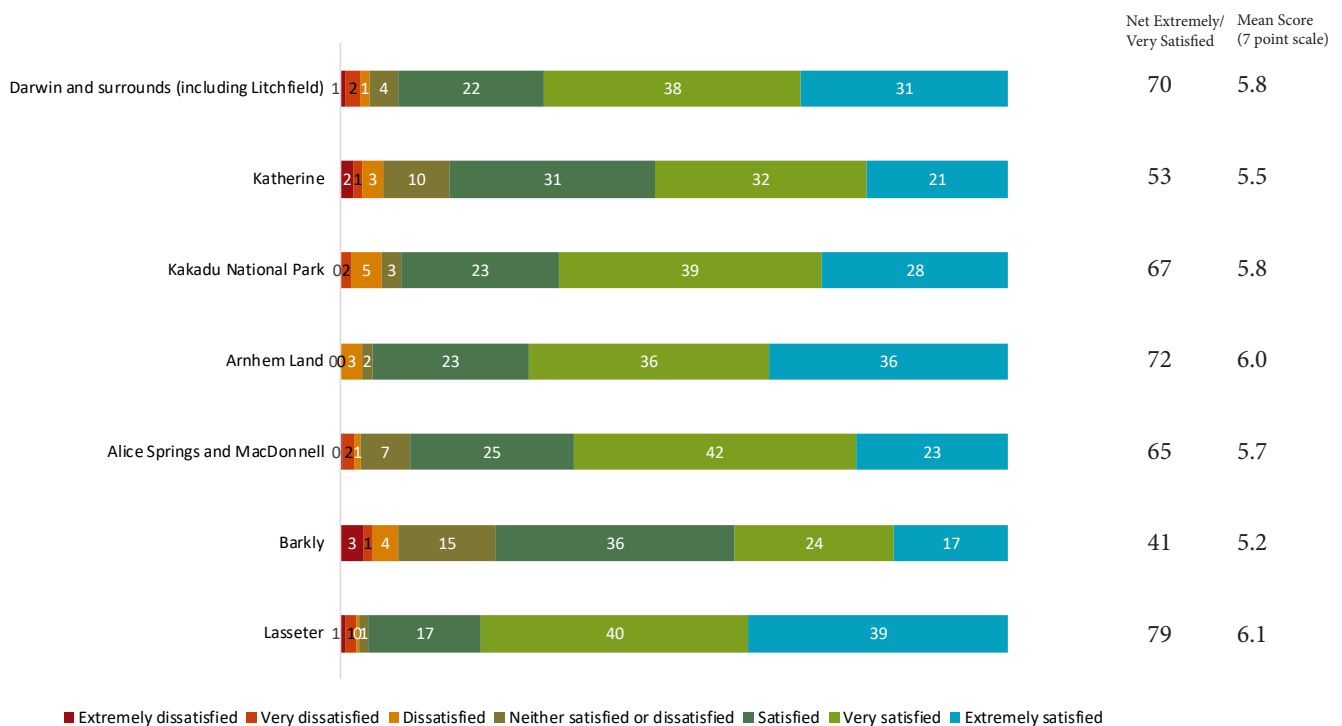
- For the most part, visitors on tours liked their experience. Those with the Ghan and Outback Spirit tours absolutely loved their experience.
- Those who attended park ranger operated information sessions and tours at various National Parks loved them.

*Extremely/ Very Satisfied	Mean Score (7 point scale)
69%	5.8

*Total NT score calculated based on the following question: Thinking of the NT region you are currently visiting (or most recently visited if you have left the NT), overall how satisfied are you with the following aspects of your experience in that region? On a 7 point scale: Extremely dissatisfied, Very dissatisfied, Dissatisfied, Neither satisfied or dissatisfied, Satisfied, Very satisfied, Extremely satisfied.

Overall satisfaction by regions

Visitors were asked to rate their overall satisfaction with the NT regions they had visited in the last 12 months, keeping in mind all their experiences. Lasseter region received the highest overall satisfaction score, followed by Arnhem Land – these scores are primarily due to the unique, natural sites in the region.



Darwin and surrounds (Including Litchfield)

- Visitors to Darwin were overall fairly satisfied with their time in the area. Those who went to Litchfield National Park said it was a highlight of their stay.
- Hotels in Darwin got higher ratings than most other regions. Many visitors staying at hotels were satisfied with their experience and some thought that their hotel stay was excellent value for money.
- Caravan parks in Darwin got lower scores than those staying in hotels in the area. Most caravan parks were not deemed to be close enough to the city center and attractions.
- Food in Darwin and surrounds got higher ratings than most other regions in the NT. There is a larger variety and selection of food in Darwin and the variety is appreciated.
- There were a number of comments on how great the visitor experience at the Royal Flying Doctor Service (RFDS) site was. People especially enjoyed the virtual reality aspect.

Katherine

- A lot of people didn't seem to know about Katherine Hot Springs or how accessible it is. In contrast, Mataranka and Bitter Springs are the bigger attractions.
- For hotels, while the rooms are functional and comfortable enough, the décor and overall look is very dated and needs a cosmetic refresh.
- The Katherine Gorge was liked by those who went there but was seen as being too commercialised by some.
- Food in Katherine region got mixed reviews. For those who already love the standard pub, 'outback' style food, their experience was good. They found the portions plentiful and the food delicious. But those who wanted healthier, fresh food options and food that caters to dietary requirements were disappointed.

Kakadu National Park

- The vast majority of visitors to Kakadu National Park loved their time there. However, there is lack of awareness of what visitors can do during the Wet Season.
- There were mixed reviews about the accommodation in Jabiru, whereas accommodation and food in Cooina had better feedback.
- The Warradjan Cultural Centre was appreciated by those who visited it. Visitors found the detailed information provided useful. Some people were disappointed that there was not an Aboriginal person on site to talk to them or explain things.
- Those who took specific tours while in the park were overall satisfied with their experience. The Yellow River Cruise tour in particular was highly praised.

Arnhem Land

- Nhulunbuy/Gove is the main 'town' and has two accommodation options. Walkabout Lodge is the one most used by short-term visitors and is also the only campground option here. The other motel is more occupied by longer term residents.
- The accommodation at Walkabout Lodge is deemed average/satisfactory and the most common comment was that for 'where it is and what it is, it's fine'. Campers were having a good time. Those with Outback Spirit tour (the only tour operator to operate in the region) were really enjoying their experience and they got to visit parts of Arnhem Land that a lay person would not have any knowledge on how to get there.
- Almost everyone who went to the Yirrkala art center was 'blown away'. However, to visit natural spots there seemed to be a lack of information on where to go, what is required (e.g. permits, 4WD) and how to get there.
- Food is mostly found at Walkabout Lodge and there are a couple of other cafes in Nhulunbuy. For most, food was quite good. However, there is a lack of variety and a recommendation was to use local, seasonal produce and bush tucker ideally.

Alice Springs and MacDonnell

- Most enjoyed their time in Alice Springs and found it to be a satisfactory experience. For many it is a base for heading out to the different gorges and natural sites in the Alice Springs and MacDonnell region. The national parks in the region are the highest rated aspect of the stay.
- Those on tours in the region spoke highly of their experiences, especially those on the Ghan.
- Those staying at caravan parks loved it and were rated higher than hotels in the region. Hotels were deemed satisfactory enough – they do the job for a short-term stay. Food in Alice Springs and MacDonnell region was rated as satisfactory.
- Main attractions that people visited in Alice Springs were the Royal Flying Doctor Service (RFDS) site, Anzac Hill and the various Aboriginal art galleries.

Barkly









- For most, Tennant Creek was 'on their way to somewhere else'. For a handful, their time in Tennant Creek was part of their Barkly experience which includes Devils Marbles/Karlu Karlu and Elliot.
- Some who camped at Devils Marbles/Karlu Karlu complained about the facilities. A few were willing to pay more for better camping facilities at the site. Those camping at caravan parks were quite satisfied with the facilities.
- The Nyinkka Nyunyu Art and Culture Centre in Tennant Creek was given top marks by those who went there. They especially appreciated the detailed information provided as part of the exhibits and a tour by an Aboriginal guide.
- Almost everyone who went to the Battery Hill Mining Center was impressed by its presentation, knowledgeable staff and the entertaining tour.
- Most were fairly happy (and surprised) with the food available in Tennant Creek, although there were suggestions for improving the variety to cater for different dietary needs. People also want more bush tucker.

Lasseter

- Uluru is one of the highlights of a trip to the Northern Territory. There were many people who were visiting NT for only 3 or 4 days and were there just to see Uluru – it is a bucket list spot for many domestic and international visitors.
- Visitors to Uluru found Kata Tjuta very impressive, for some, even more so than Uluru. These visitors wondered why this site is not as promoted as Uluru and in fact, they did not know it existed until they got to Yulara.
- Visitors loved Kings Canyon itself and the rim walk was a highlight of their trip to the area.
- Field of Light was a hit with almost everyone who went there.
- Hotels in the Lasseter region got a higher satisfaction rating than caravan parks. Some of the caravan park users said their sites were smaller than other parks and that maybe more kitchen facilities would have made their stay a bit better. The cost of visiting and staying at Uluru is seen as expensive by many.

Destination satisfaction in Northern Territory regions

Satisfaction with various aspects of visit by regions

TOP END SATISFACTION ASPECTS	Darwin and surrounds (including Litchfield)		Katherine		Kakadu National Park		Arnhem Land	
	*Extremely/ Very Satisfied	Mean Score (7 point scale)	*Extremely/ Very Satisfied	Mean Score (7 point scale)	*Extremely/ Very Satisfied	Mean Score (7 point scale)	*Extremely/ Very Satisfied	Mean Score (7 point scale)
 Food	64%	5.7	51%	5.2	52%	5.2	57%	5.6
 National Parks	77%	6.1	82%	6.0	78%	6.2	87%	6.4
 Attractions	68%	5.9	73%	6.0	67%	5.7	83%	6.3
 Hotels	61%	5.6	29%	5.0	67%	5.7	41%	5.1
 Caravan Parks/ Camping	48%	5.4	67%	5.7	52%	5.6	73%	5.6
 Events	55%	5.5	58%	5.8	43%	5.3	33%	5.0
 Tours	68%	5.8	65%	5.8	73%	5.8	100%	6.4
 Overall Satisfaction with Region	70%	5.8	53%	5.5	67%	5.8	72%	6.0









*Thinking of the NT region you are currently visiting (or most recently visited if you have left the NT), overall how satisfied are you with the following aspects of your experience in that region? On a 7 point scale: Extremely dissatisfied, Very dissatisfied, Dissatisfied, Neither satisfied or dissatisfied, Satisfied, Very satisfied, Extremely satisfied.

“RFDS was very very good. Bombing of Darwin was excellent. Virtual reality experience was very good.”

“The yellow water tour was fantastic. It was the perfect amount of time, had a great tour guide and we saw some beautiful country.”

“Outback Spirit. Lovely and friendly. Really good tour they have organised. Its exceptional. Years ago we went to Kakadu and added Arnhem Land as an add on. Arnhem Land was better than Kakadu. Fourth time here. The birds and water channels are nothing like you have seen before.”

Destination satisfaction in Northern Territory regions

CENTRE SATISFACTION ASPECTS	Alice Springs and MacDonnell		Barkly		Lasseter	
	*Extremely/ Very Satisfied	Mean Score (7 point scale)	*Extremely/ Very Satisfied	Mean Score (7 point scale)	*Extremely/ Very Satisfied	Mean Score (7 point scale)
 Food	45%	5.4	53%	5.5	39%	5.1
 National Parks	78%	6.1	74%	5.9	89%	6.5
 Attractions	68%	5.8	72%	6.0	88%	6.2
 Hotels	50%	5.5	46%	5.1	59%	5.6
 Caravan Parks/ Camping	63%	5.7	62%	5.6	51%	5.5
 Events	55%	5.5	61%	5.7	55%	5.5
 Tours	73%	5.9	54%	5.2	66%	5.9
 Overall Satisfaction with Region	65%	5.7	41%	5.2	79%	6.1

*Thinking of the NT region you are currently visiting (or most recently visited if you have left the NT), overall how satisfied are you with the following aspects of your experience in that region? On a 7 point scale: Extremely dissatisfied, Very dissatisfied, Dissatisfied, Neither satisfied or dissatisfied, Satisfied, Very satisfied, Extremely satisfied.

“Uluru is impressive and a wow factor. I had one of those wow factors before when I saw New York, the Manhattan skyline. I said oh wow. Uluru had the same effect.”

“Hot air balloon, Desert park. Really enjoyed that. Royal Flying Doctor and Women’s Pioneer museum were great.”

“Bloody brilliant! All the attractions I’ve been to have provided lots of info about local stuff. They also appear to be eco friendly and well built as to fit with the layout of the land.”

“Did the Palm Valley tour with AAT Kings, it was a full day tour. Didn’t have to drive. Guides, bus and landscape were wonderful. Also went to Flynn’s grave and Hermannsburg on the same tour. At Anzac Hill loved the plaques.”

Destination satisfaction in Northern Territory regions

Net promoter score for NT as a place to holiday

Overall likelihood to recommend

The overall Net Promoter Score (NPS) for visitors is 54. Two thirds of these visitors are promoters and likely to recommend the Northern Territory as a place to holiday.

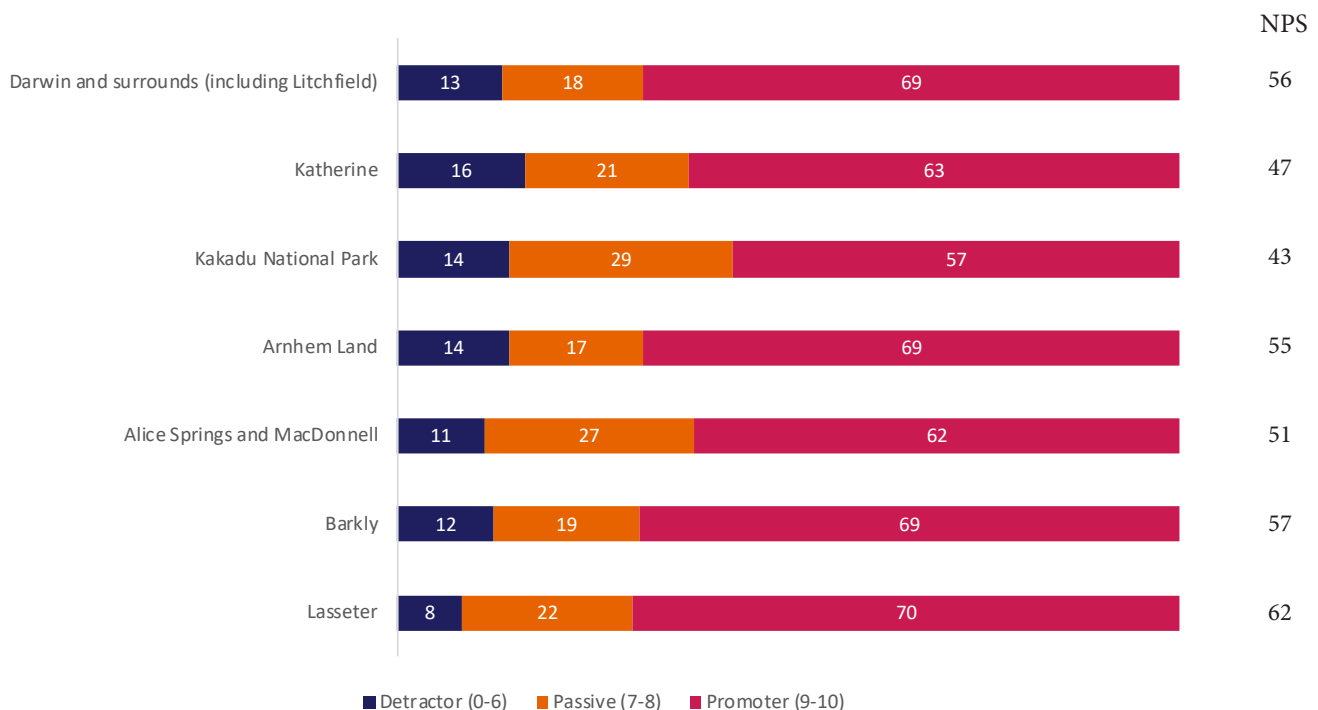


**Over a quarter (27%)
of visitors indicated
that they are likely to
return to the NT in the
next two years**

Q: On a scale of 0 to 10 below, where 0 is definitely not, and 10 is definitely yes, how likely are you to recommend the Northern Territory as a place to holiday?

Base: Total visitors (n=701)

Likelihood to recommend by region



Q: On a scale of 0 to 10 below, where 0 is definitely not, and 10 is definitely yes, how likely are you to recommend the Northern Territory as a place to holiday?
Base: Interviewed at: Alice Springs and MacDonnell region (n=190); Barkly region (n=81); Lasseter region (n=133); Katherine region (n=86); Kakadu region (n=42); Arnhem Land (n=35); Darwin and surrounds including Litchfield (n=134)

Publication date: March 2020