



Australian Government
Department of Resources, Energy and Tourism
Tourism Research Australia



Destination Visitor Survey

Strategic Regional Research – Northern Territory

Dispersing Beyond Darwin

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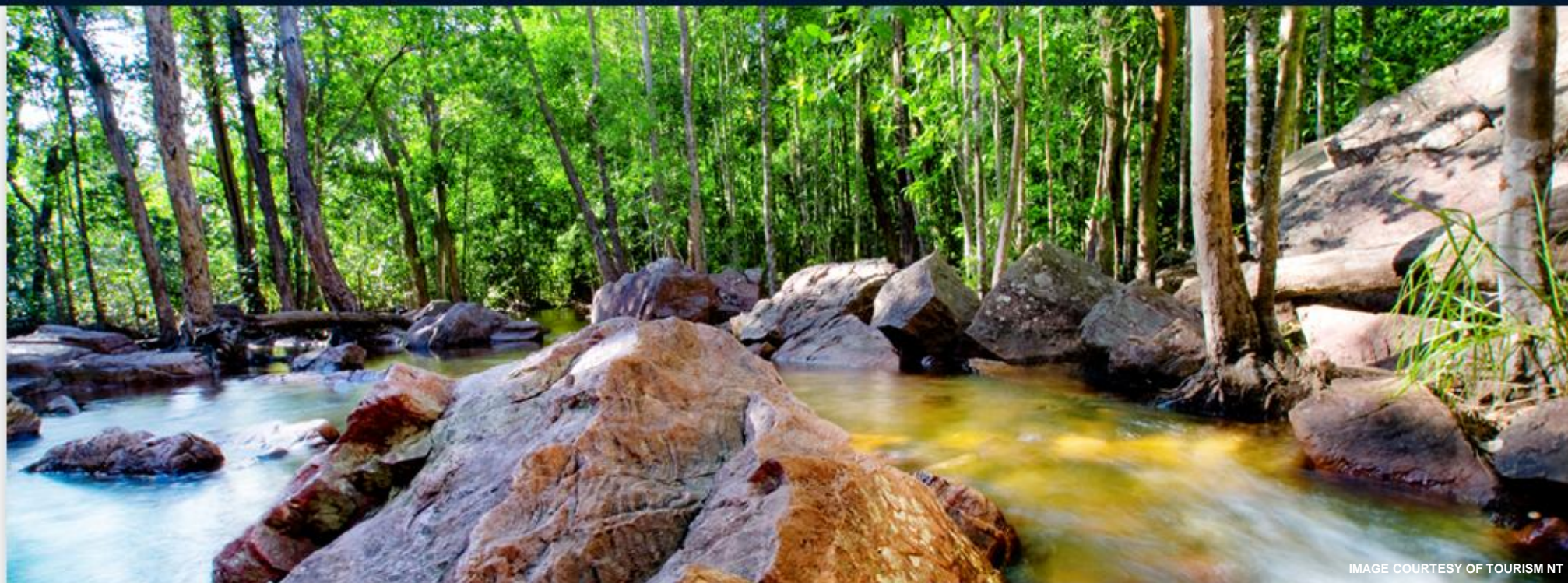
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Beyond Darwin Destination Visitor Survey 2011

Understanding Darwin visitor dispersal



Background and objectives

Crocodile



IMAGE COURTESY OF TOURISM NT

Key research objectives

To provide a greater understanding of the motivations and behaviour of visitors to and around Darwin, in order to feed into strategic recommendations to grow visitor dispersal within the Top End.

1 Market understanding: who is visiting Darwin?

- Profile: who is travelling to Darwin and the Top End?
- Size and nature of the market:
 - Demographics
 - Attitudes

2 What is their travel behaviour in and around Darwin – what role does Darwin play?

- Destination(s) visited in the Top End
- Length of stay
- Role of Darwin
- Transport used
- Trip type – organised vs. independent

3 What are the key influencers on the destination and itinerary decisions?

- Key drivers for destination choice – to and within the region
- Triggers and barriers to dispersal
- Consideration set (see qual slides)
- The decision-making process
- Information needs and sources
- Variations in attitudes and behaviour by segment

4 How are Darwin and the Top End currently perceived by visitors?

- Perceptions of Darwin and the Top End among visitors
- Does the region meet visitor expectations? How does it compare to competitors?
- Triggers and barriers to dispersal
- Openness of those not currently leaving Darwin to travelling more widely within the region

5 What actions should DRET/ Tourism NT take?

- What are the priority actions which should be taken to increase dispersal levels within the region?
- Identification of greatest opportunities

Research approach

Yellow Water Billablong, Kakadu National Park



IMAGE COURTESY OF TOURISM NT



Research approach

WHAT?

- N=302 visitors per 2 waves (n=604 total)
- 15 minute face to face interviews conducted in and around Darwin

WHEN?

- Wave 1 - Shoulder Season - April / May 2011
- Wave 2 - Peak season – August 2011

WHO?

- Travellers visiting to Darwin & The Top End region for leisure who had not just arrived in Darwin & were not there to watch or compete in the Arafura Games (Wave 1)
- Flown in and / or out of Darwin
- Quotas on:
 - Domestic (max n=210) vs. overseas (max n=90) per wave
 - Min n=75 per wave for each trip type of Darwin only, Darwin plus daytrip, Darwin plus overnight to ensure key dispersal types could be analysed

Who did we speak to?

Respondent profile



Total: N=604

Gender

- 42% male; 57% female



Age group

Please of residence	Australia	Overseas
■ 18-34 years	24%	65%
■ 35-54 years	42%	23%
■ 55+ years	34%	11%



Marital status

- Single 31%
- Part of a couple 68%



Children in household

- Yes 30%
- No 70%



Work status

- Full time 55%
- Retiree 22%
- Part time 9%
- Studying 6%
- Not currently Employed 3%
- Mainly doing home duties 4%



Place of residence

NET AUSTRALIA 67%		NET OVERSEAS 31%	
Australia – NSW	24%	New Zealand	19%
Australia - QLD	21%	Germany	13%
Australia - VIC	21%	UK	13%
Australia - WA	12%	US/ Canada	16%
Australia - SA	12%	France	6%
Australia - TAS	7%	Other Europe	6%
Australia - ACT	3%	Asia & Other Int	26%



Travel party

- Alone 21%
- Partner 53%
- Immediate family 11%
- Friends or relatives 15%
- Group or club 1%



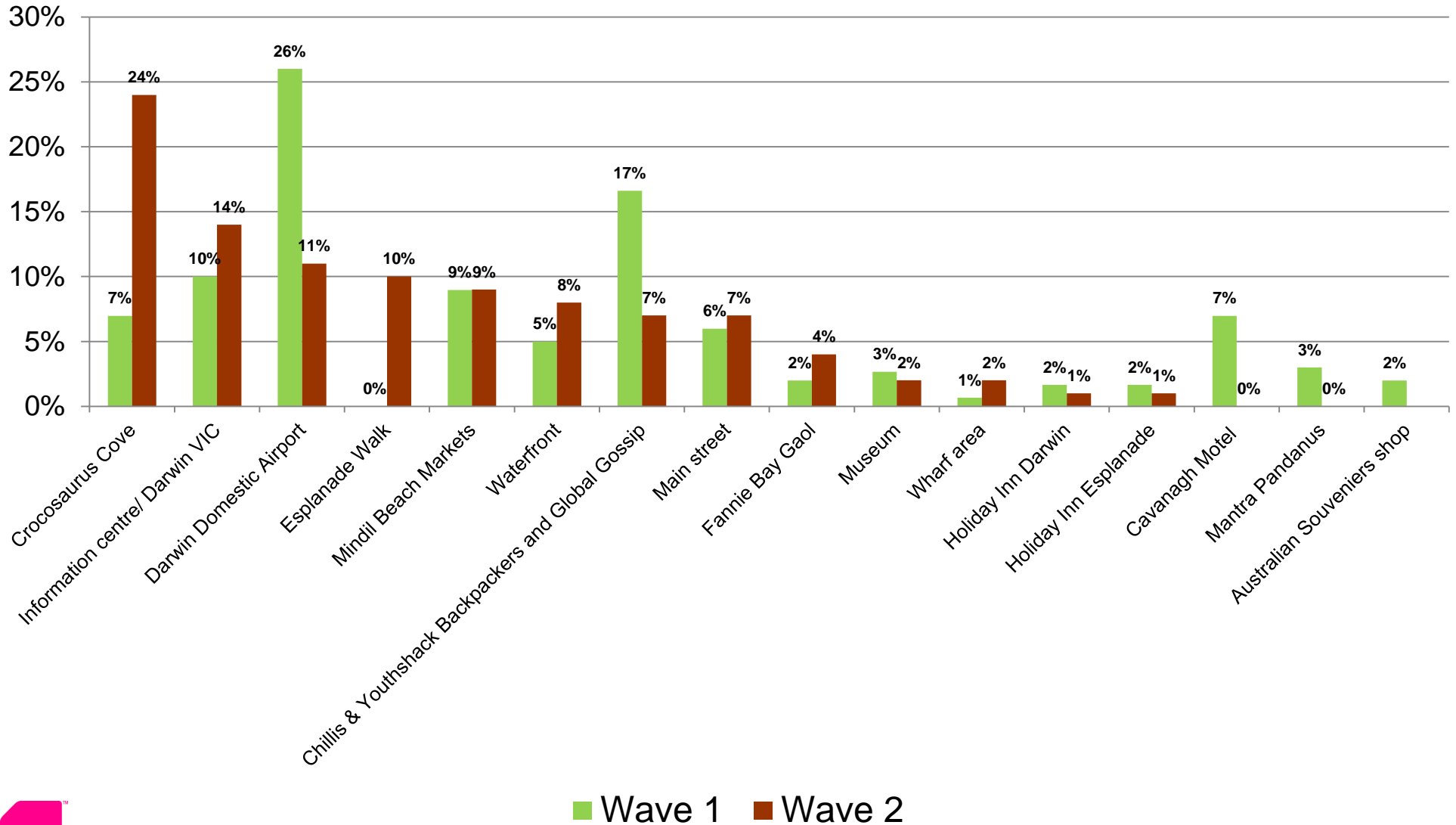
Total annual household income before tax

- Up to \$65,000 29%
- \$65,001 to up to \$120,000 24%
- \$120,001 to more than \$160,000 5%
- Not stated 41%

Other

- Experiential Traveller 60%
- Non Experiential Traveller 40%

Where did we interview?



■ Wave 1 ■ Wave 2

We also conducted 6 in-depth interviews with recent first time visitors

Darwin Only N=1

Glenda - female, 65+ years,
travelling with partner
- 4 day trip
- attraction information from
hotel

Day Tripper N=4

Zoe - female, 25-34 years, VFR
- independent trip to Litchfield
- 5 day trip
- visited Tourist Information Centre

Julie - female, 55-64 yrs, travelling
with partner
- independent trip to Litchfield
- organised trip to Kakadu
- 10-11 days
- pamphlets from motel

Belinda - female, 55-64 yrs, travelling with
partner
- 3 organised trips: Kakadu,
Litchfield, Katherine Gorge
- 10 days

Graham - male, 65+ yrs, travelling with
partner
- 3 organised trips: Kakadu,
Litchfield, Katherine Gorge
- 9 nights

Overnighter N=1

Jane - female, 55-64 years, travelling
with partner
- organised trip combining
Kakadu & Litchfield
- 10-11 days

Key findings

Insight 1

Relatively even distribution between visitors visiting Darwin only, taking day trips within the region, and overnight visits. There was little variation between shoulder and peak.

Little variation between first time and repeat visitors, although qualitative research found that some planned to return and travel more widely in the region on a subsequent visit.

Insight 2

Domestic travellers dominated those visiting Darwin only, with VFR a primary motivation for two-fifths of these visitors – local residents should be seen as local ambassadors for Darwin & the Top End.

Those travelling further afield in the region tended to be older and / or do not have children

Insight 3

Kakadu and Litchfield National Parks were the primary drawcards outside Darwin, with Litchfield most likely to be visited in a day trip, while Kakadu was often explored via an overnight visit.

Qualitative findings showed many day trip visitors found the distances involved to get to Kakadu are be greater than expected – must communicate benefits of overnight.

Key findings (2)

Insight 4

Around two-fifths of visitors hired a vehicle during their trip. Bus/ coach tours were particularly likely to be used to access Kakadu, especially in peak season.

Insight 5

The majority (over eight out of ten) booked accommodation prior to arrival, however few booked tours in advance – opportunity to further influence earlier in the decision-making process to increase dispersal.

Alongside word of mouth, websites and travel agents are the key information sources used at this stage, with the qualitative element indicating that hotel staff/ leaflets in the lobby were primary influencers once in-destination.

Insight 6

The time available for their trip was felt to be a key barrier to dispersing beyond Darwin among those who did not, with the fact that they came to see friends/ relatives also a factor for many.

Locals who host visitors should be considered a key stakeholder group

Key findings (3)

Insight 7

Barriers to taking overnight trips included having already pre-booked accommodation in advance (particularly an issue in peak season), alongside a feeling among some that they did not represent as good value (particularly in shoulder season). Others took day trips based upon recommendations.

Insight 8

Seeing wildlife (specifically crocodiles) and landscapes were key motivators for travelling further afield in the Top End, alongside the opportunity to swim in water holes (in peak season). Recommendations also played a key role.

The Top End was more likely to be seen as a destination for a longer trip than Darwin.

Insight 9

There are positive perceptions of Darwin among visitors, seen as a destination to ‘relax and recharge’, and as a short break destination (particularly in the shoulder season).

Perceptions of Darwin were relatively consistent among visitor types (while Top End associations are much stronger among those dispersing).

Key findings (4)

Insight 10

Darwin was rated highly for offering a range of things to see and do, as well as for the friendliness of locals.

Value for money was an area rated less strongly. Recommendation levels were high, and over a quarter said that they would be likely to re-visit within 3 years.

Insight 11

Peak season visitors were most likely to recommend and re-visit, with those visiting Darwin only most likely to travel beyond Darwin on a return trip.

Market understanding

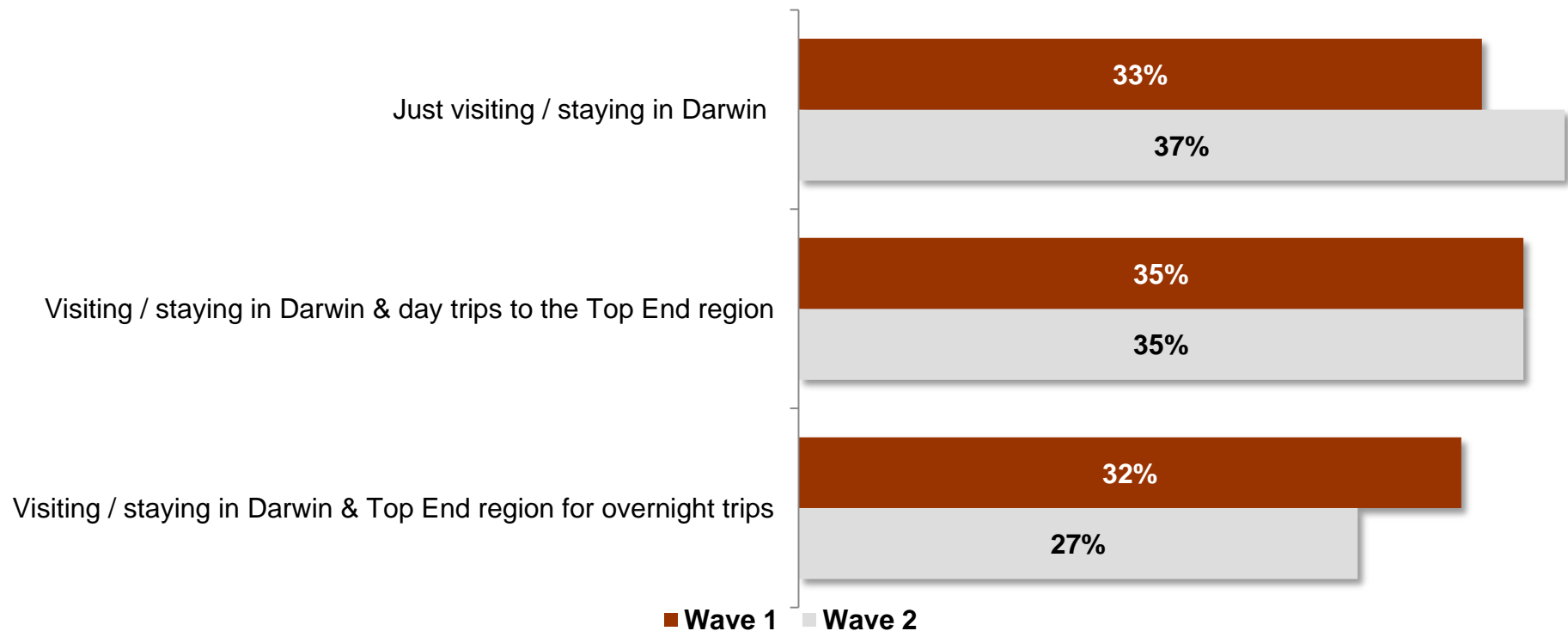
Kakadu National Park



IMAGE COURTESY OF TOURISM NT

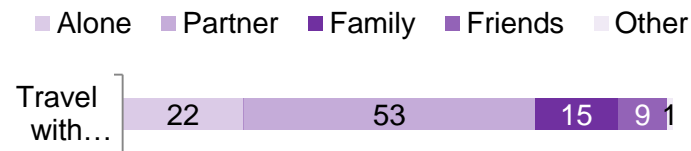
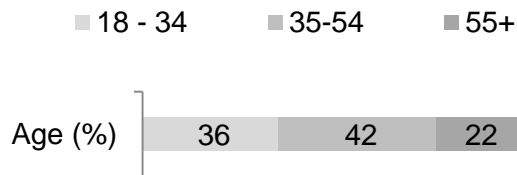


Despite minimum quotas in place, results would suggest that the fall out was quite natural with visits fairly evenly spread between staying in Darwin, going on day trips beyond Darwin and going on overnight trips beyond Darwin

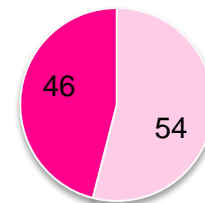


Profile – Non Dispersers

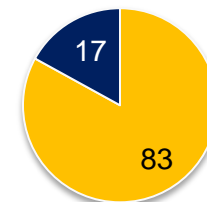
Domestic travellers dominated those staying in Darwin only and not dispersing elsewhere in the Top End, with VFR representing two-fifths



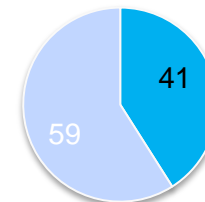
Male Female



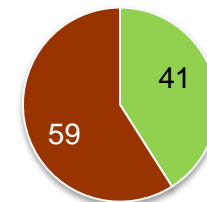
Australia Overseas



Children No children

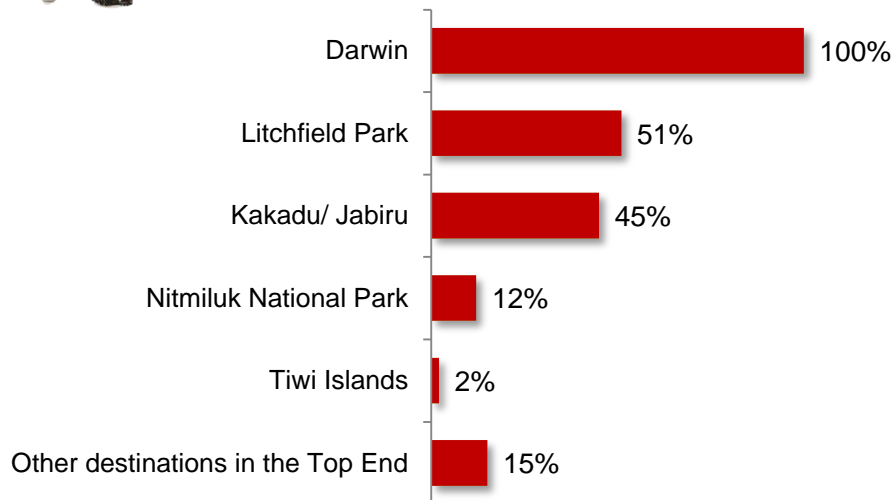
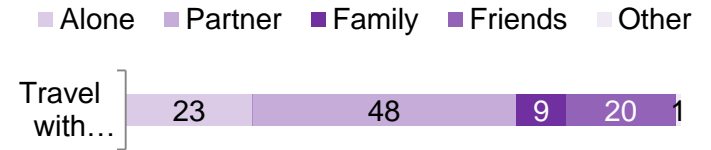
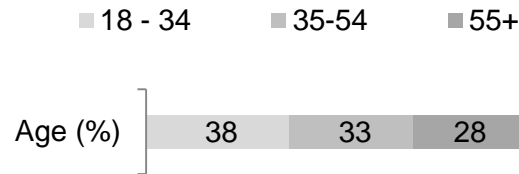


VFR Non-VFR

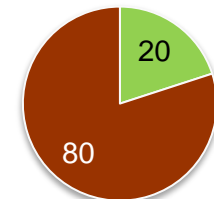
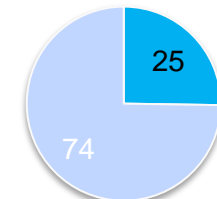
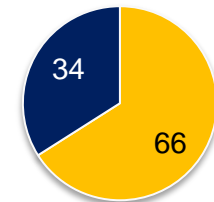
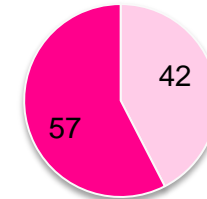


Profile – Day trippers

Litchfield Park and Kakadu were the primary destinations for day trips



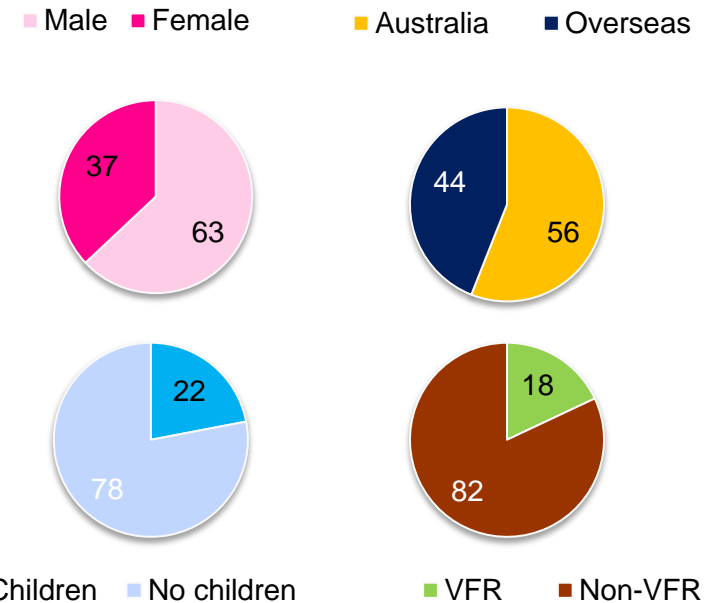
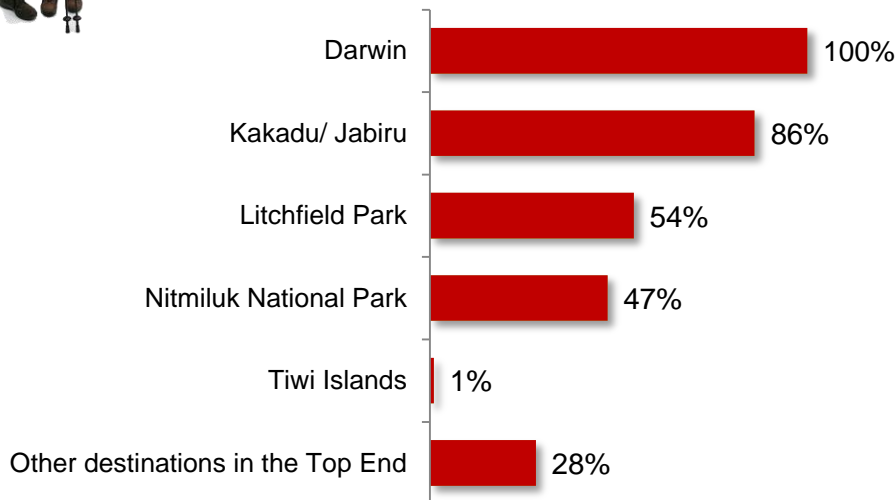
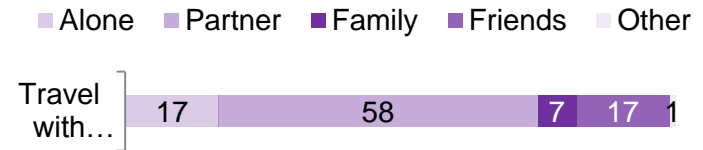
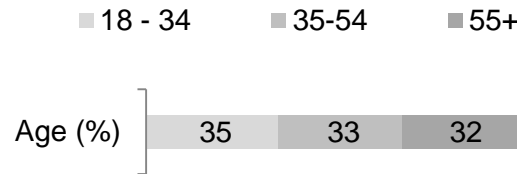
Gender: Male (pink), Female (magenta)
Origin: Australia (yellow), Overseas (dark blue)



Children: Children (blue), No children (light blue)
VFR: VFR (green), Non-VFR (brown)

Profile - Overnigheters

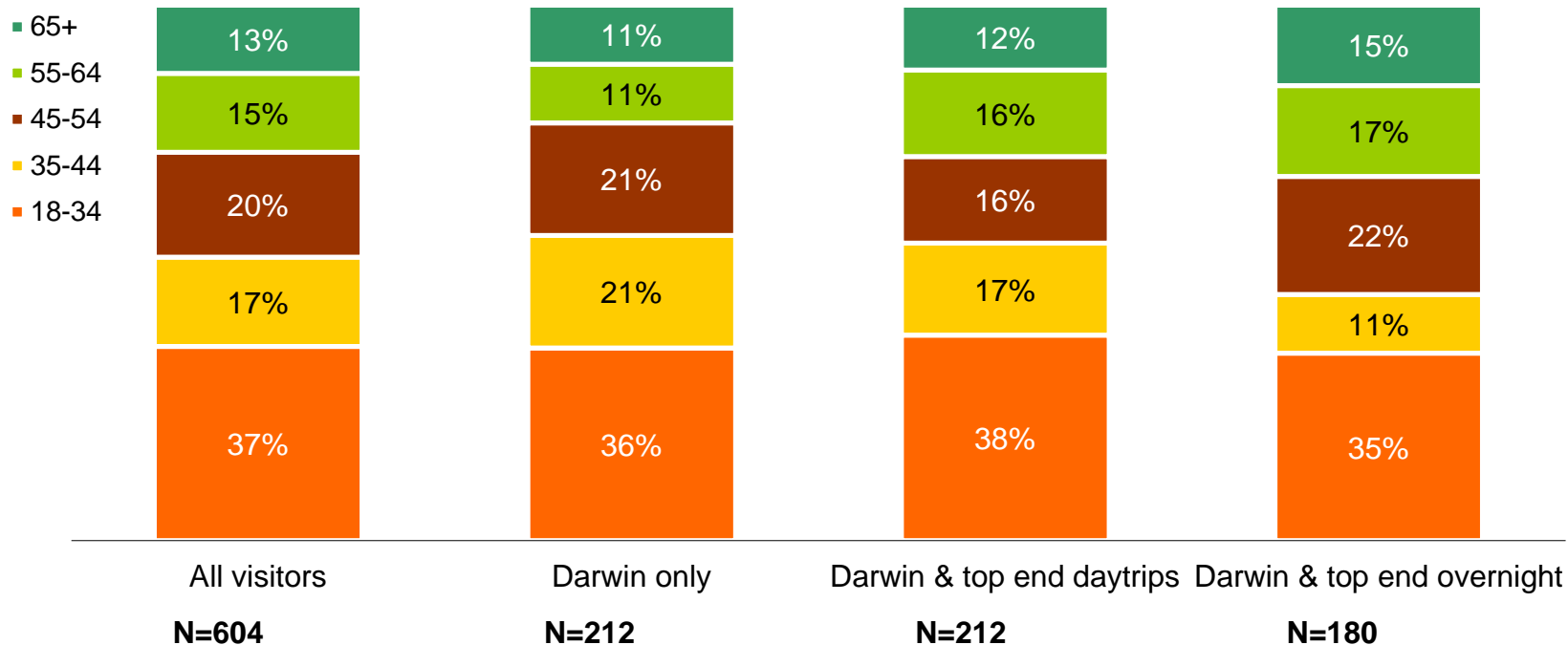
Those travelling more widely in the region were more likely to be overseas visitors



Market profiles (Total)

A spread of ages were visiting Darwin, with almost 40% aged 18 to 34. There were some variations in the age profiles by visitor segment, with a higher % of older visitors, and fewer 35-54s, tending to leave Darwin.

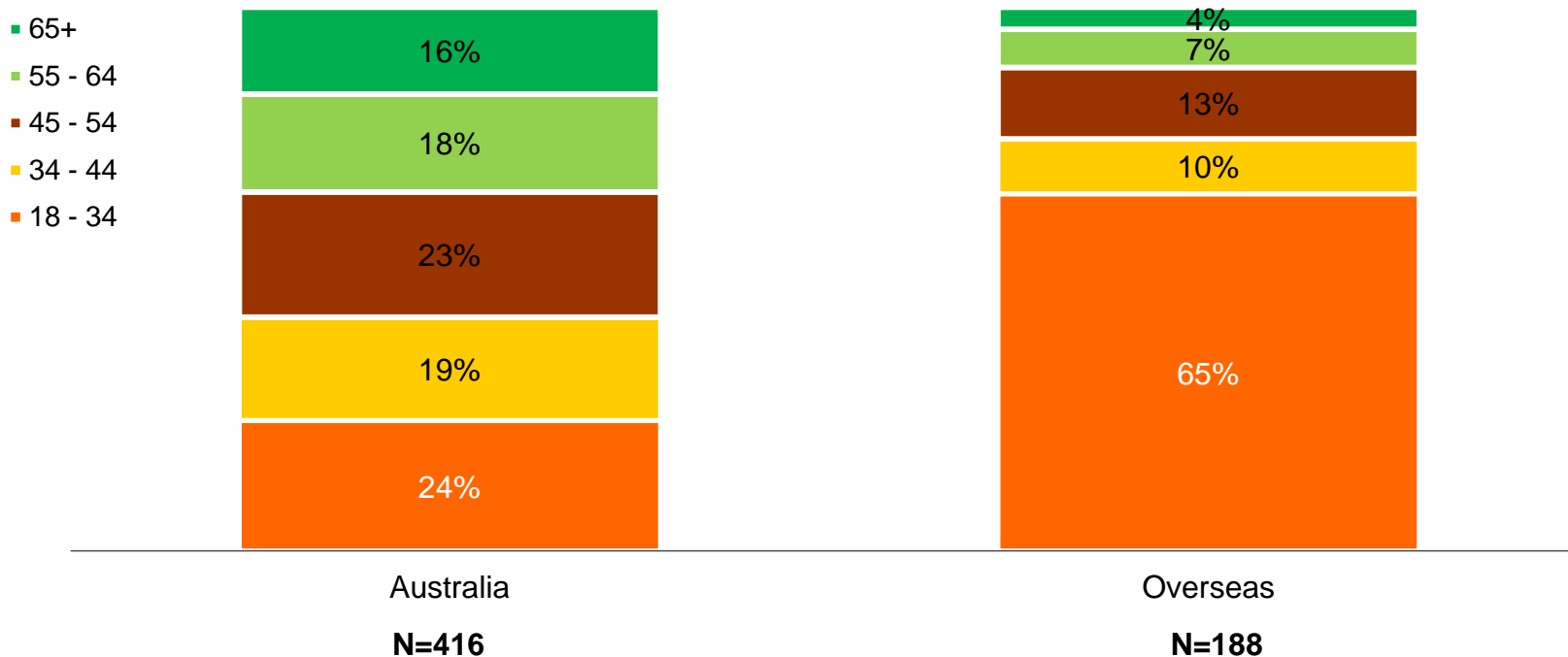
Age profile of visitors by travel behaviour



Market profiles (Domestic vs. Overseas)

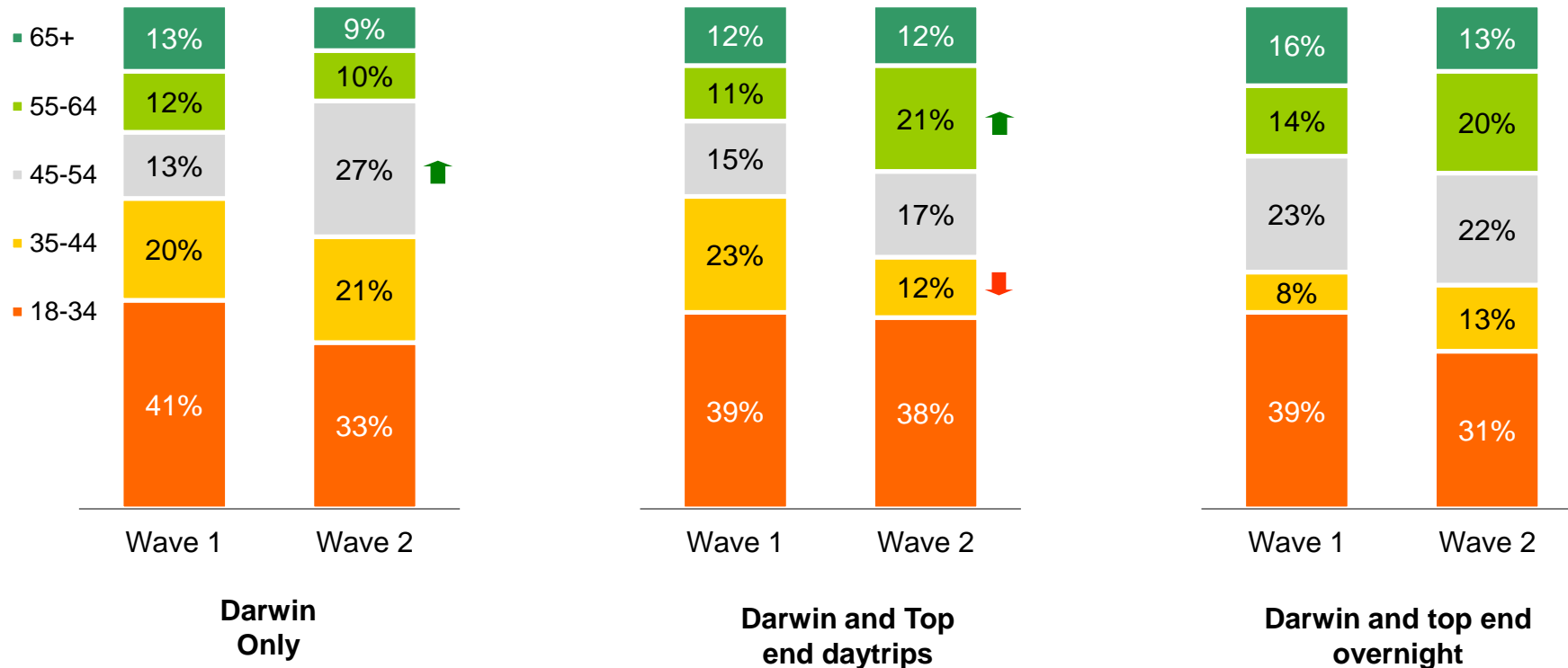
Overseas visitors were younger than domestic visitors, with almost one third aged 18-34



Age profile of visitors by travel behaviour



Market profiles (Wave 1 Shoulder vs. Wave 2 Peak)

Generally a slightly older visitor profile in the Peak season

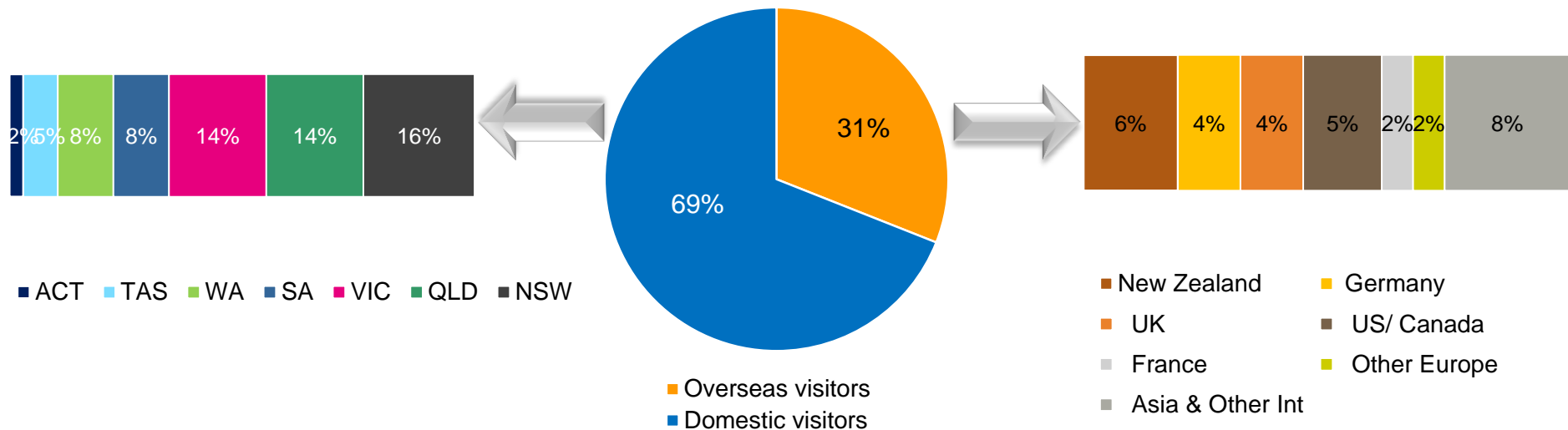


 Significantly higher against previous wave
 Significantly lower against previous wave

Source: S2. How did you travel to Darwin & how do you plan to leave? B1c. Which of the following age groups do you fit into?
 Base: All respondents n=302 per wave

Origin of the visitor base (Total)

Over two thirds of those we spoke to were domestic visitors. New Zealand was the largest source market for international visitors



Travel behaviour

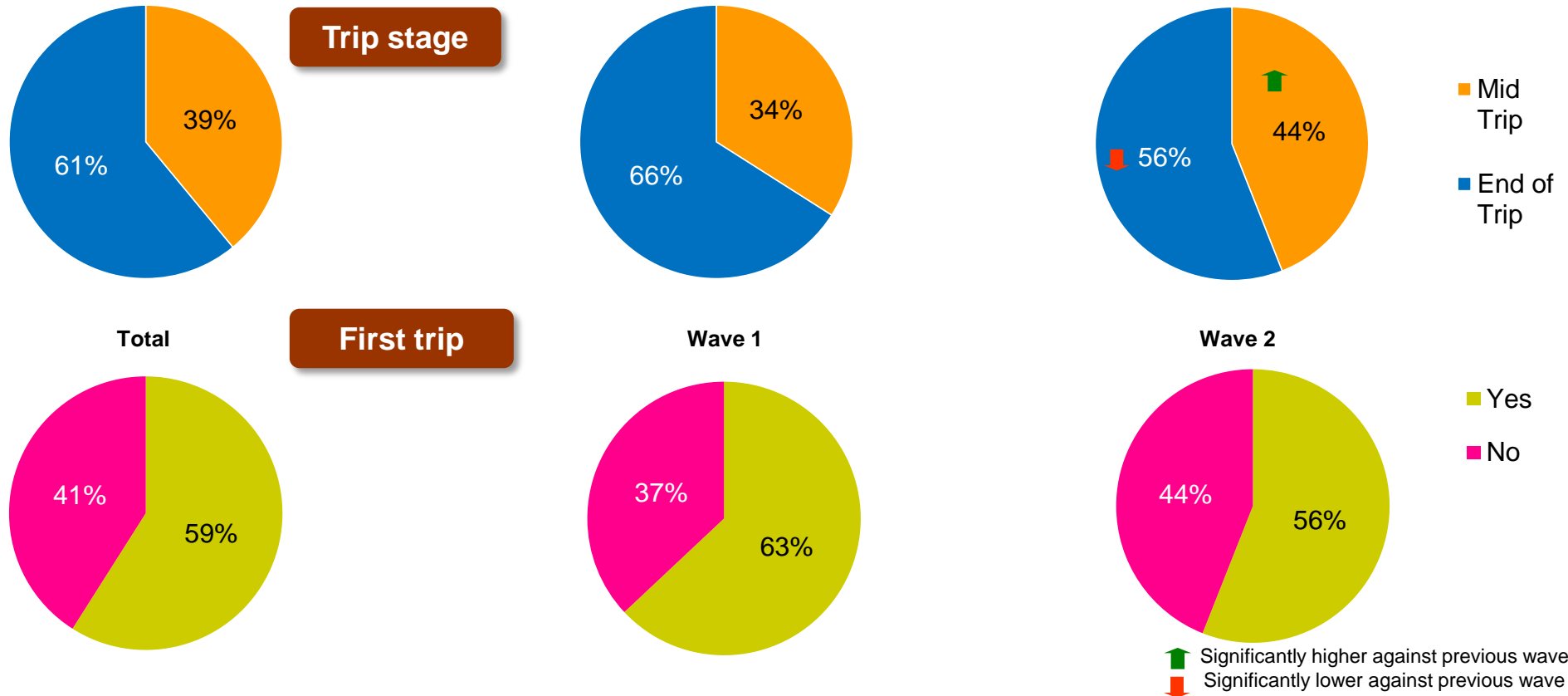
Traditional Indigenous Dance, Darwin Festival



IMAGE COURTESY OF TOURISM NT

Trip details

Over 60% of the visitors we spoke to were towards the end of their trip. For the majority it was their first visit to the region. More nights were spent in Darwin vs. elsewhere in the Top End, reflecting its hub positioning. Qualitative interviews found that higher awareness of the types of tours available and distances involved in them would potentially trigger greater dispersal.



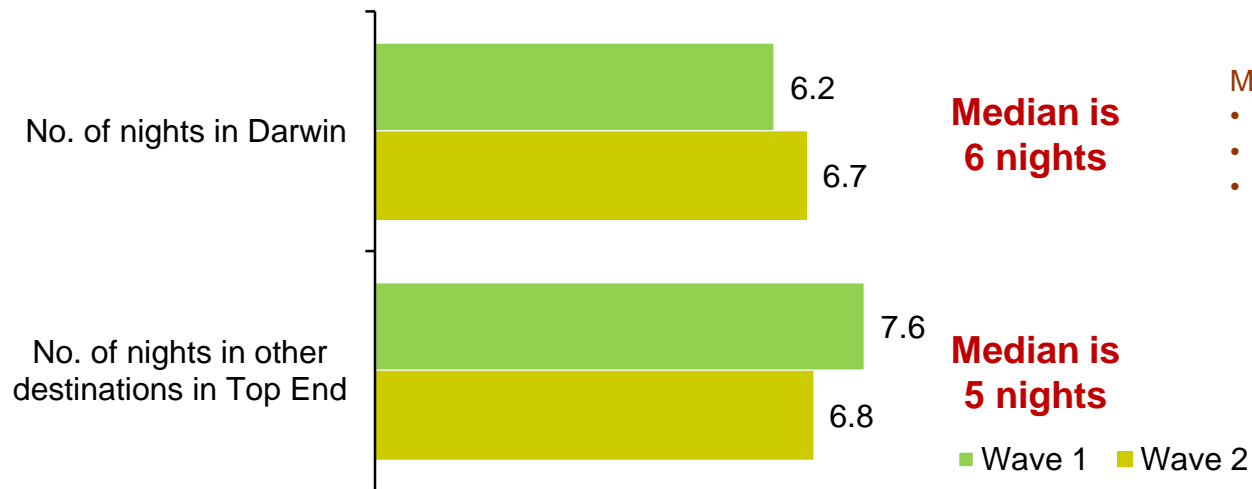
Source: S4: Which of the following statements best describes at what stage you are at in your trip in the Darwin region. In the middle of my Darwin/ Top End trip (ie have spent some time in/around Darwin) / Towards the end of my Darwin/ Top End trip
 Q3. Was this the first time you had visited the Darwin / Top End region, including both day trips and overnight trips?

Base: n=302 per wave

Trip details

More nights were spent in Darwin vs. elsewhere in the Top End, driven by Darwin's position as the gateway / hub to the Top End region, and the fact that many visitors were not travelling beyond the city. Those taking day trips spent longest in Darwin.

Mean no. of nights



- Mean nights in Darwin. Those visiting:
- Darwin only – mean = 5.9 nights
 - Darwin + day trips – mean = 7.1 nights
 - Darwin + o/night trips – mean = 6.3 nights

Q4a. How many nights have you / will you stay in Darwin during this trip?

Q5b. How many nights have you / will you stay in other destinations in the Top End during this trip excluding Darwin itself?

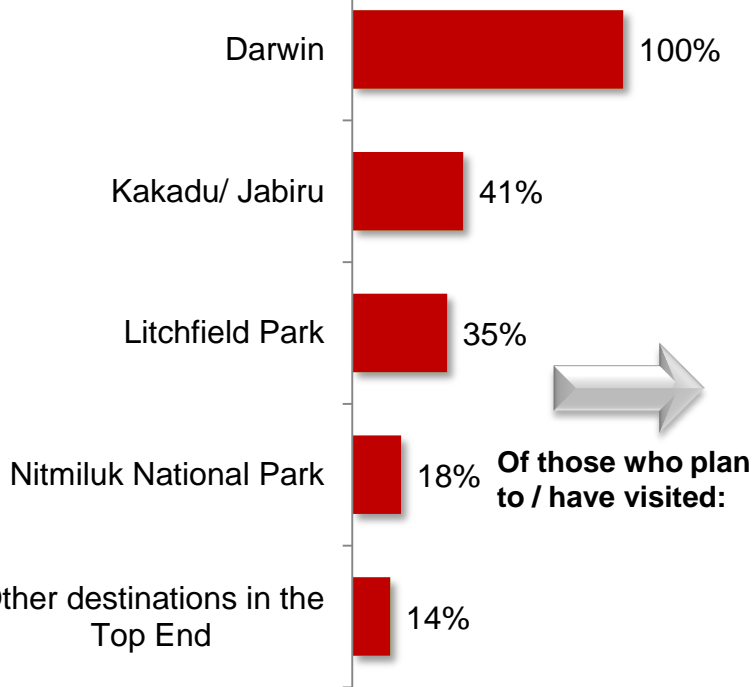
Base: All respondents n=302, Those respondents planning to visit regions outside of Darwin & stay overnight n=90* wave 1 / n=82* wave 2

*Means exclude outliers (eg. over 21 nights for Darwin, over 28 nights for other destinations)

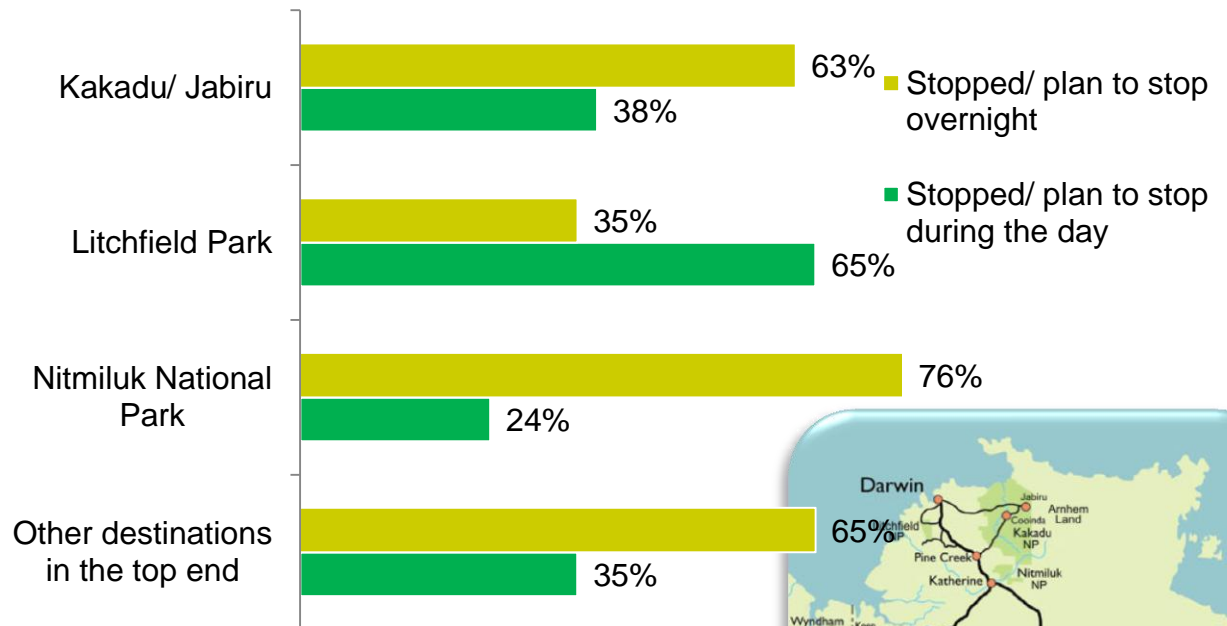
Destinations visited or plan to visit (Total)

Kakadu/ Jabiru and / or Litchfield Park are the key destinations outside Darwin visited, with some visitation of other destinations. Litchfield tended to be a day trip destination whilst others often involved an overnight trip

Destinations Visited



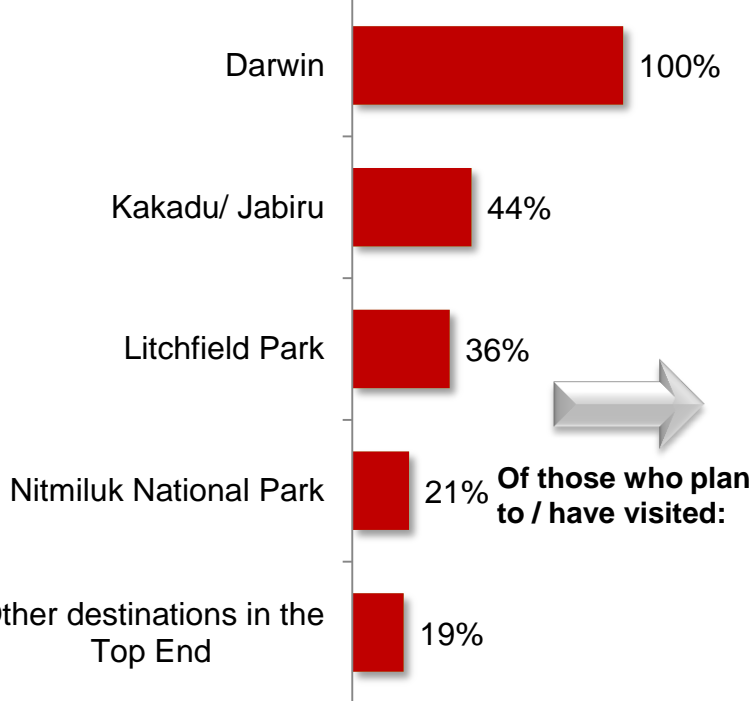
Day vs. overnight trips split by destination



Destinations visited or plan to visit (Shoulder season)

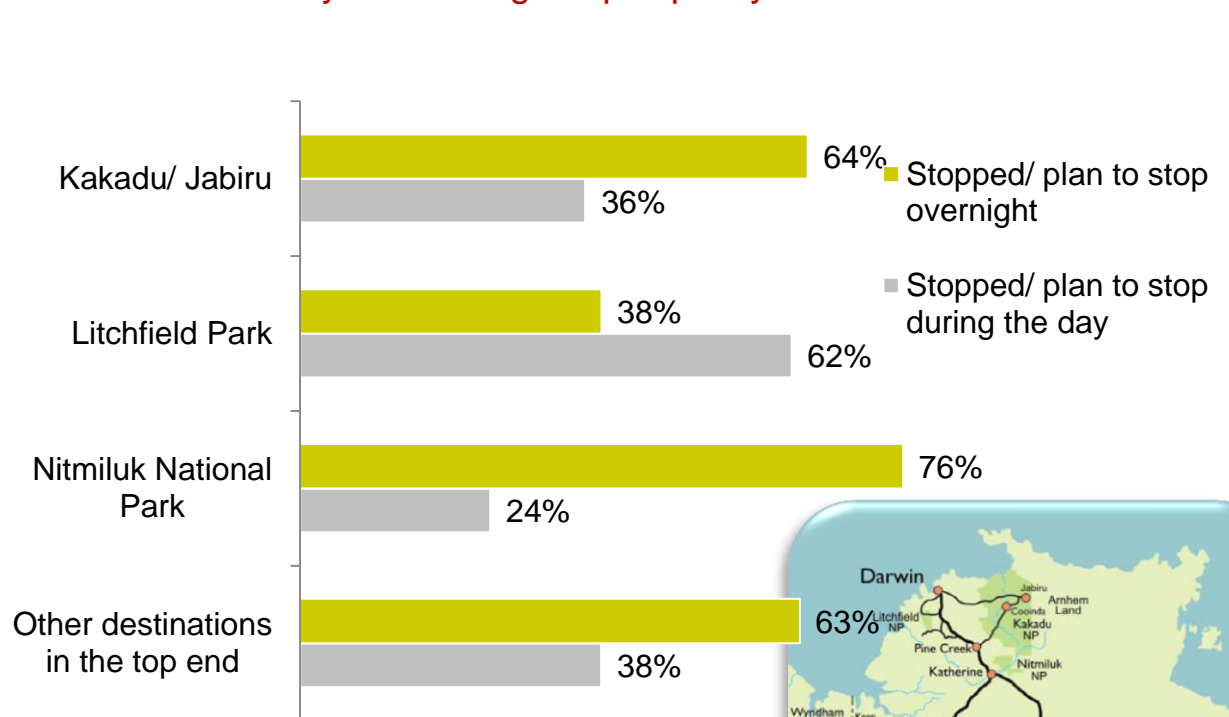
Kakadu/ Jabiru and / or Litchfield Park are the key destinations outside Darwin visited, with some visitation of other destinations. Litchfield tends to be a day trip destination whilst others often involve an overnight trip

Destinations Visited



Of those who plan to / have visited:

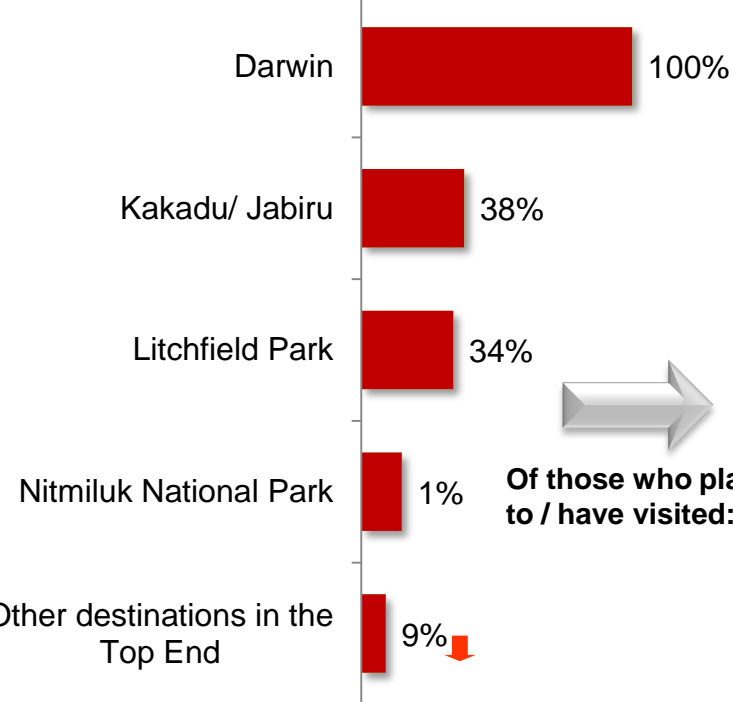
Day vs. overnight trips split by destination



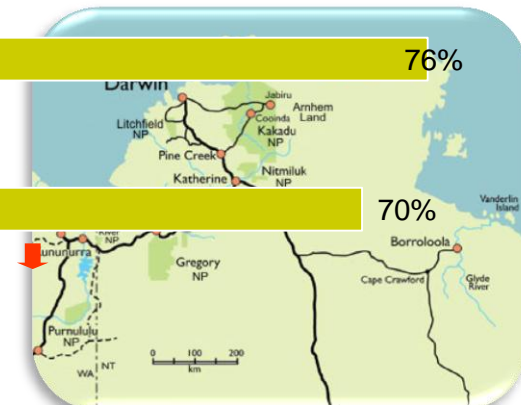
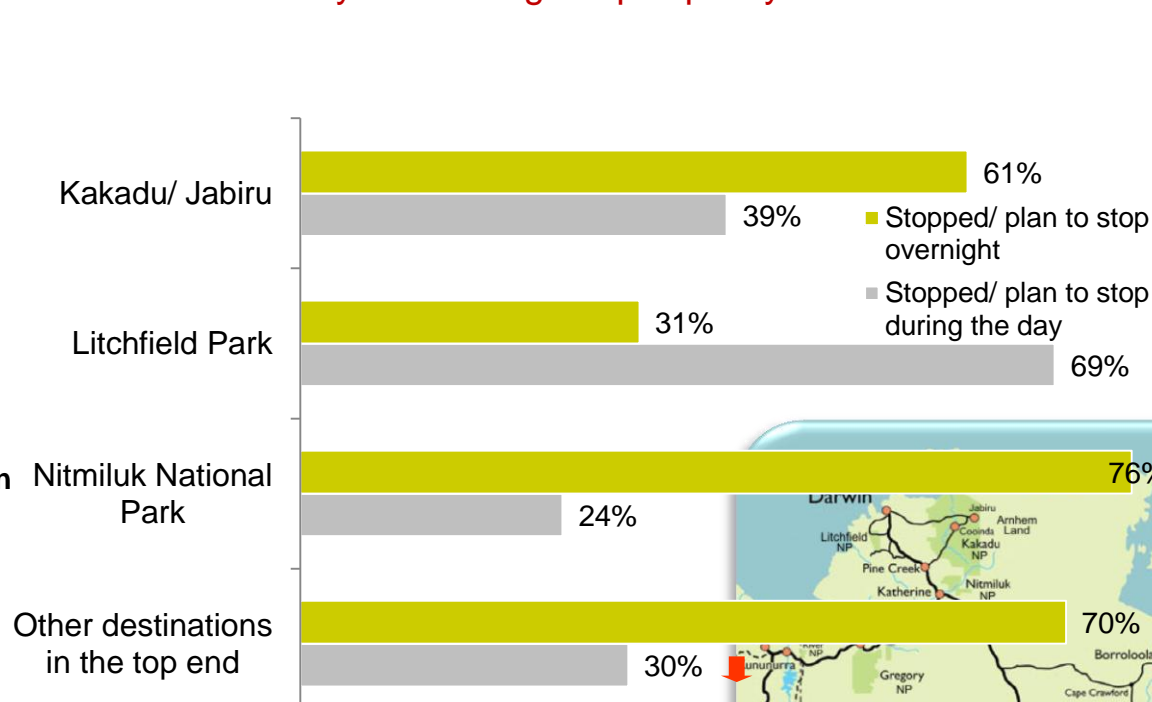
Destinations visited or plan to visit (Peak season)

Slightly higher visitation of Kakadu/ Jabiru, however lower of Nitmiluk. Similar split between day/ overnight trips by destination.

Destinations Visited



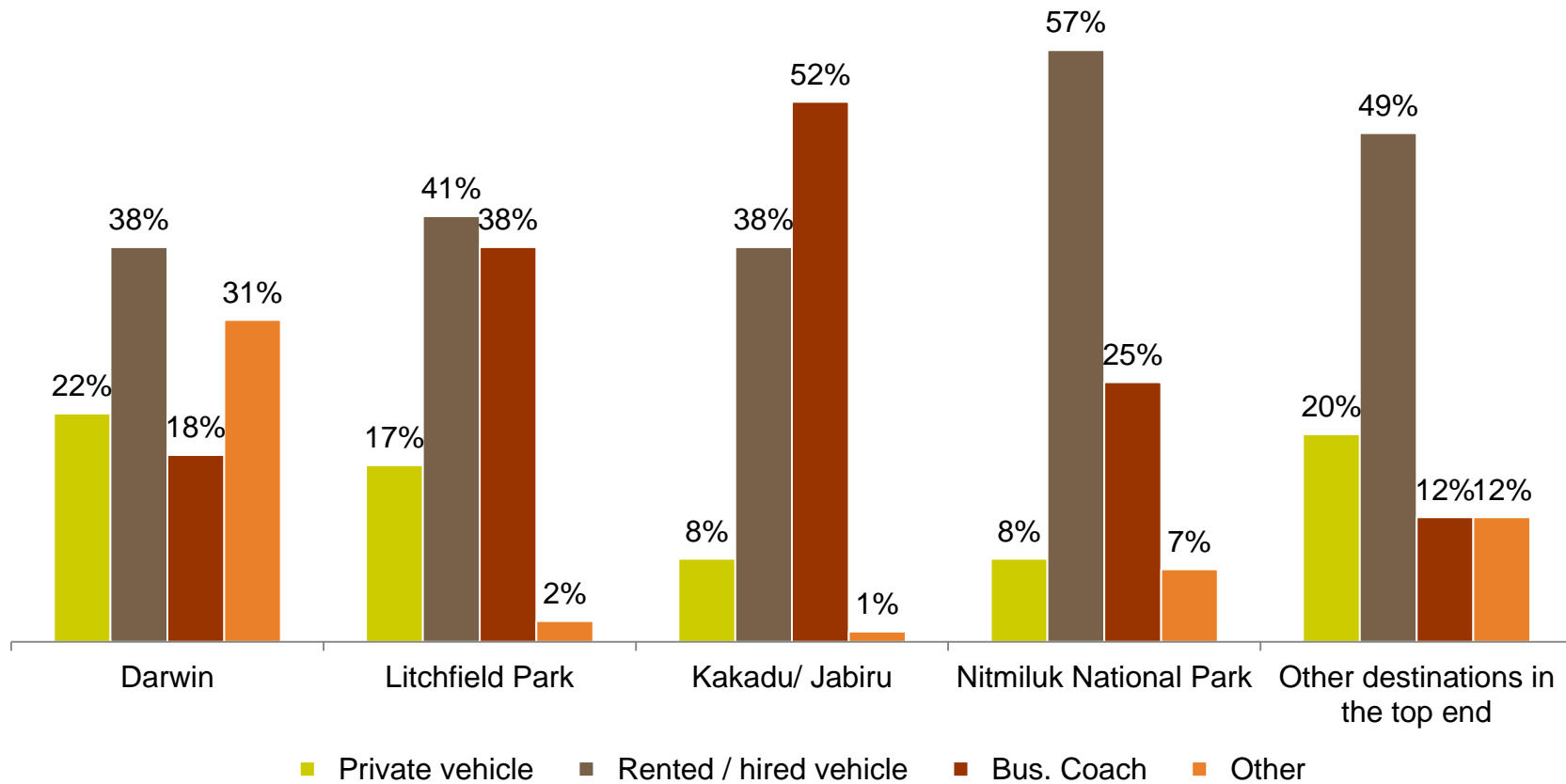
Day vs. overnight trips split by destination



↑ Significantly higher result compared to previous wave (95% confidence)
↓ Significant lower result compared to previous wave (95% confidence)

Mode of transport for destinations visited (Total)

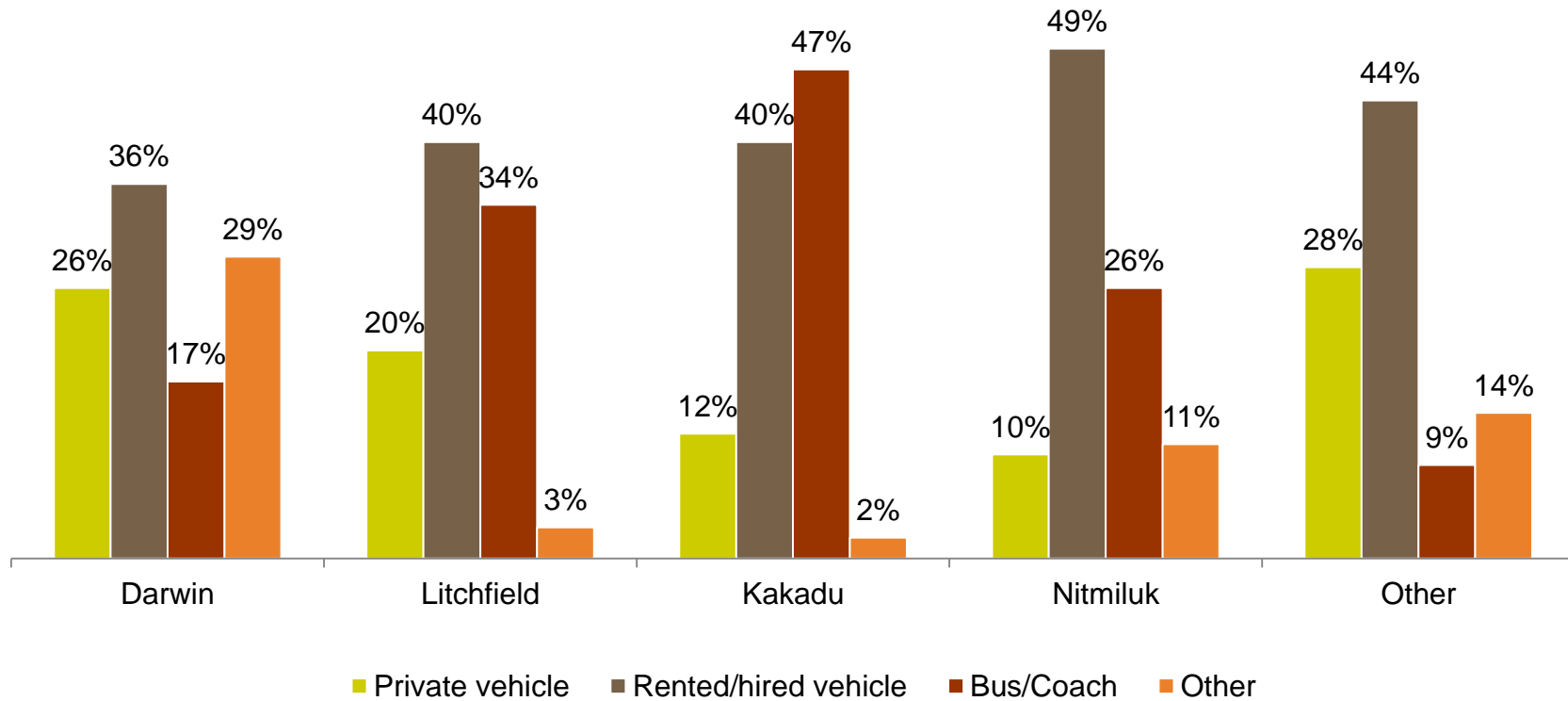
Around two-fifths of visitors hire a vehicle, although bus / coach trips are popular for accessing Kakadu



Source: Q14a. And what is or will be the main form of transport used to travel to these destinations?
 Base: All respondents who visited destinations within the Top End region, Darwin n=597,
 Litchfield Park n=212, Kakadu/ Jabiru n=248, Nitmiluk National Park n=107, Other destinations n=83

Mode of transport for destinations visited (Domestic)

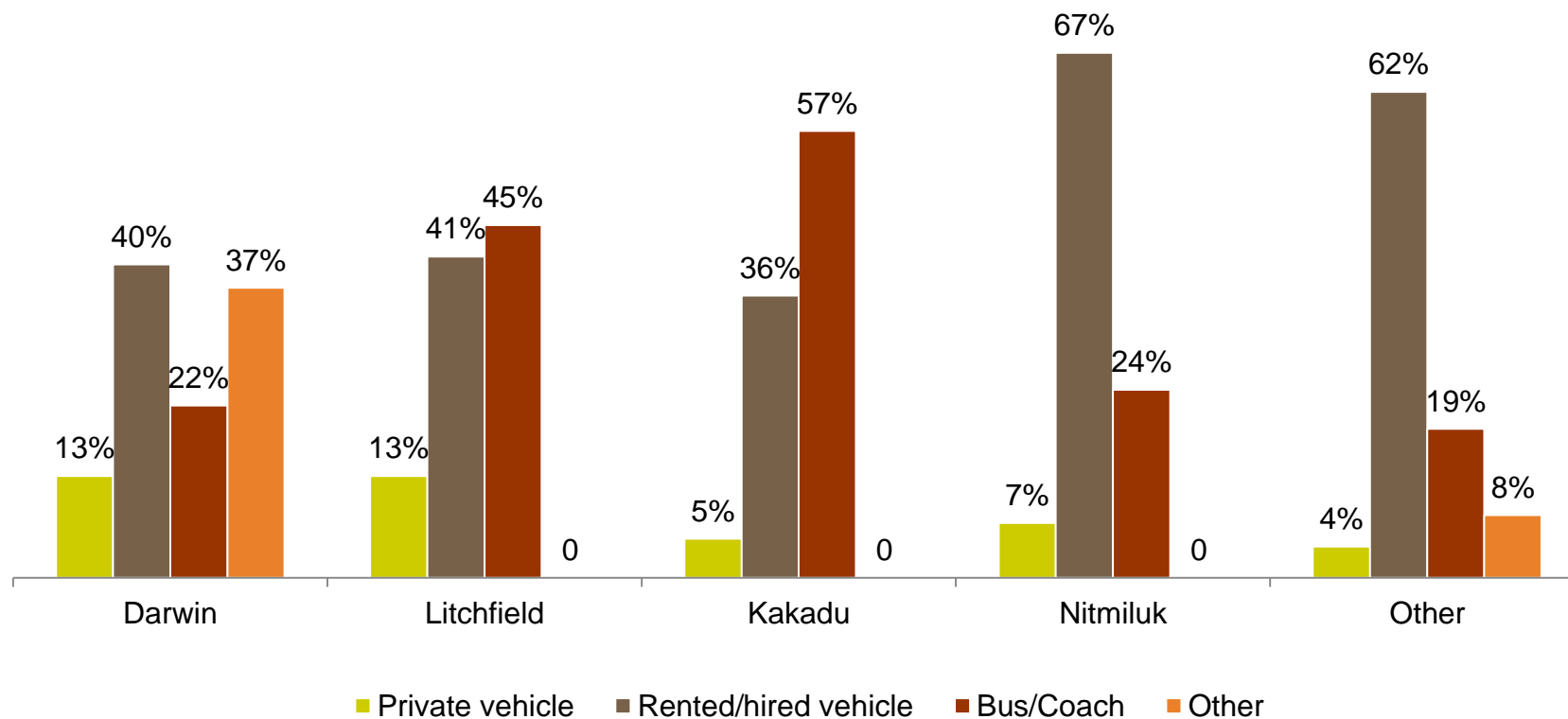
Domestic visitors are more likely to use a private car for Darwin / Litchfield than other visitors



Source: Q14a. And what is or will be the main form of transport used to travel to these destinations?
 Base: All respondents who visited destinations within the Top End region, Darwin n=597,
 Litchfield Park n=212, Kakadu/ Jabiru n=248, Nitmiluk National Park n=107, Other destinations n=83

Mode of transport for destinations visited (Overseas)

Overseas visitors are more likely to use a rented car to go further afield to Nitmiluk than other visitors. They are also more likely to travel to Kakadu on a bus / coach

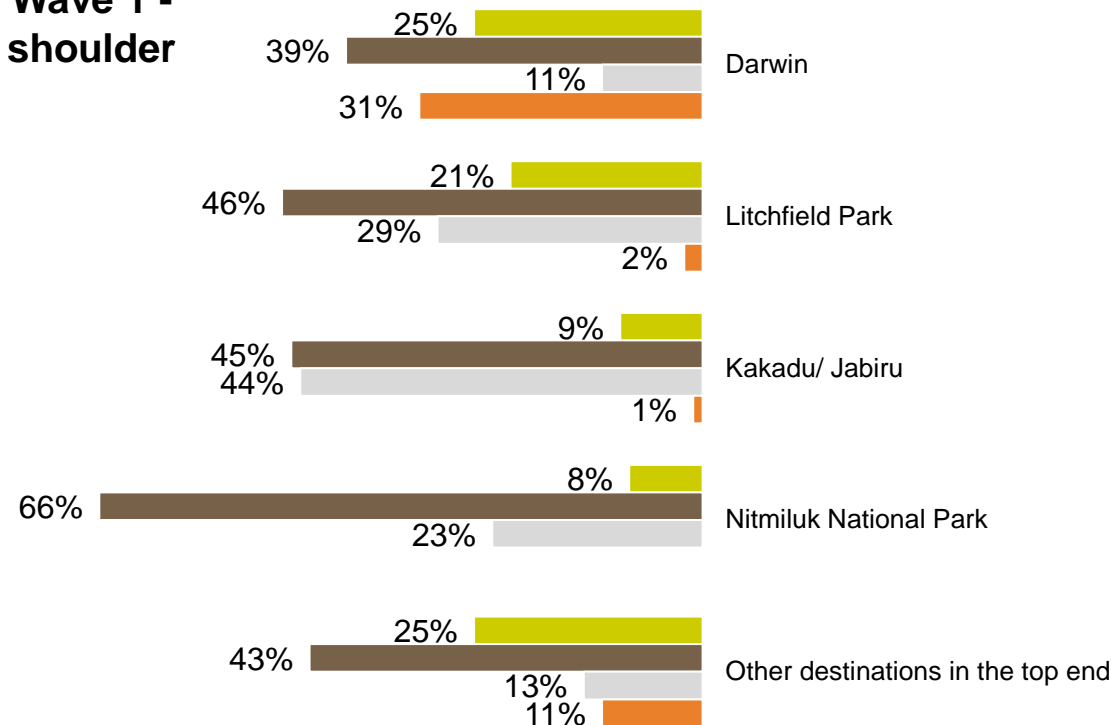


Source: Q14a. And what is or will be the main form of transport used to travel to these destinations?
 Base: All respondents who visited destinations within the Top End region, Darwin n=597,
 Litchfield Park n=212, Kakadu/ Jabiru n=248, Nitmiluk National Park n=107, Other destinations n=83

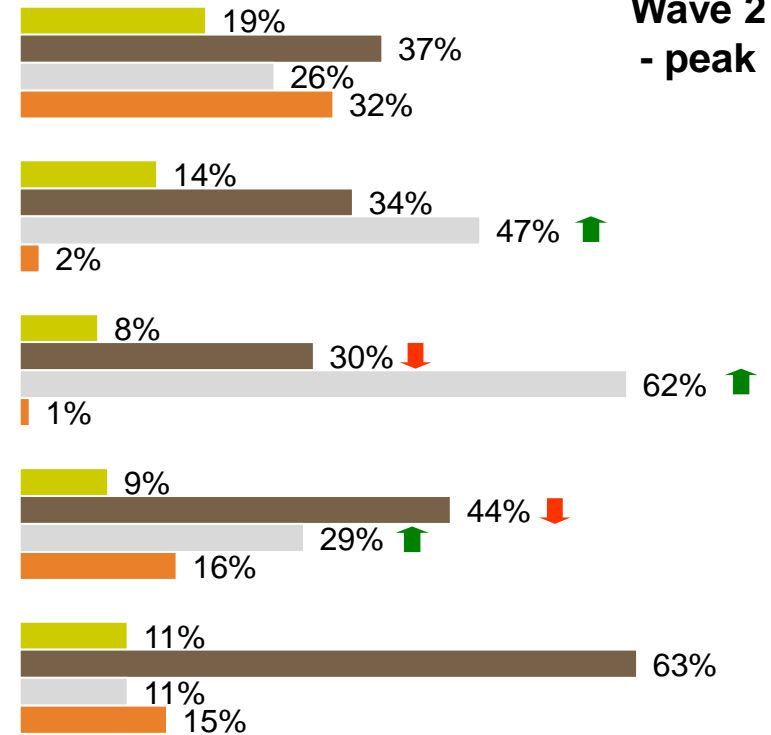
Mode of transport for destinations visited (Shoulder vs Peak)

Whilst renting / hiring a vehicle was a popular form of transport in both peak & shoulder season, Kakadu & Litchfield were significantly more likely to be accessed by bus / coach in peak season

Wave 1 - shoulder



Wave 2 - peak



↑ Significantly higher against previous wave
↓ Significantly lower against previous wave
■ Private vehicle ■ Rented / hired vehicle ■ Bus. Coach ■ Other

Source: Q14a. And what is or will be the main form of transport used to travel to these destinations?
 Base: All respondents who visited destinations within the Top End region, Darwin n=296, Litchfield Park n=110, Kakadu/ Jabiru n=133, Nitmiluk National Park n=62, Other destinations n=56

Key influencers

Darwin sunset



IMAGE COURTESY OF TOURISM NT



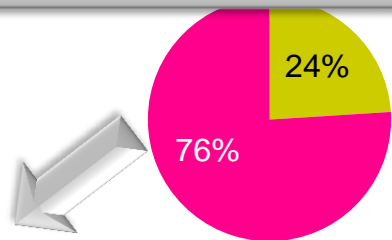
Australian Government
Department of Resources, Energy and Tourism
Tourism Research Australia



Planning for visit to Darwin

Over three quarters of visitors plan their trip prior to arrival, with accommodation most likely to be booked in advance – this could be a barrier to taking overnight trips beyond Darwin.

Opportunity to increase pre-booking of excursion items and national park tickets. Websites and travel agents are key channels of influence.

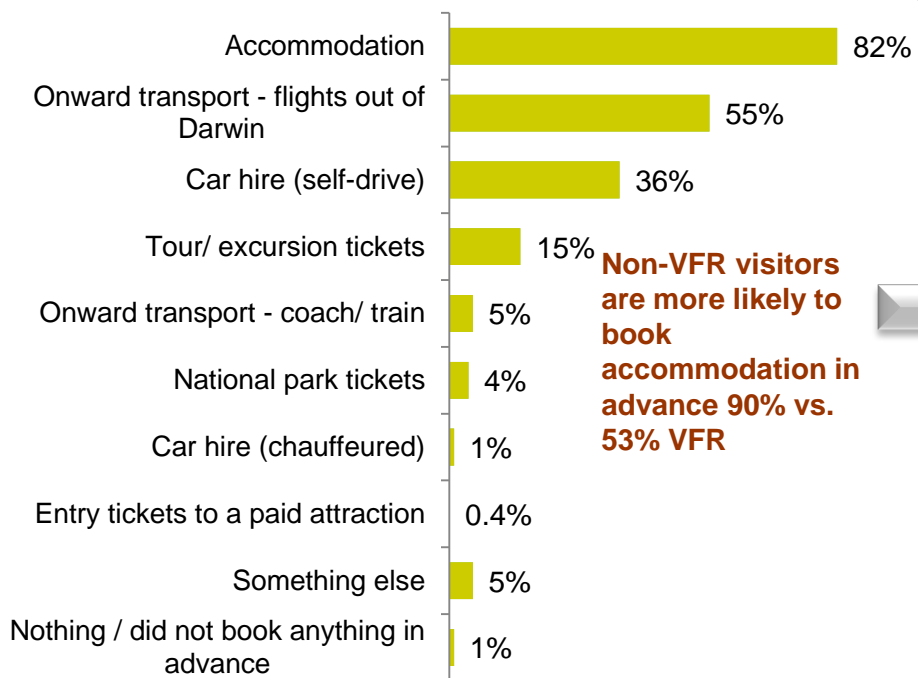


Planned trip

- No
- Yes

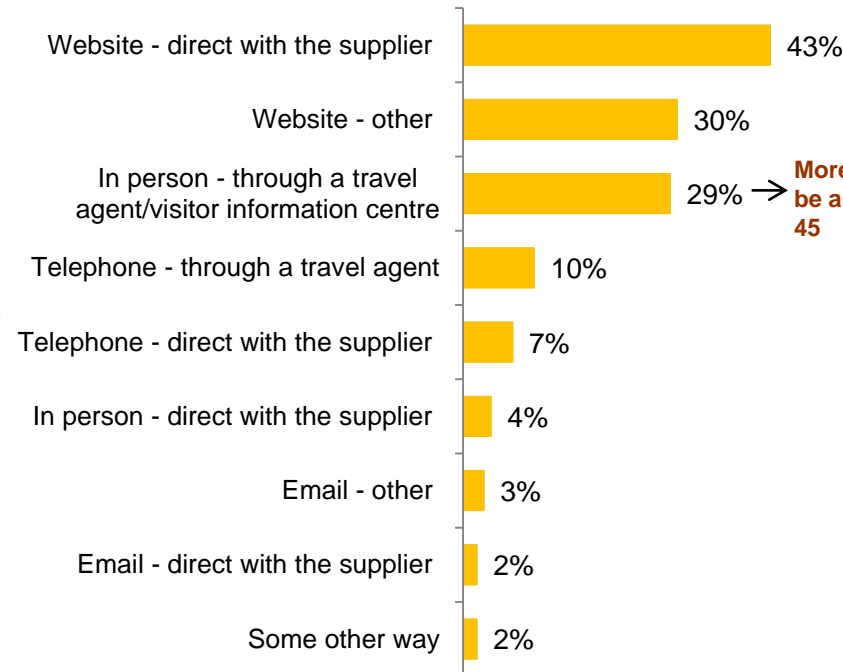
Those dispersing are more likely to book items in advance (82% vs. 65% of those staying in Darwin)

Items booked in advance



Non-VFR visitors are more likely to book accommodation in advance 90% vs. 53% VFR

Mode of booking



More likely to be aged over 45

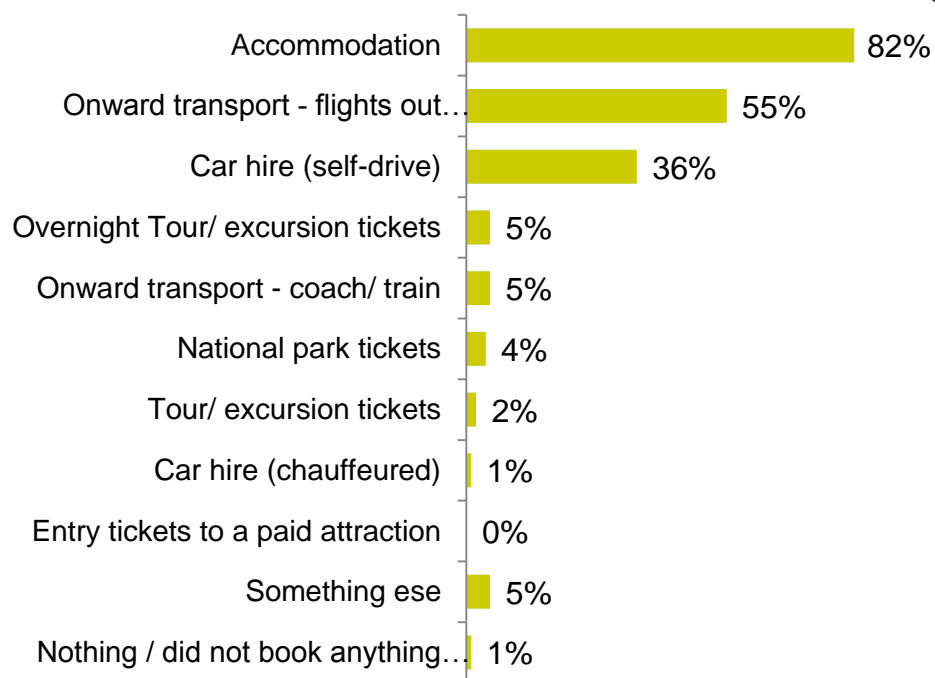
Source: Q9. Did you **plan** any parts of your itinerary for visiting the Darwin / Top End region prior to arriving?
Q11. What, if any, elements of your time in and around Darwin did you **book** in advance?
Q12. And how did you book these?

Base: All respondents n=604 and those who did not book anything in advance n=6

Planning for visit to Darwin

How does dispersal impact on items booked in advance?

Items booked in advance



- Accommodation -
 - 74% of Darwin only visitors
 - 91% of Daytrippers
 - 79% of Overnights
- Onward Transport
 - 55% of Darwin only visitors
 - 58% of Daytrippers
 - 52% of Overnights
- Car hire (self-drive)
 - 25% of Darwin only visitors
 - 34% of Daytrippers
 - 50% of Overnights

Source: Q9. Did you **plan** any parts of your itinerary for visiting the Darwin / Top End region prior to arriving?
 Q11. What, if any, elements of your time in and around Darwin did you **book** in advance?
 Base: All respondents n=604 and those who did not book anything in advance n=6

Planning for visit to Darwin – Domestic visitors

Items booked in advance are fairly consistent amongst overseas & domestic visitors, however greater usage of the internet amongst overseas visitors

Planned trip

	Wave 1	Wave 2	Total
Yes	67%	82%	75%
No	33%	18%	25%

* Statements split into two in Wave 2



Items booked in advance

	Wave 1	Wave 2	Total
Accommodation	85%	81%	83%
Onward transport - flights out of Darwin	62%	54%	57%
Car hire (self-drive)	41%	31%	37%
Tour/ excursion tickets*	20%	-	
National park tickets	6%	2%	5%
Overnight tour / excursion tickets*	-	6%	4%
Day tour / excursion tickets*		5%	4%
Something else	8%	4%	3%
Onward transport - coach/ train	4%	4%	4%
Nothing / did not book anything in advance	1%	1%	1%



Mode of booking

	Wave 1	Wave 2	Total
Website - direct with the supplier	45%	36%	40%
In person - through a travel agent/visitor information centre	30%	25%	27%
Website – other	21%	30%	26%
Telephone - direct with the supplier	18%	3%	10%
Telephone - through a travel agent	12%	10%	11%
In person - direct with the supplier	6%	4%	5%
Email - direct with the supplier	2%	1%	2%
Email - other	2%	2%	2%
Some other way	2%	1%	1%



Significantly higher against previous wave



Significantly lower against previous wave

Source: Q9. Did you **plan** any parts of your itinerary for visiting the Darwin / Top End region prior to arriving?

Q11. What, if any, elements of your time in and around Darwin did you **book** in advance?

Q12. And how did you book these?

Base: All respondents (domestic visitors) n=310

Planning for visit to Darwin – Overseas visitors

Items booked in advance are fairly consistent amongst overseas & domestic visitors, however greater usage of the internet amongst overseas visitors

Planned trip

	Wave 1	Wave 2	Total
Yes	63%	93%	78%
No	37%	7%	22%

* Statements split into two in Wave 2

Items booked in advance

	Wave 1	Wave 2	Total
Accommodation	86%	77%	81%
Onward transport - flights out of Darwin	58%	47%	51%
Car hire (self-drive)	44%	33%	37%
Onward transport - coach/ train	7%	6%	6%
Tour/ excursion tickets*	17%	-	-
Overnight Tour/ excursion tickets*	-	13%	7%
National park tickets	7%	6%	5%
Day trip / excursion tickets*	-	5%	3%
Car hire (chauffeured)	2%	-	1%
Entry tickets to a paid attraction	2%	-	1%
Something else	8%	1%	3%

Mode of booking

	Wave 1	Wave 2	Total
Website - direct with the supplier	47%	50%	49%
In person - through a travel agent / visitor information centre	49%	20% ↓	32%
Website - other	32%	43%	39%
Telephone - through a travel agent	12%	3%	7%
Email - other	2%	8%	5%
Email - direct with the supplier	5%	3%	4%
Telephone - direct with the supplier	-	1%	1%
In person - direct with the supplier	2%	1%	1%
Some other way	5%	1%	3%



Significantly higher against previous wave



Significantly lower against previous wave

Source: Q9. Did you **plan** any parts of your itinerary for visiting the Darwin / Top End region prior to arriving?

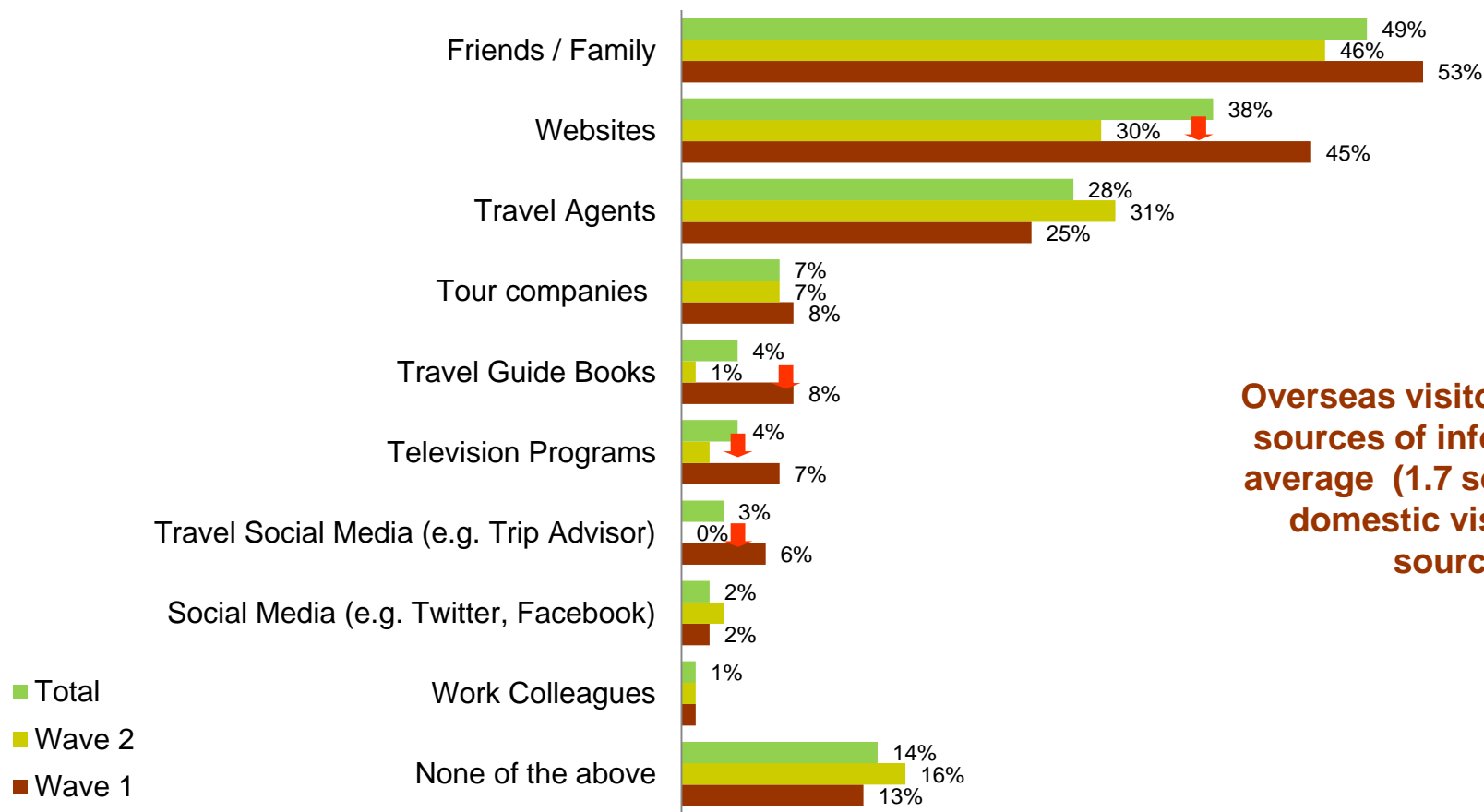
Q11. What, if any, elements of your time in and around Darwin did you **book** in advance?

Q12. And how did you book these?

Base: All respondents (overseas visitors) n=147

Information sources used to plan the trip (Total)

Friends and family were an important information source when planning trips, in both the shoulder & the peak season, as is the internet



Overseas visitors use more sources of information on average (1.7 sources) than domestic visitors (1.3 sources)



Significantly higher against previous wave



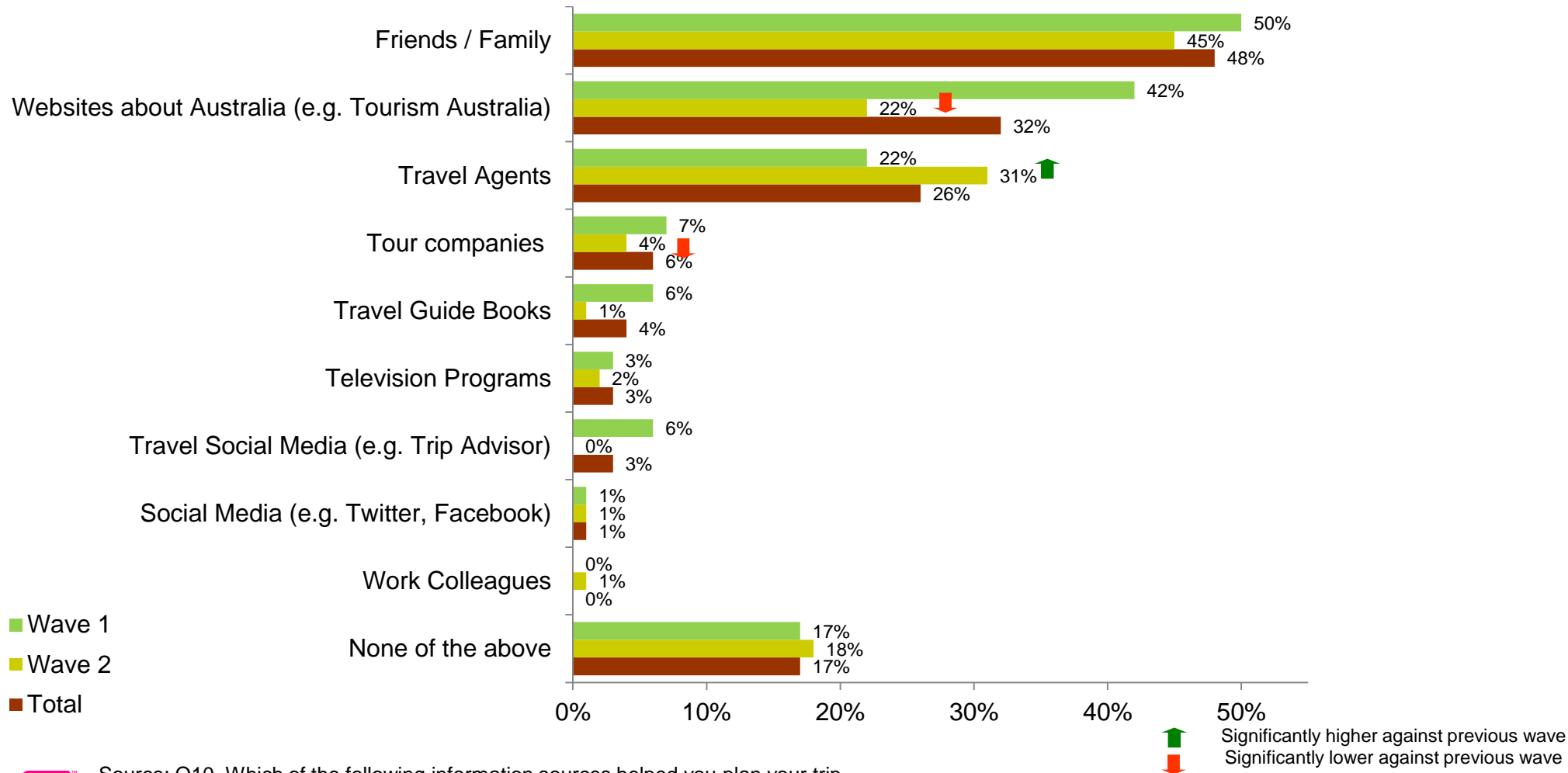
Significantly lower against previous wave

■ Total
■ Wave 2
■ Wave 1

Source: Q10. Which of the following information sources helped you plan your trip to the Darwin and the Top End region?
Base: All respondents n=302 per wave

Information sources used to plan the trip – Domestic visitors

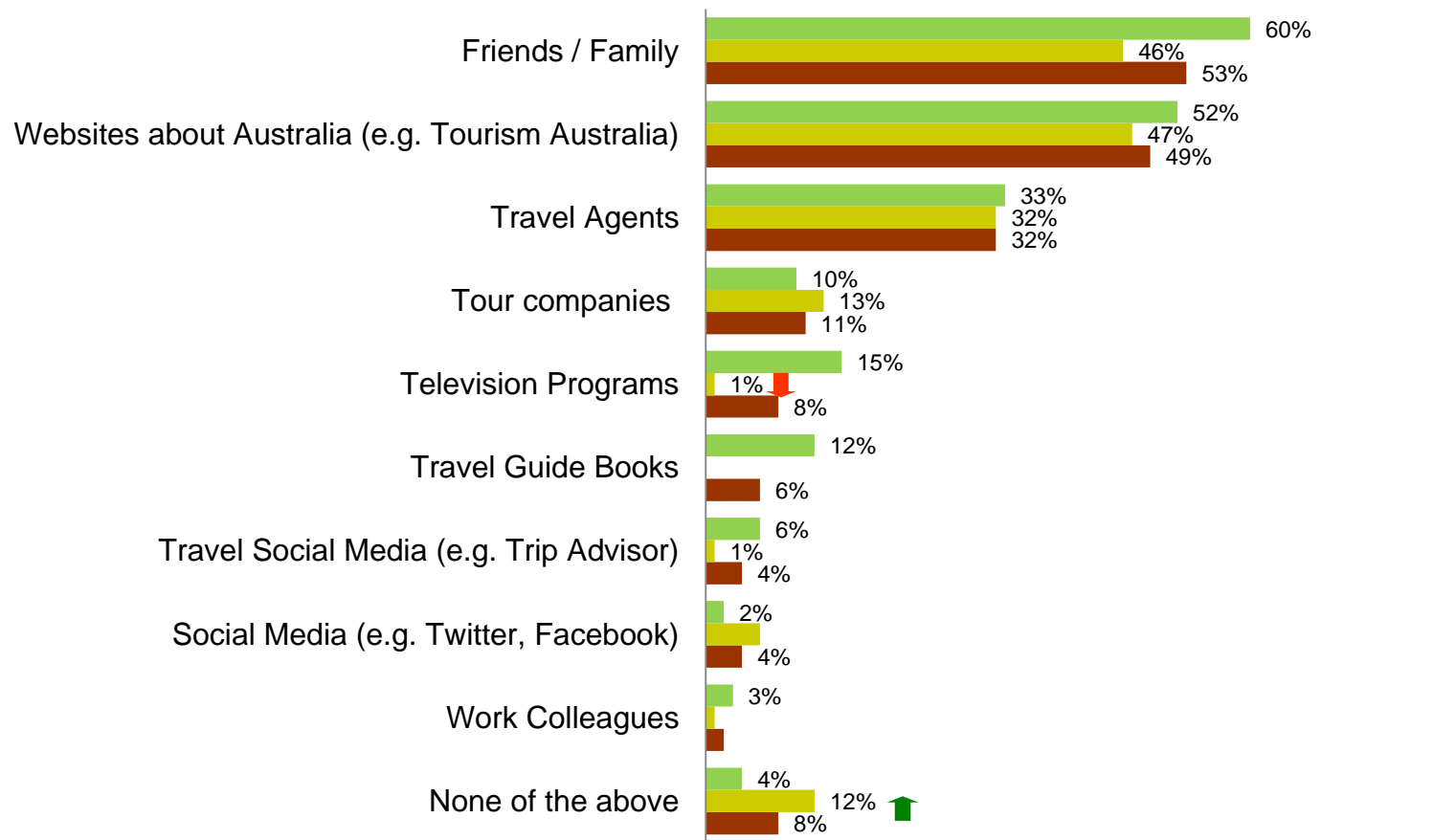
Friends and family remain an important information source when planning trips, as is online
Domestic visitors tend to use less information sources



Source: Q10. Which of the following information sources helped you plan your trip to the Darwin and the Top End region?
Base: All respondents n=302 per wave

Information sources used to plan the trip – Overseas visitors

Friends and family remain an important information source when planning trips, as is online
Overseas visitors tend to use more information sources



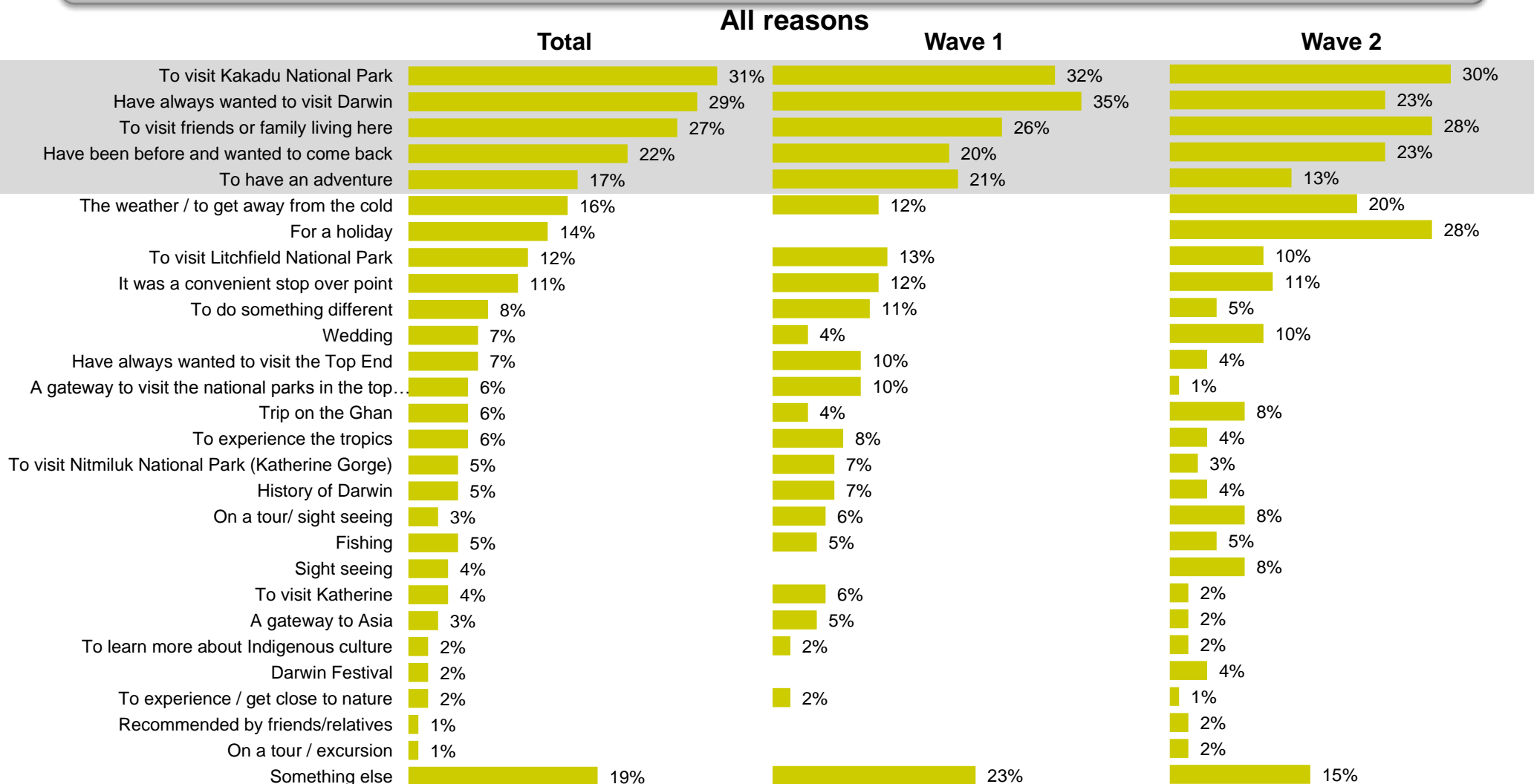
■ Wave 1
■ Wave 2
■ Total

↑ Significantly higher against previous wave
↓ Significantly lower against previous wave

Source: Q10. Which of the following information sources helped you plan your trip to the Darwin and the Top End region?
Base: All respondents n=302 per wave

Reasons for coming to Darwin / the Top End Region

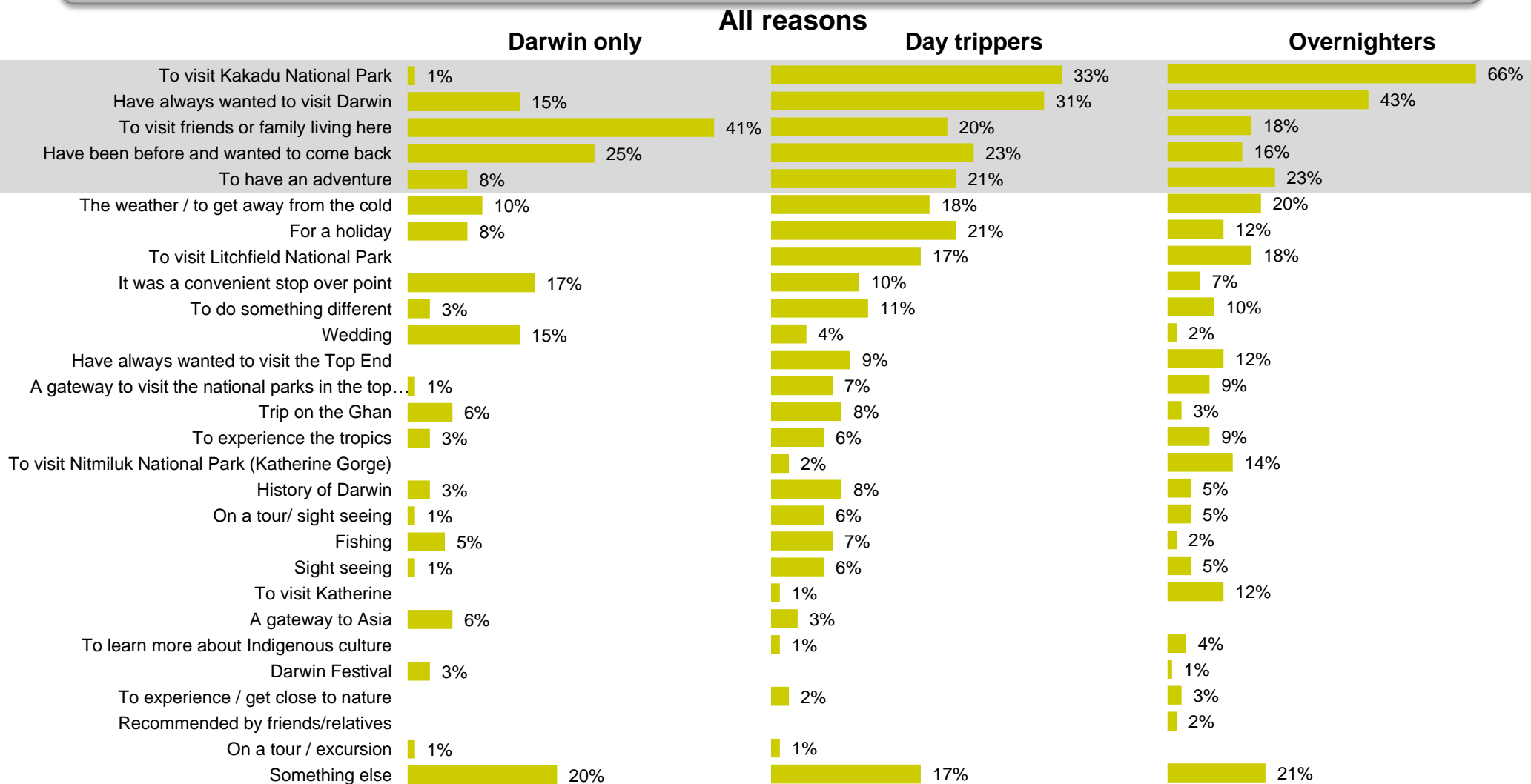
Kakadu is a key driver for visitation to Darwin & the Top End, in both peak & shoulder season. The weather is also a key drawcard in peak season.



Source: Q7/ Q8. What were your reasons for coming to the Darwin / Top End region?
Base: All respondents n=302 per wave

Reasons for coming to Darwin / the Top End Region

Some differences in reasons for coming to the Darwin / the Top End region exist.

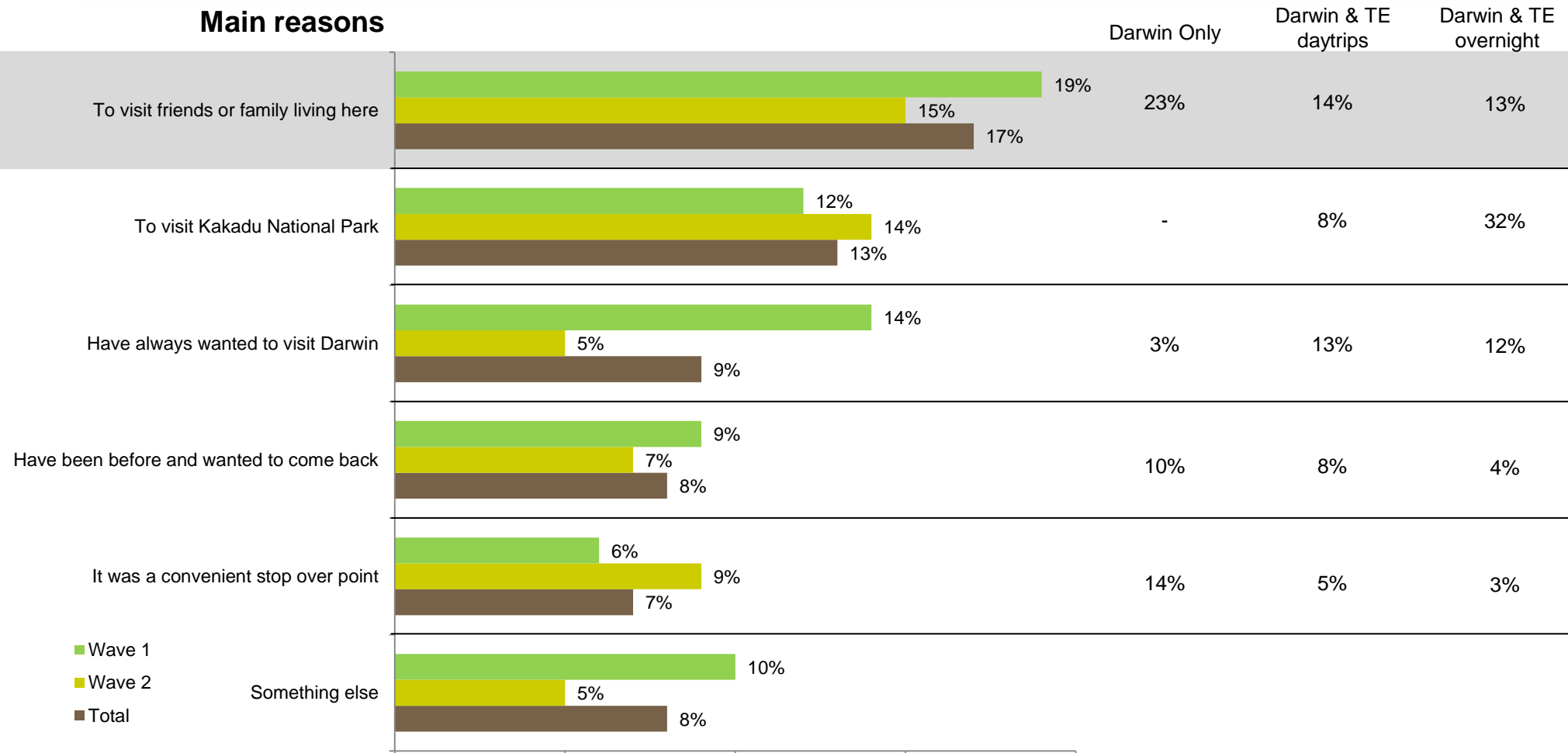


Source: Q7/ Q8. What were your reasons for coming to the Darwin / Top End region?
Base: All respondents n=302 per wave

Main reason for coming to Darwin / the Top End Region

Visiting friends and family is the key motivator for coming to Darwin & the Top End, with Kakadu a primary focus for those dispersing

Main reasons

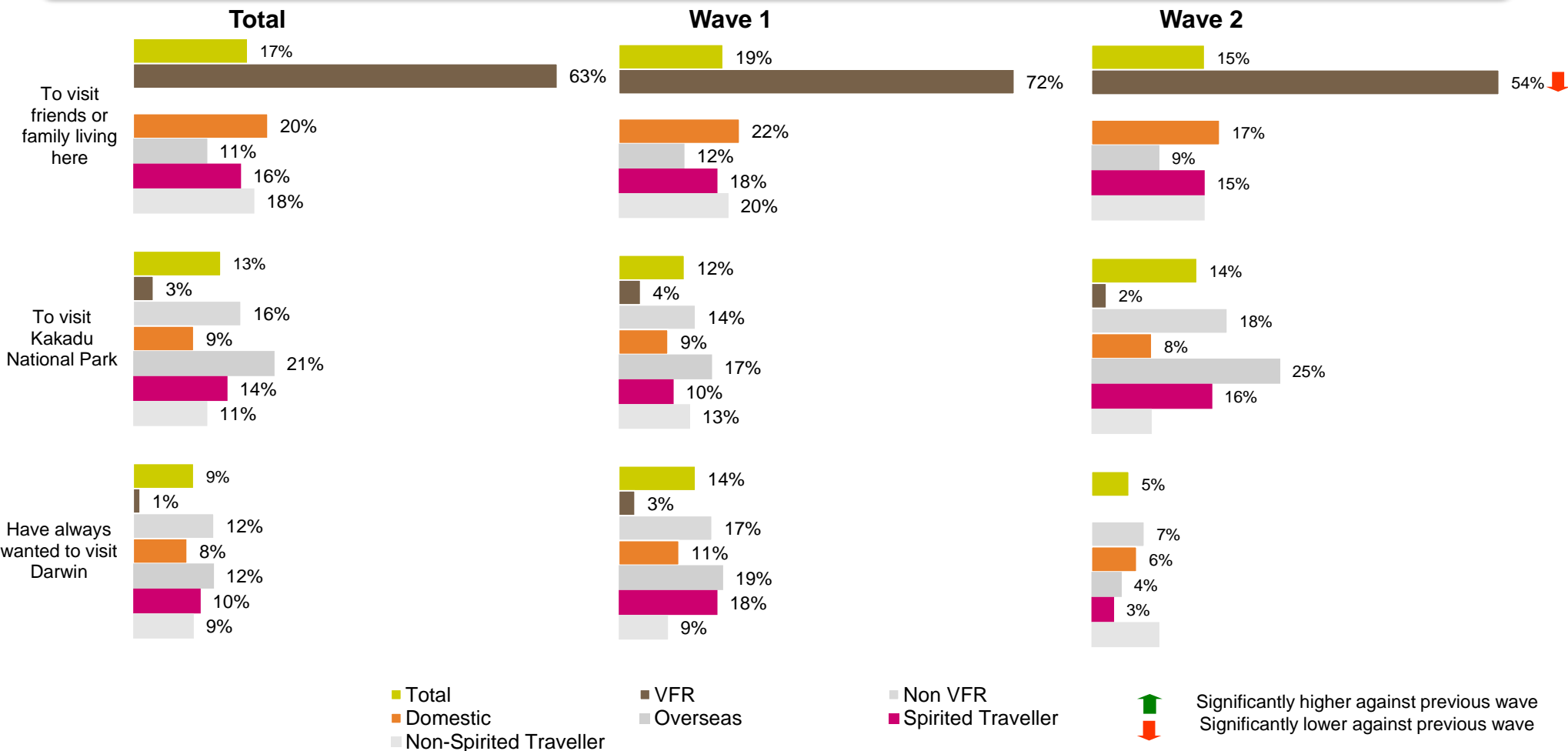


■ Wave 1
■ Wave 2
■ Total

Source: Q7/ Q8. What was the main reason for coming to the Darwin / Top End region?
Base: All respondents n=604

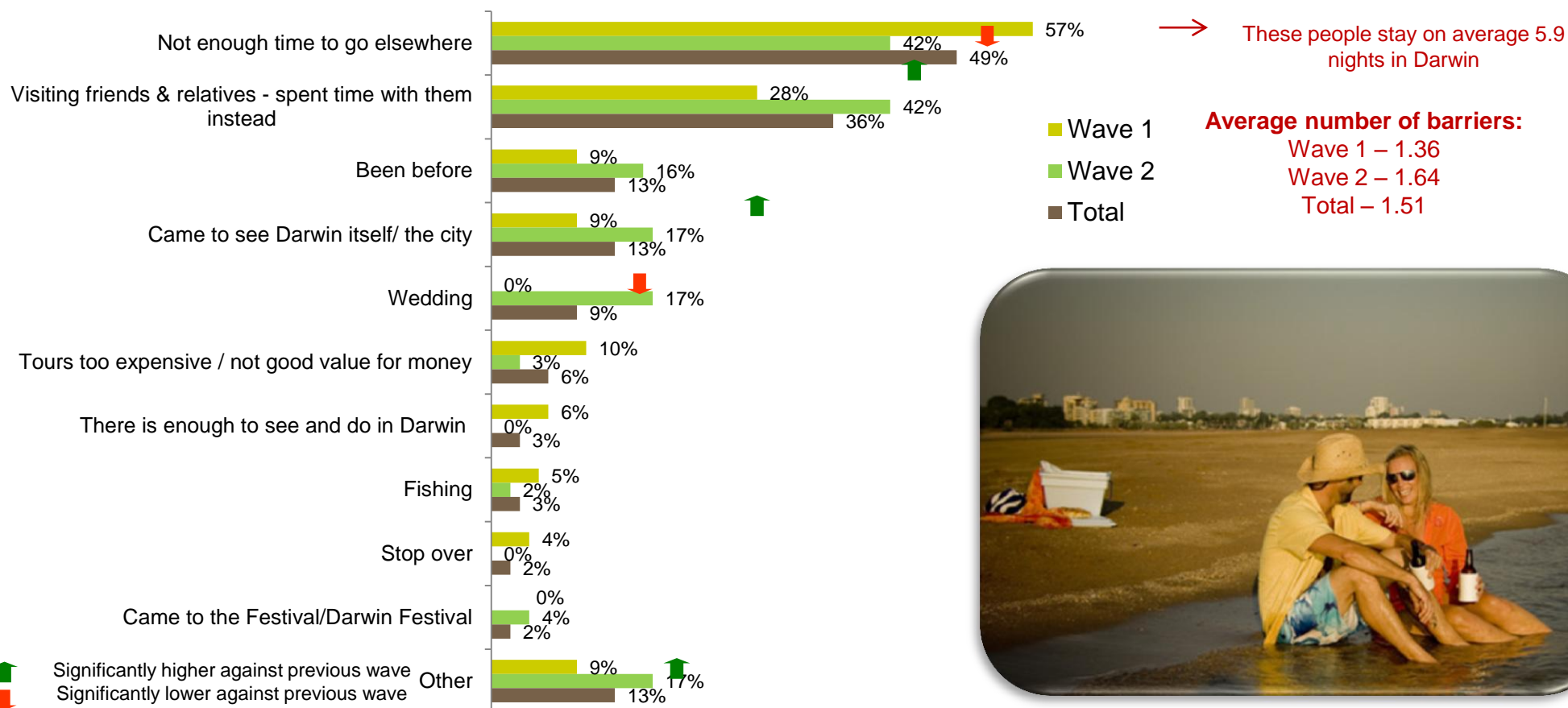
Main Reasons for coming to Darwin / the Top End Region - Top 3 reasons, split by sub-group

Visiting friends and family is the main reason for coming to Darwin / the Top End region for both VFR travellers and most other visitor types



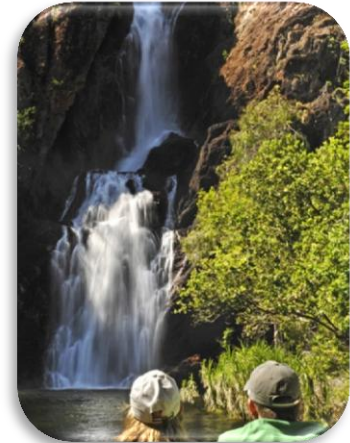
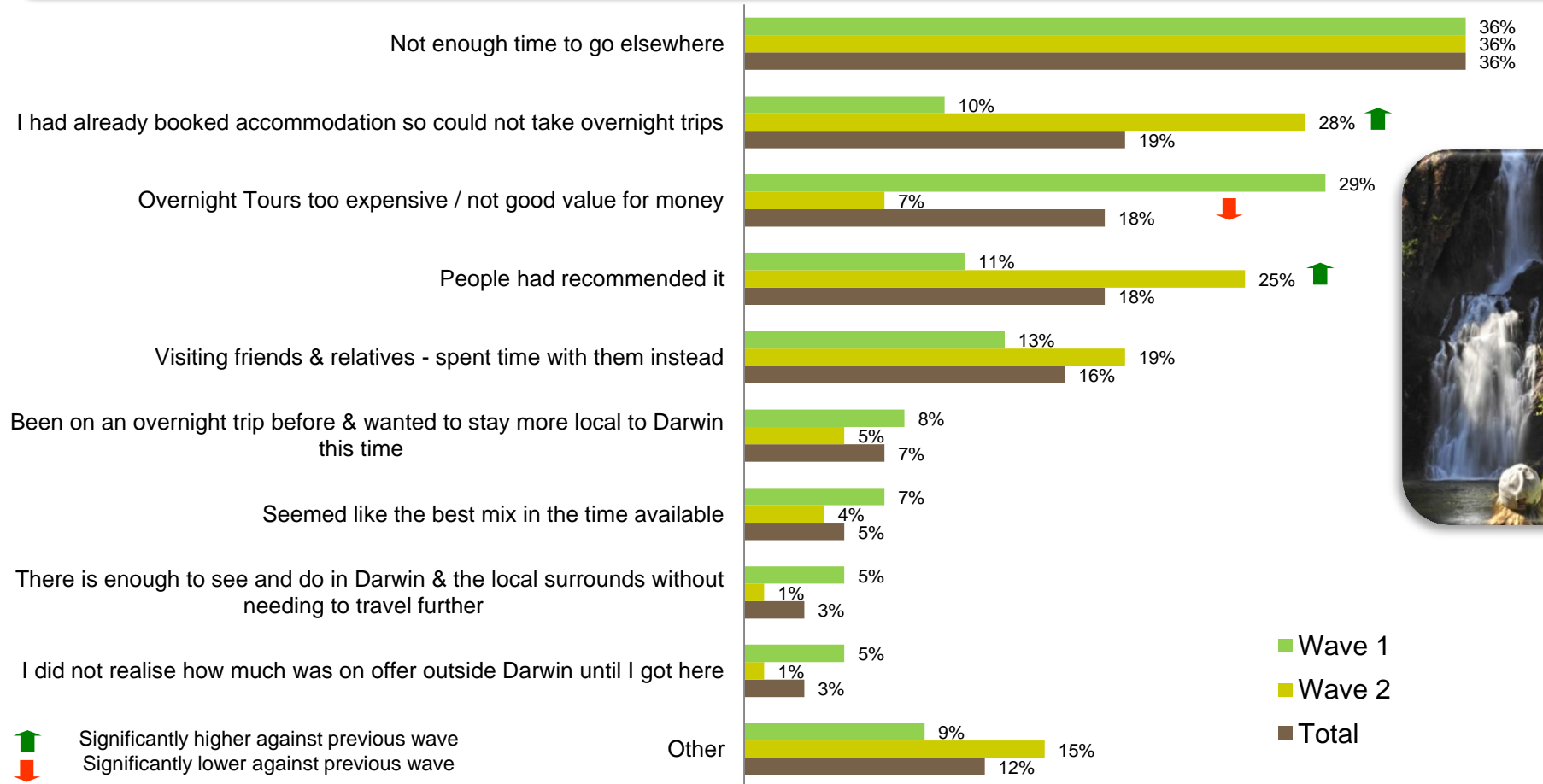
Barriers for not dispersing beyond Darwin (amongst those visiting Darwin only)

For those staying within Darwin, key barriers to dispersal cited were that there was not enough time to go further afield (particularly mentioned in the shoulder season) and that they were visiting friends and family (peak season). Providing example itineraries to potential visitors, as well as to those hosting visitors, may assist to increase dispersal.



Barriers for not staying overnight in the Top End (amongst those visiting Darwin / taking day trips)

For those going on day trips beyond Darwin, again time was mentioned as a key factor and a feeling that overnight tours were too expensive. Advance booking of accommodation is a greater barrier in peak season when availability may be an issue – raising awareness of overnight trips earlier in the decision-making process is key.



Significantly higher against previous wave



Significantly lower against previous wave

Wave 1
Wave 2
Total

Barriers to Dispersal by Age

Barriers to non-dispersal from Darwin:

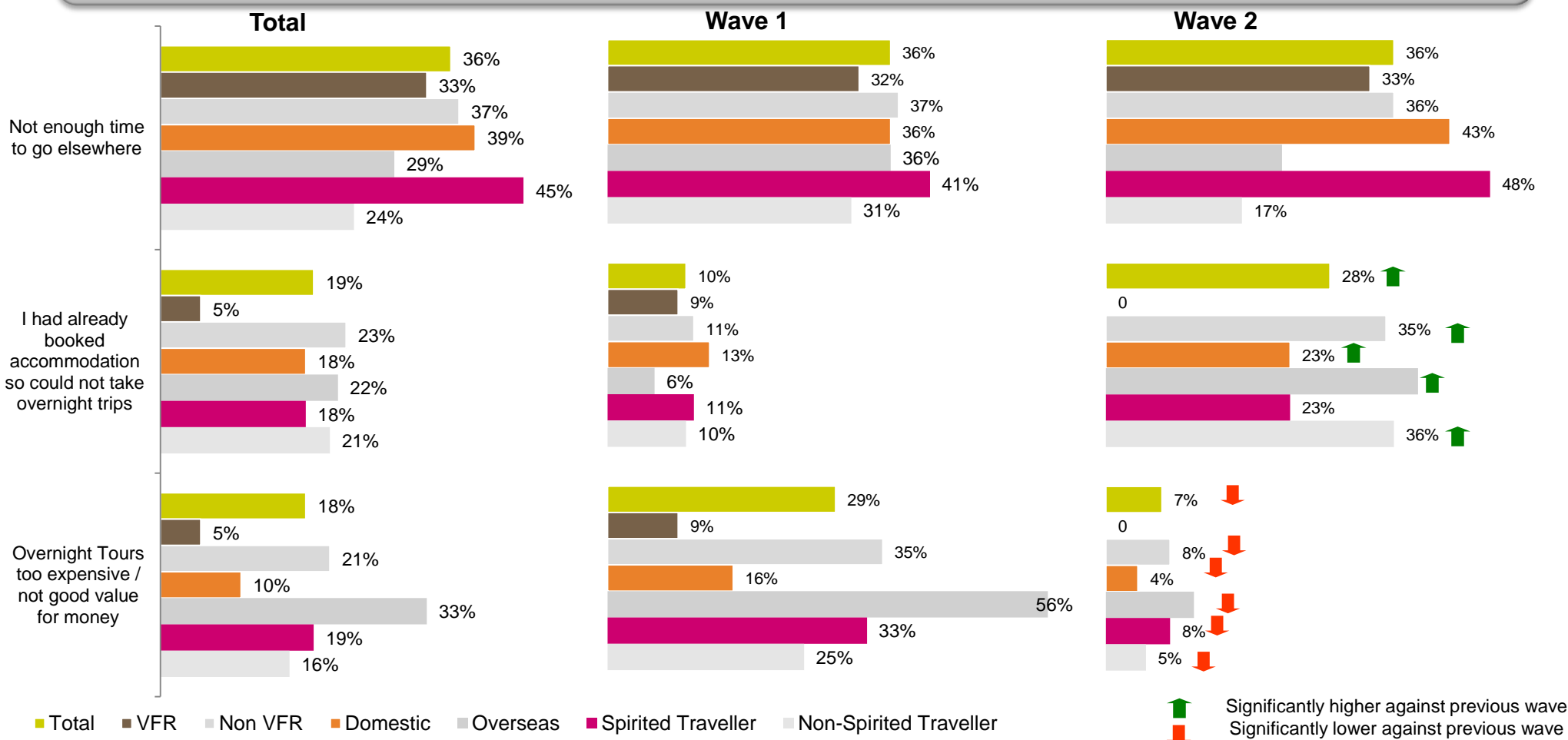
- Not enough time to go elsewhere: 49%
 - Least likely to be younger (32% of 18-24)
 - More likely to be 25 to 34 (55%) or 65+ (61%)
- Visiting Friends & Relatives: 36%
 - Less likely to be younger (27% of 18-24) or 55-64 year olds (26%)
 - More likely to be 35-44 (55%)
- Been Before: 13%
 - More likely to be over 45 (particularly 55-64 year olds – 26%)
- Came to see Darwin itself: 13%
 - More likely to be younger (27% of 18-24 year olds)

Barriers to overnight trips:

- Not enough time to go elsewhere: 36%
 - Most likely to be 35-44 (59%)
 - Least likely to be 55-64 (18%)
- I had already booked accommodation: 19%
 - Most likely to be younger (32% of 18-24) or 55-64 (32%)
 - Least likely to be ages 25-54 (13%)
- Overnight tours not good value for money: 18%
 - More likely to be younger (31% of 18-34)
 - Less likely to be over 55 (3%)
- People had recommended it: 18%
 - No age skew
- Visiting friends & family: 16%
 - Most likely to be 35-64 (23%)

Barriers for not staying overnight in the Top End (amongst those visiting Darwin / taking day trips) - Top 3 reasons

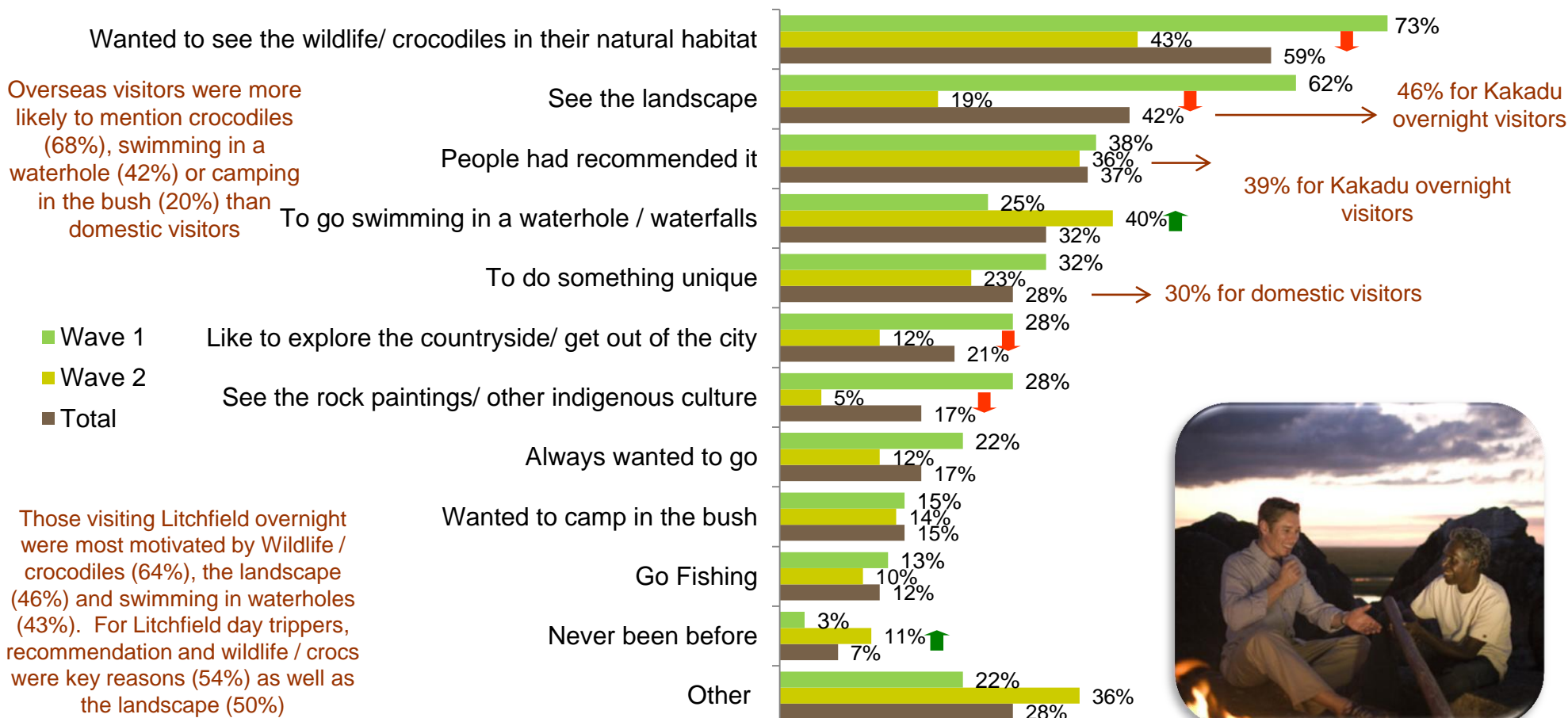
Overseas visitors were particularly likely to see overnight tours as too expensive. Communicating the benefits of the experience offered by trips to the Top End is key



46 tns Source: Q15b. And why did you decide to take a day tour rather than to stay in Darwin or go overnight?
 Base: All respondents who visited Darwin as well as took day trips to the Top end region n=212 (Wave 1 n=99, Wave 2)

Motivations to take overnight tours to Top End region

Wildlife and crocodiles were the key reason for almost three-quarters of those going on overnight tours to the Top End (W1), with the landscape also key (both particularly mentioned in the shoulder season). Swimming in waterholes is most likely to be mentioned in peak season.



Average number of motivations mentioned was 3.1 with overseas visitors likely to have more (3.3) than domestic (2.9)



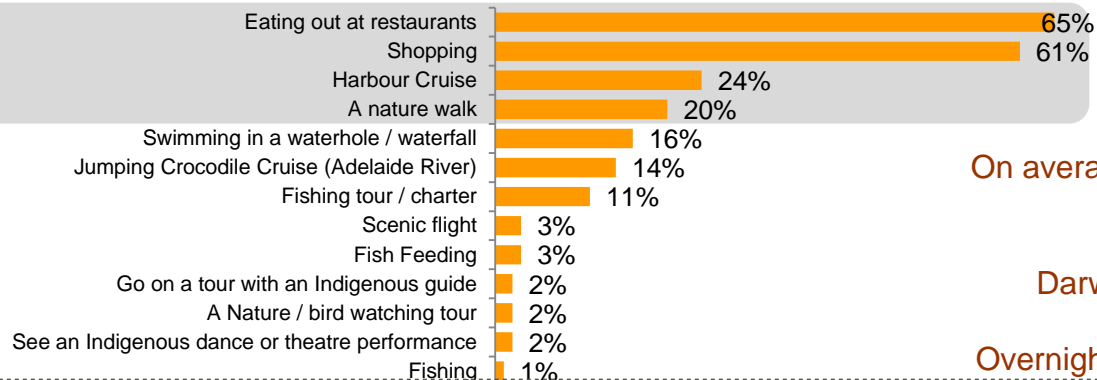
↑ Significantly higher against previous wave
↓ Significantly lower against previous wave

Source: Q16. And what made you decide to travel beyond Darwin to some of the Top End on this trip?
Base: All respondents who visited Darwin as well as took overnight trips to other parts of Top end region n=180 (wave 1 n=97 wave 2 n=83)

Activities done/ attractions visited during the trip (Total)

Two thirds ate out at restaurants during their trip & half visit Mindil Beach Markets & the Waterfront. Shopping was also a primary activity.

Activities done

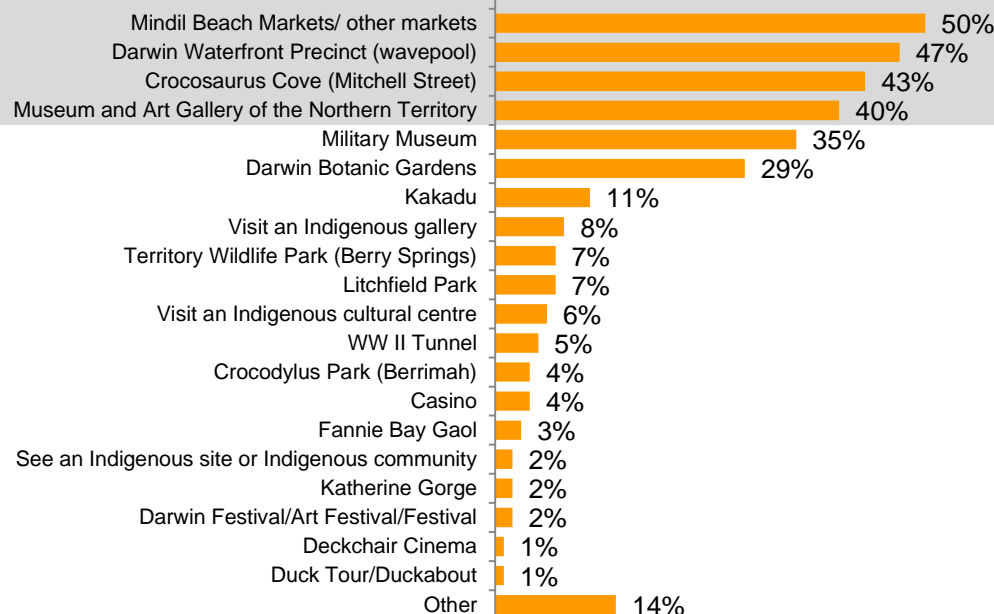


On average, 5.2 activities are done / places are visited

Darwin only visitors do 4.4;
Daytrippers do 5.4

Overnight visitors do the most at an average of 6.0

Places visited

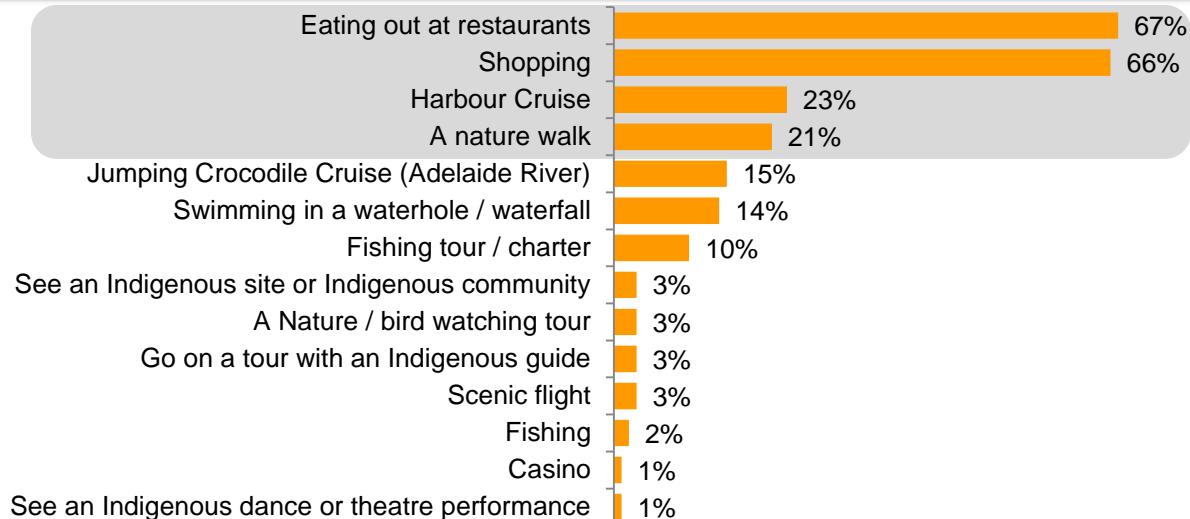


Source: Q17. And during your time in the Darwin and the Top End region, which of the following have you visited or done?

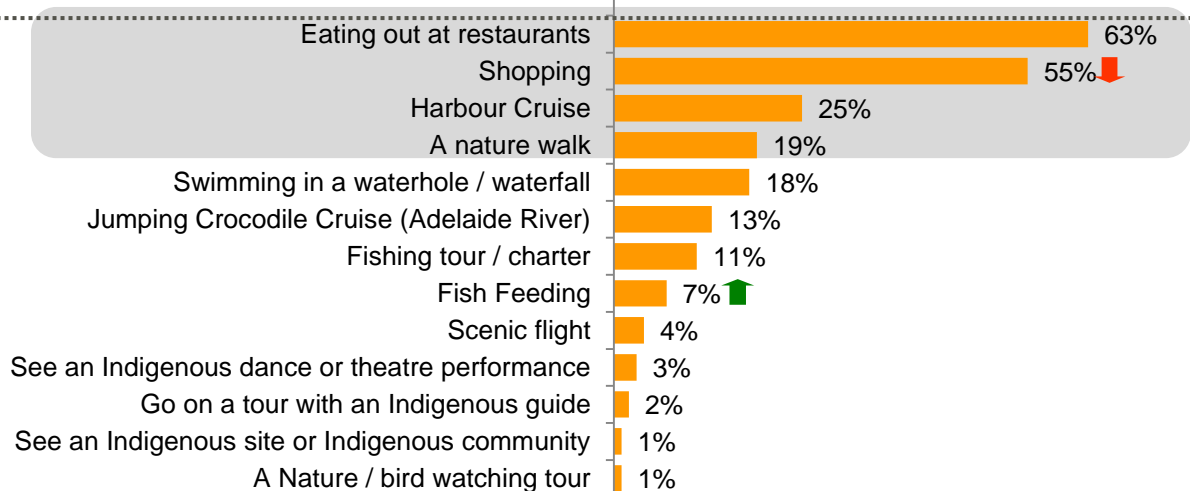
Base: All respondents n=604

Activities done (Wave 1 vs. Wave 2)

Highest incidence of shopping during the shoulder season



Wave 1



Wave 2

↑ Significantly higher against previous wave
↓ Significantly lower against previous wave

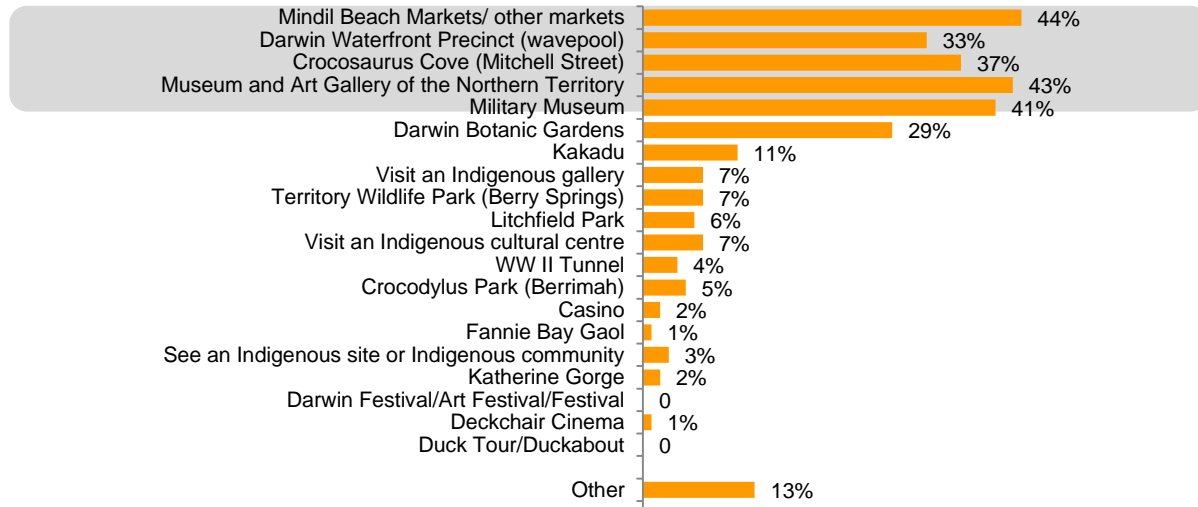
Activities done

Source: Q17. And during your time in the Darwin and the Top End region, which of the following have you visited or done?
Base: All respondents n=302 per wave

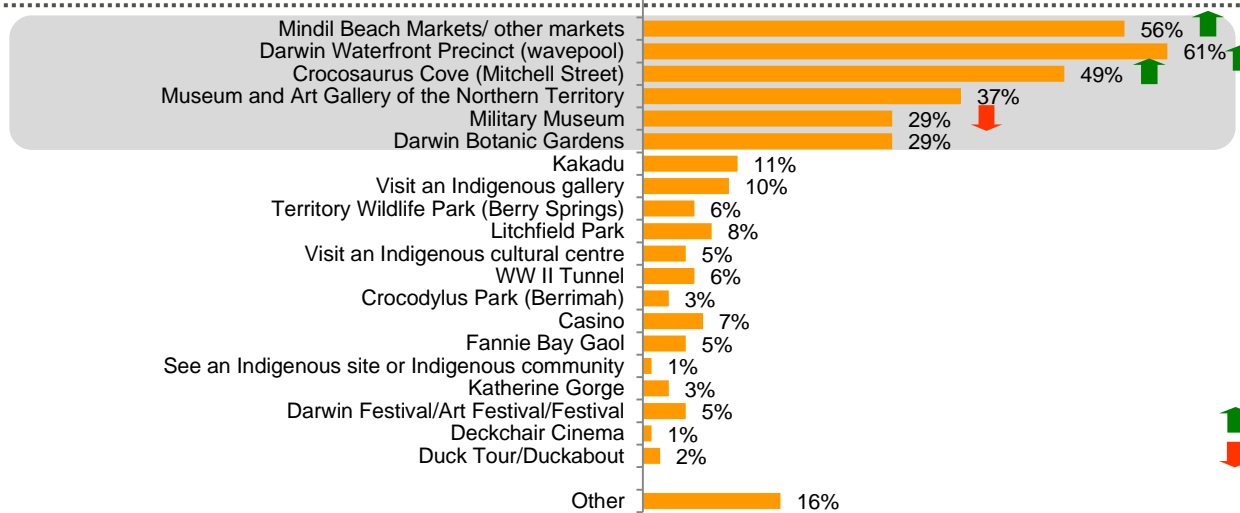
Destinations visited (Wave 1 vs. Wave 2)

Higher visitation of outdoor places such as the Darwin Waterfront Precinct & Mindil Beach markets in the peak season when the weather is more appealing

Places visited



Wave 1



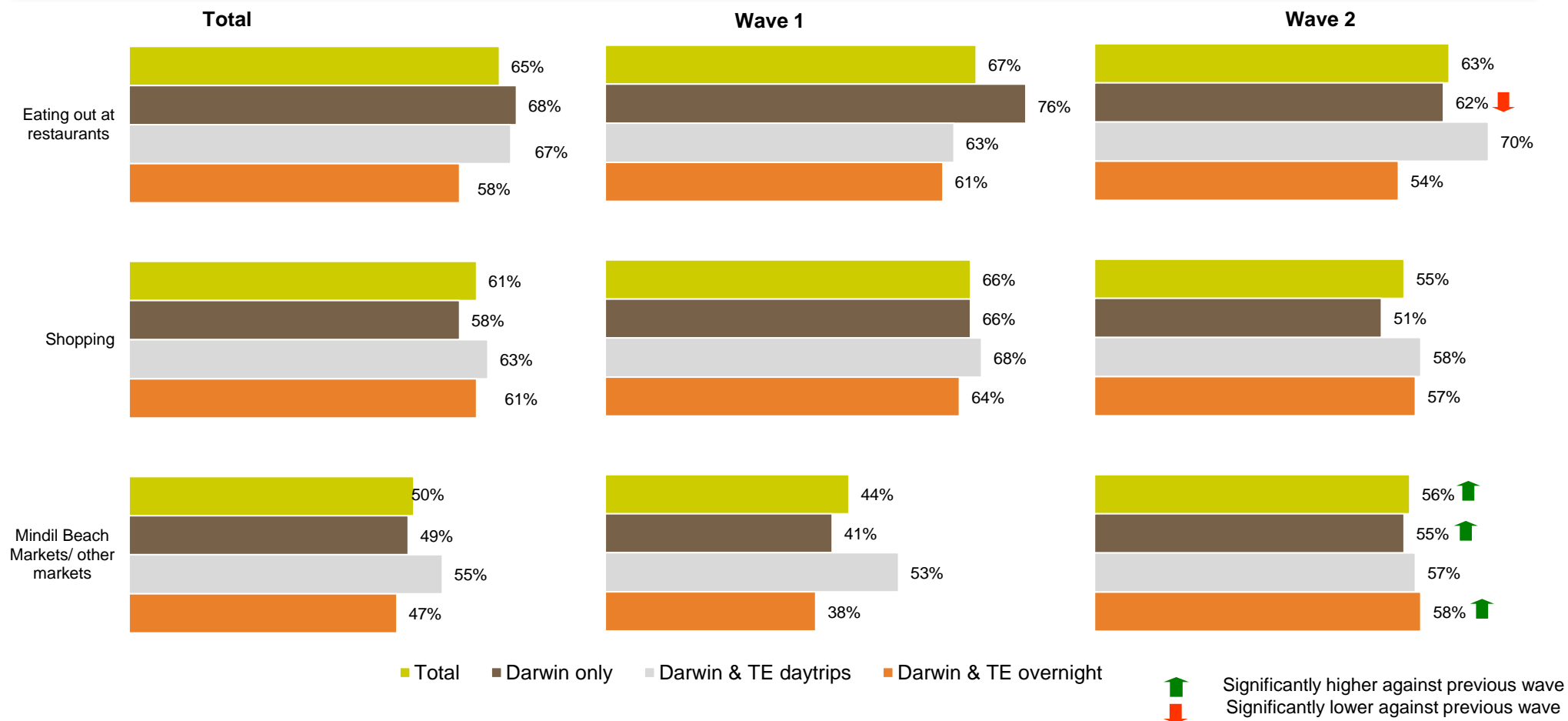
Wave 2

↑ Significantly higher against previous wave
↓ Significantly lower against previous wave

Source: Q17. And during your time in the Darwin and the Top End region, which of the following have you visited or done?
Base: All respondents n=302 per wave

Activities done or destinations visited during the trip

Less variation in activities taken with regard to dispersal type

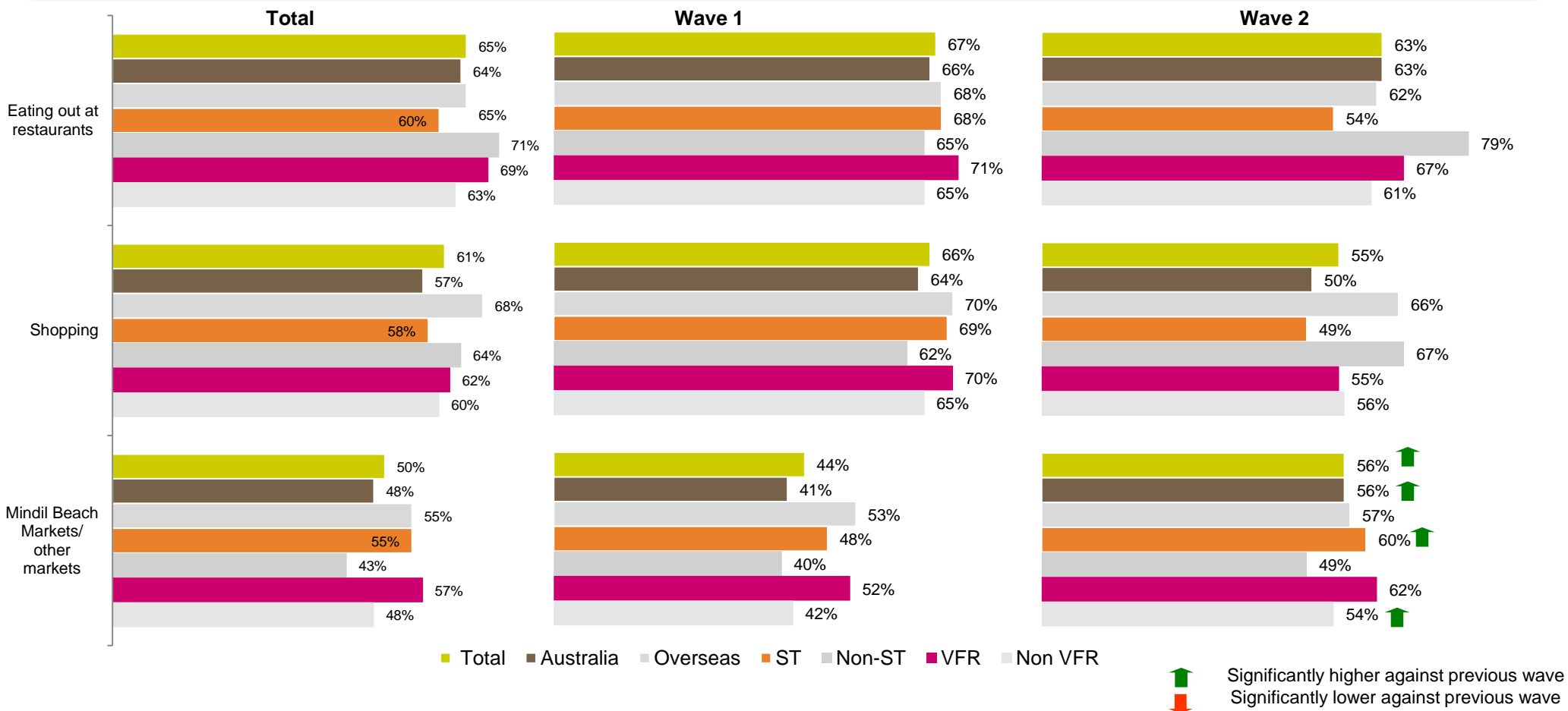


Source: Q17. And during your time in the Darwin and the Top End region, which of the following have you visited or done?

Base: All respondents n=604, n=302 per wave

Activities done or destinations visited during the trip

There is some variation by visitor type and season with regard to activities partaken in whilst in Darwin. For example, higher visitation of the Mindil Beach markets in peak season



Source: Q17. And during your time in the Darwin and the Top End region, which of the following have you visited or done?

Base: All respondents n=604, n=302 per wave

Perceptions of Darwin and the Top End Region

Jabiru fishing



IMAGE COURTESY OF TOURISM NT



Spontaneous reaction about Darwin/ Top End region

Wildlife & the climate are the two things that spontaneously spring to mind when respondents think of Darwin / the Top End region

Coded Responses

Wild life-crocodiles, dingo	42%
Hot/ steamy	32%
Kakadu	28%
Tropical	12%
Good weather/ warm	11%
National park	10%
Relaxed/ casual/ laid back	10%
Cyclone/ Cyclone Tracy	10%
Fishing/ good fishing	9%
Other positive comments	9%
Attractive/ beautiful place	9%
OTHER COMMENTS	7%
Meet family members/ friends	7%
Plenty to do / plenty to see	6%
Locals-friendly/ helpful	6%
History (bombing during the war)	6%
Stop over point	5%
Been before	5%
Beautiful landscape	4%
Waterfalls	4%
Aboriginal culture	4%
Holiday	3%

“Kakadu, beautiful waterfalls and **wildlife** in its natural habitat”

“Beautiful sunsets, beautiful waterways, lush greenery and **waterfalls**”

“Everything’s on your doorstep and **accessible**”



What did respondents say?

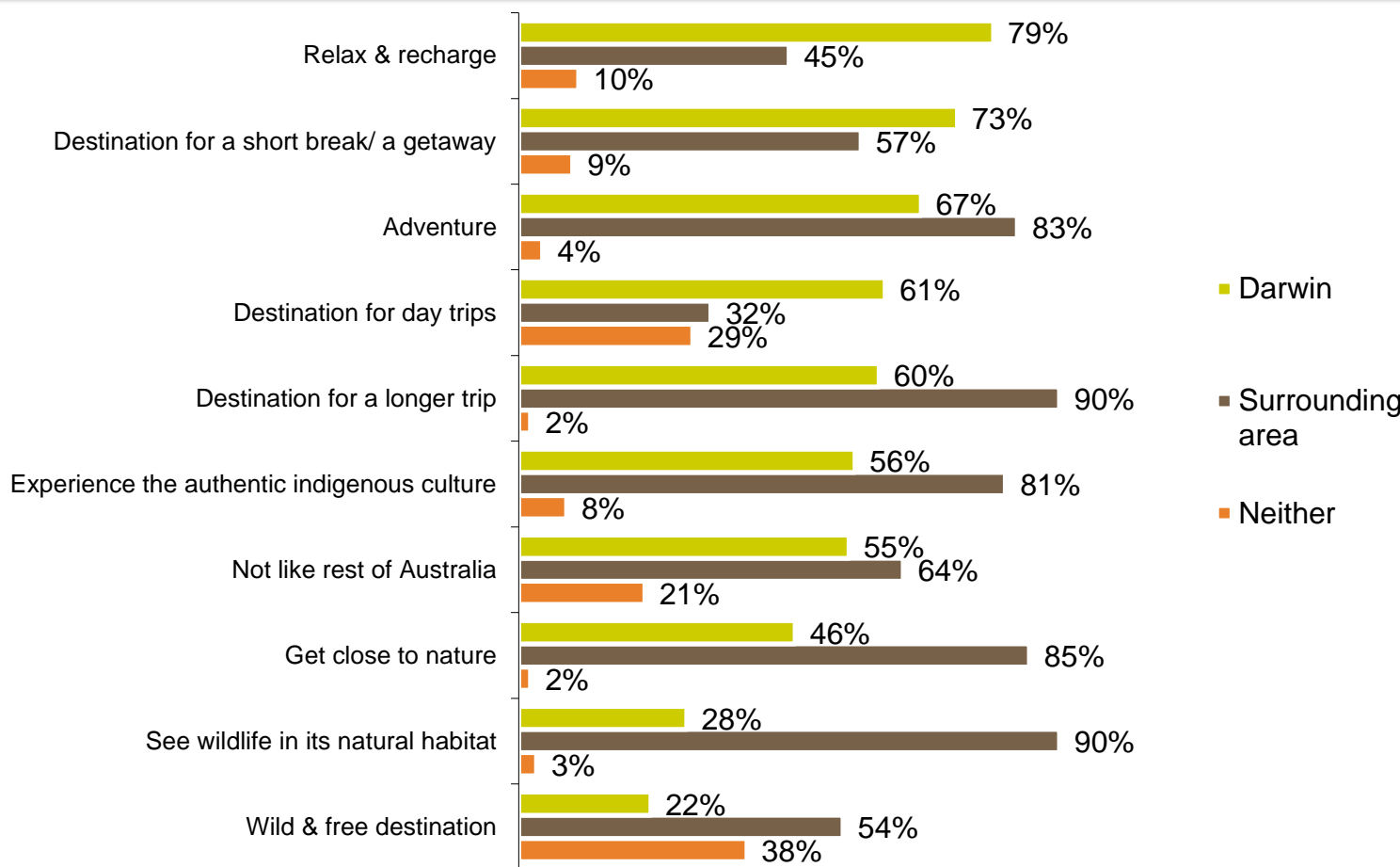
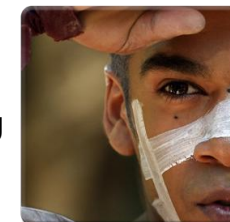
“**Fantastic weather**, unique and extraordinary **landscape** and friendly people”

“Really lovely, it’s **lush**, it’s interesting and lots to see and do in relation to **nature**”

“**Crocodiles**, kangaroos and swam nature in it’s **natural** home”

Perceptions of Darwin & Top End region as a leisure holiday destination (Total)

The Top End region was perceived to be a destination for a longer trip, to see wildlife in its natural habitat & to get close to nature. Darwin ranked highest for “relax & recharge”

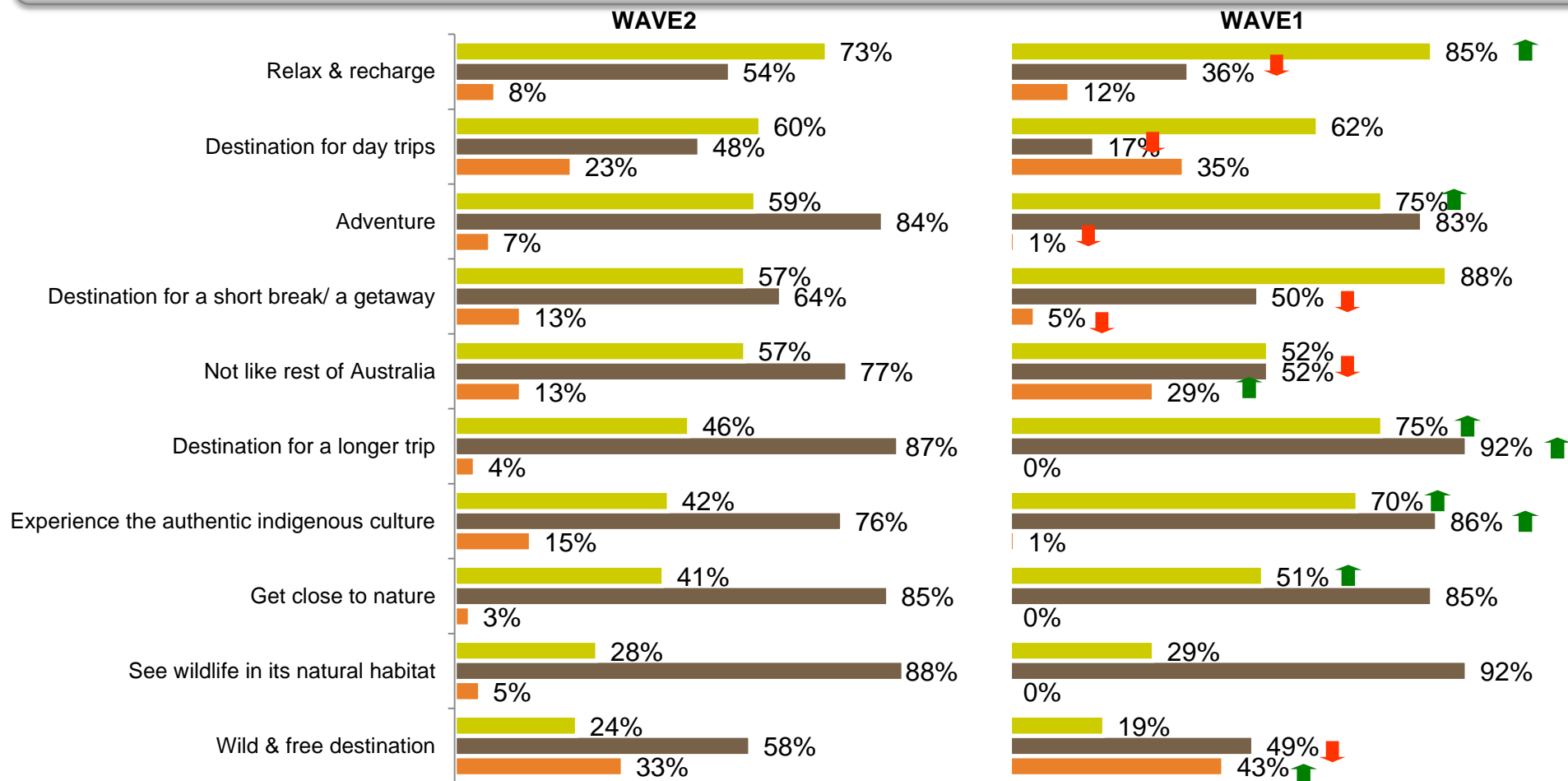


- Darwin
- Surrounding area
- Neither

Source: Q18. I'd now like you to indicate which of the following elements you associate the Darwin and the Top End region as offering as a leisure holiday destination
Base: All respondents n=604

Perceptions of Darwin & Top End region as a leisure holiday destination (Wave 1 vs. Wave 2)

Darwin is much more likely to be seen as a destination for a short break / getaway in the Peak season



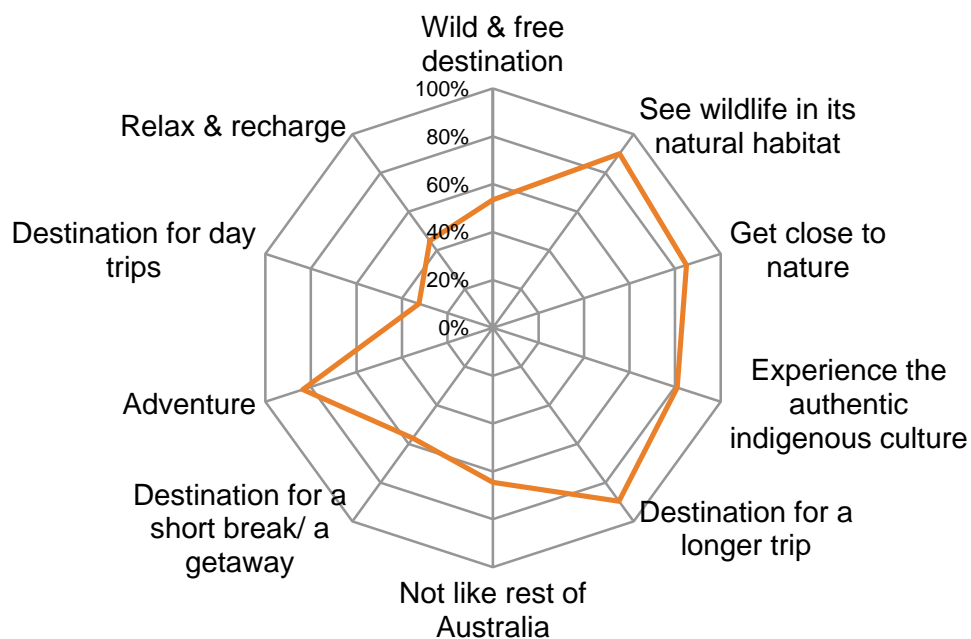
Source: Q18. I'd now like you to indicate which of the following elements you associate the Darwin and the Top End region as offering as a leisure holiday destination
Base: All respondents n=302 per wave

↑ Significantly higher result compared to previous Wave (95% confidence)
↓ Significant lower result compared to previous Wave (95% confidence)

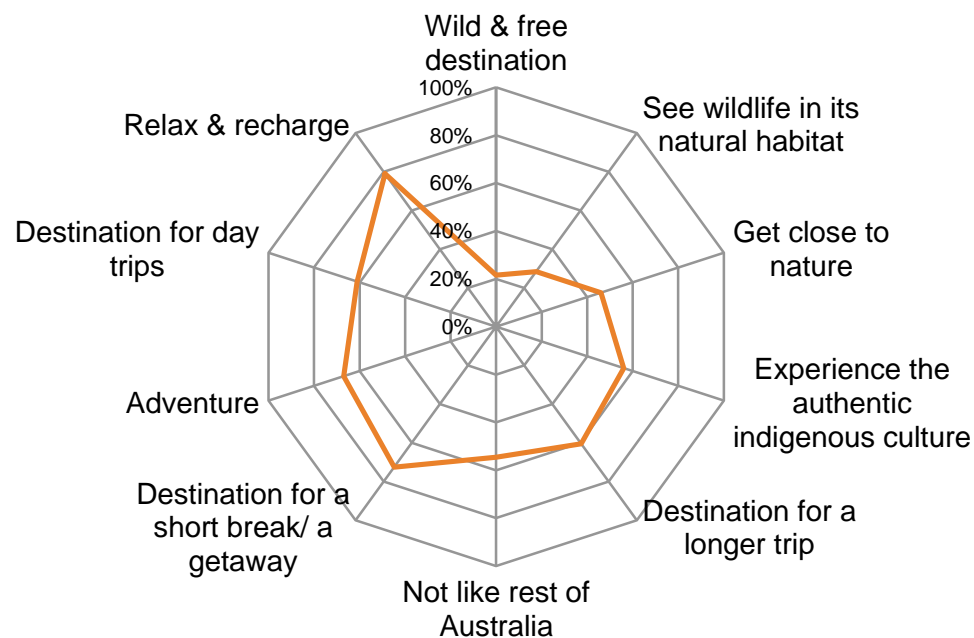
Perceptions of Darwin & Top End region as a leisure holiday destination

Significant differences in how Darwin was perceived vs. the Top End region as a whole. The latter was seen as a destination for a longer trip, to see wildlife in its natural habitat & to get close to nature. Darwin ranks highest for 'relax & recharge', particularly in the shoulder season.

Top End



Darwin



— Total

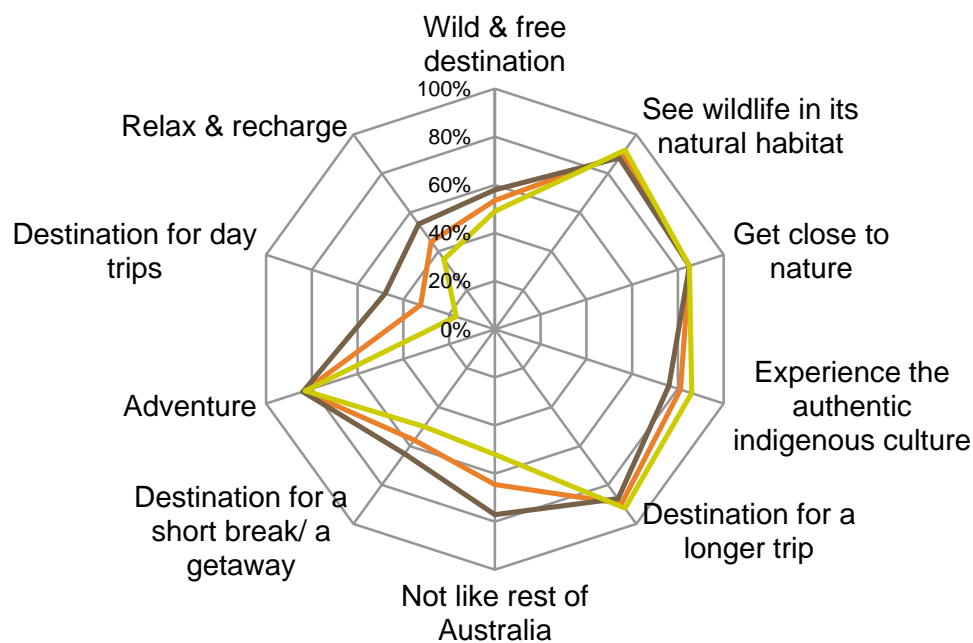


Source: Q18. I'd now like you to indicate which of the following elements you associate the Darwin and the Top End region as offering as a leisure holiday destination
Base: All respondents n=302 each wave

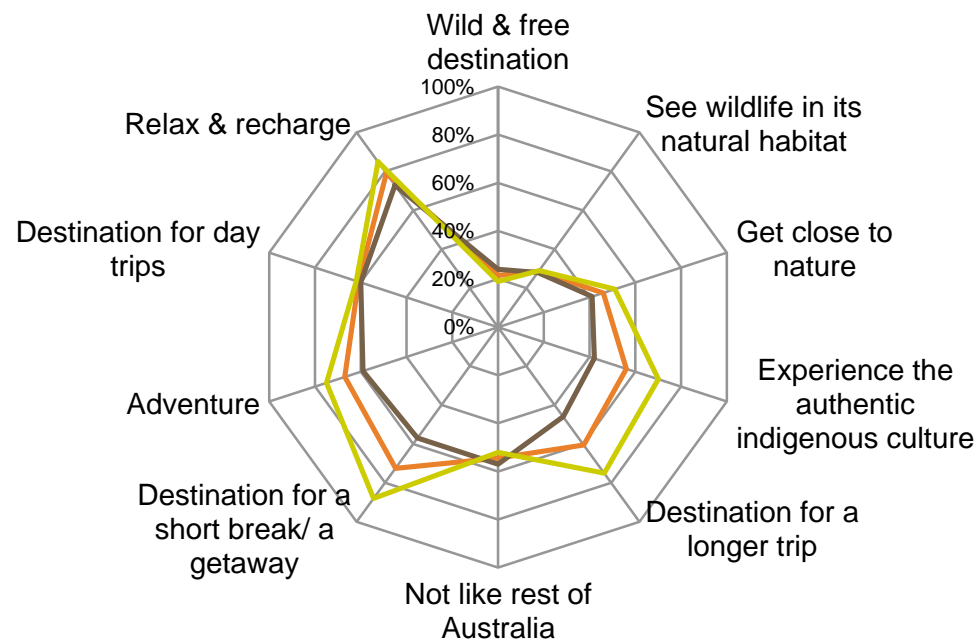
Perceptions of Darwin & Top End region as a leisure holiday destination

Significant differences in how Darwin is perceived vs the Top End region as a whole. The latter is seen as a destination for a longer trip, to see wildlife in its natural habitat & to get close to nature. Darwin ranks highest for 'relax & recharge', particularly in the shoulder season.

Top End



Darwin



— Total — Wave 1 — Wave 2



Source: Q18. I'd now like you to indicate which of the following elements you associate the Darwin and the Top End region as offering as a leisure holiday destination
Base: All respondents n=302 each wave

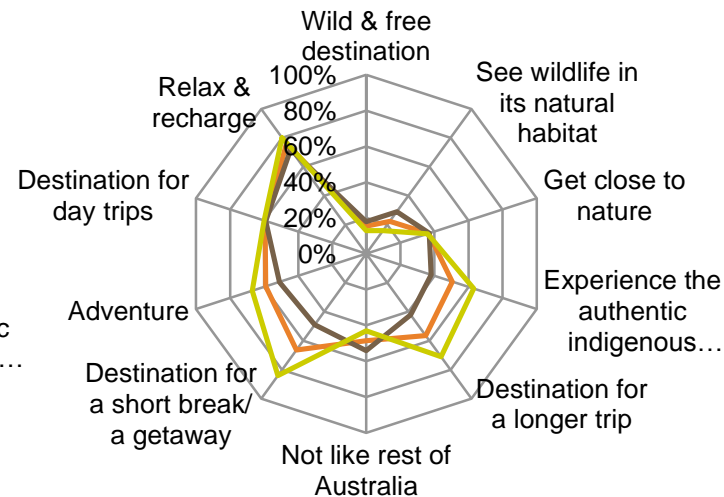
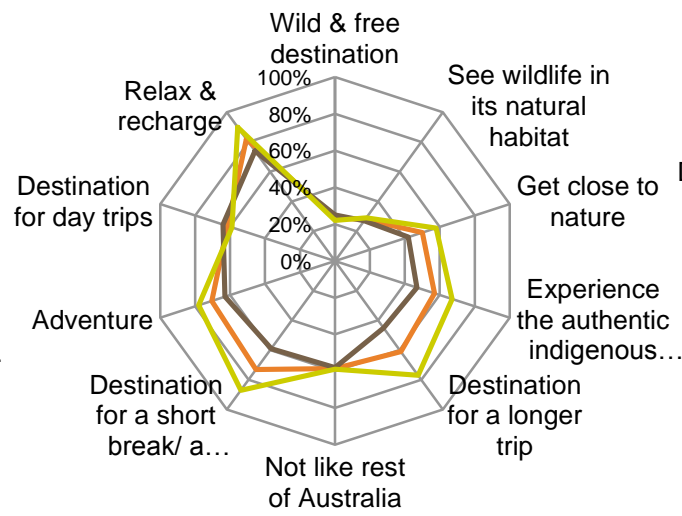
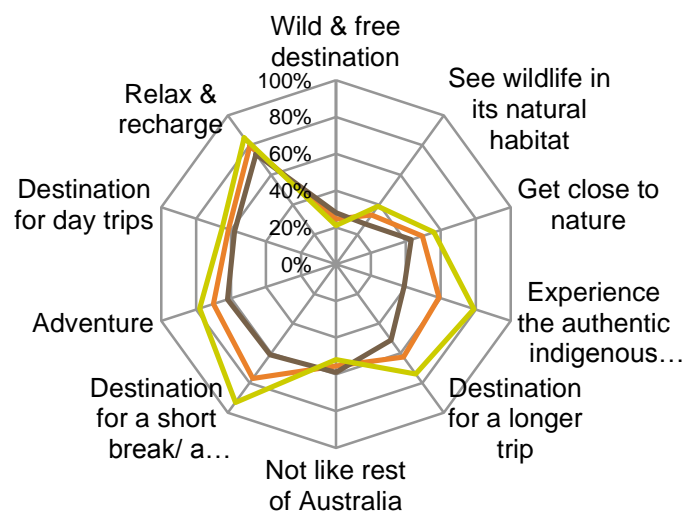
Perceptions of Darwin as a leisure holiday destination (cut by visitor group)

Similar impressions of Darwin among all visitor types

Darwin only visitors

Day trip visitors

Overnight visitors



— Total — Wave 1 — Wave 2



Source: Q18. I'd now like you to indicate which of the following elements you associate the Darwin and the Top End region as offering as a leisure holiday destination
Base: All respondents n=302 each wave

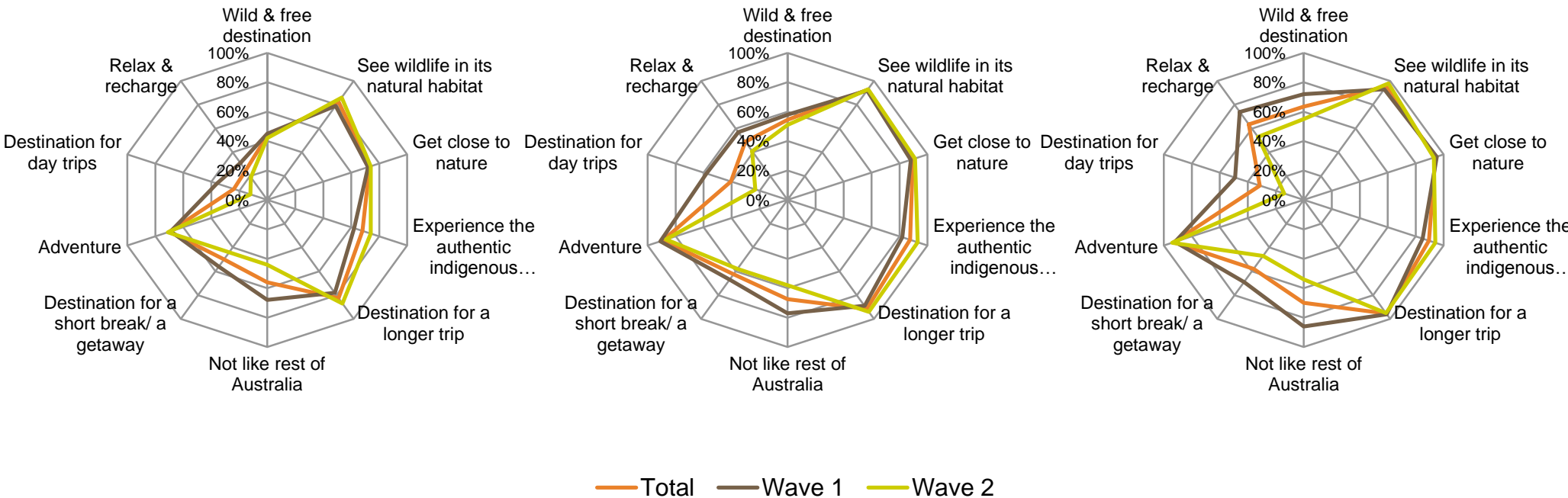
Perceptions of Top End as a leisure holiday destination (cut by visitor group)

Significantly stronger perceptions of the Top End among overnight and day trip visitors, reflecting higher levels of knowledge

Darwin only visitors

Day trip visitors

Overnight visitors



Source: Q18. I'd now like you to indicate which of the following elements you associate the Darwin and the Top End region as offering as a leisure holiday destination
Base: All respondents n=302 each wave

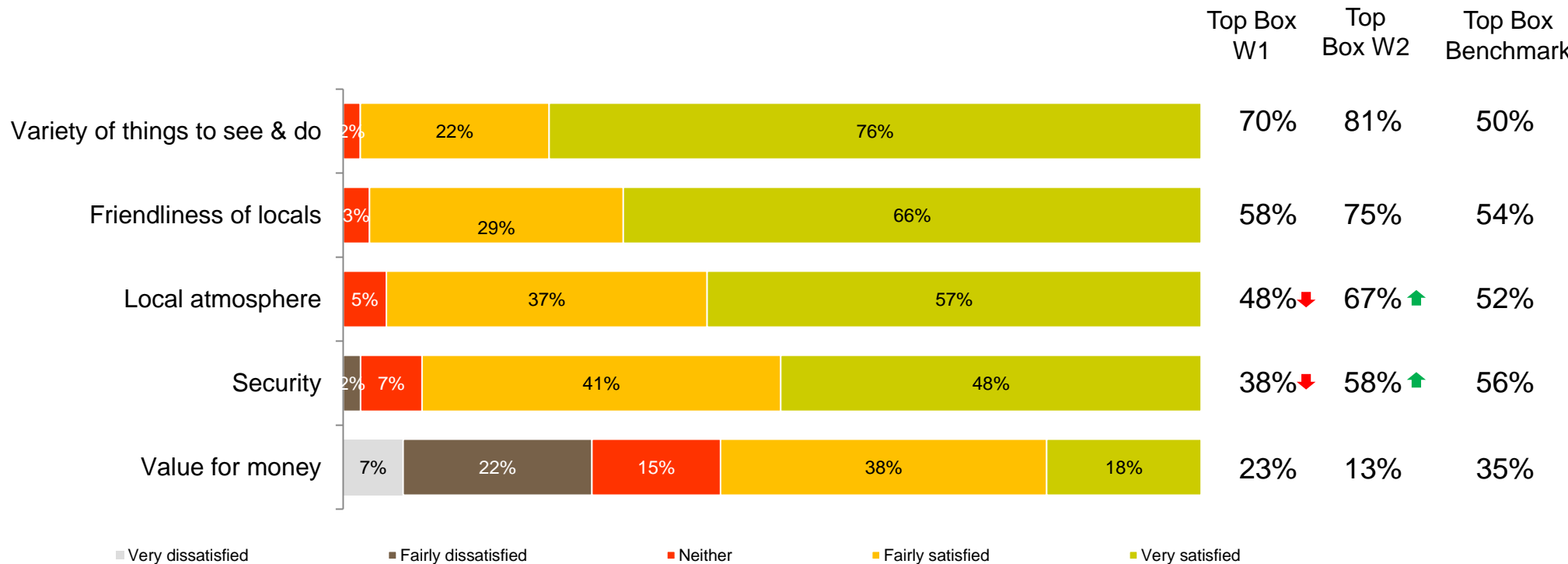
Satisfaction, recommendation and likelihood to re-visit

Darwin skyline



Experience of Darwin (Total)

Generally very high ratings for Darwin, with over two thirds of respondents very satisfied with the variety of things to do Darwin –the highest rated experience



Those who are satisfied with value for money tend to be Australian, Female, No children

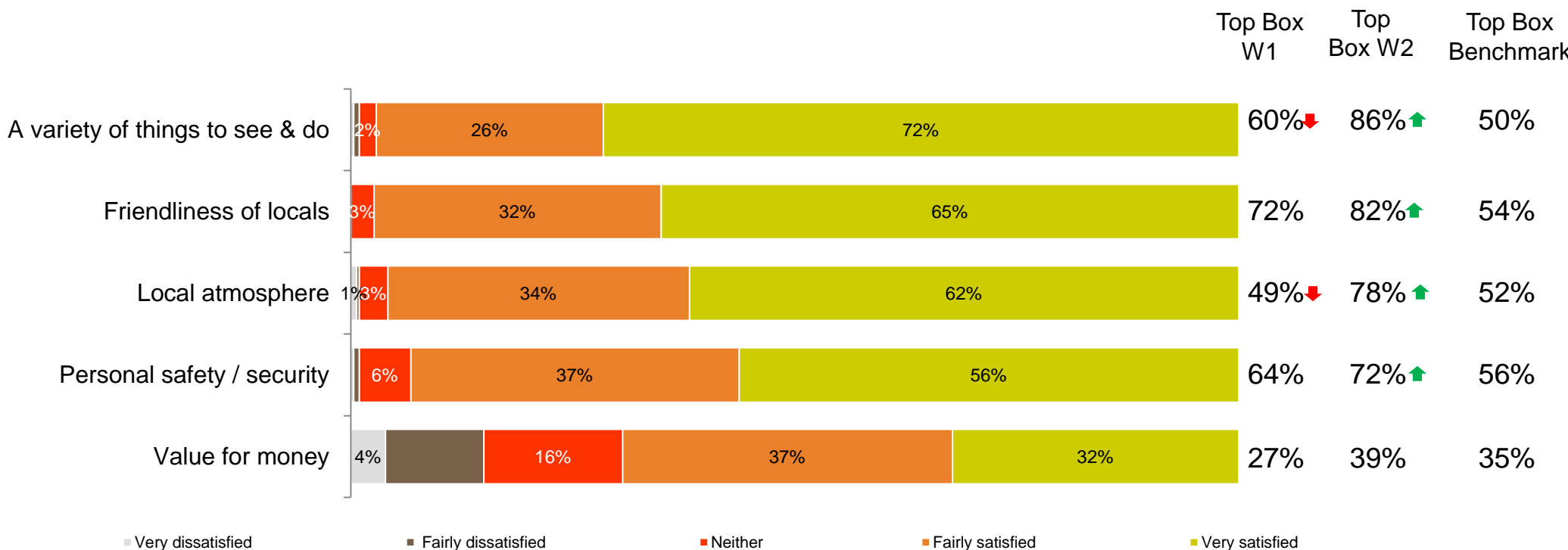
Repeat visitors are more satisfied with their experiences of Darwin than first time visitors

↑ Significantly higher against previous wave
↓ Significantly lower against previous wave

Source: Q19a. How satisfied or dissatisfied are you with your experience of Darwin City?
Base: All respondents n=604

Experience of Top End and surroundings around Darwin (Total)

High satisfaction with the variety of things to do in the Top End region
Ratings are generally similar, but higher than the VPS study, with the exception of value for money



Those who are satisfied with value for money
tend to be Australian, Female

↑ Significantly higher against previous wave
↓ Significantly lower against previous wave

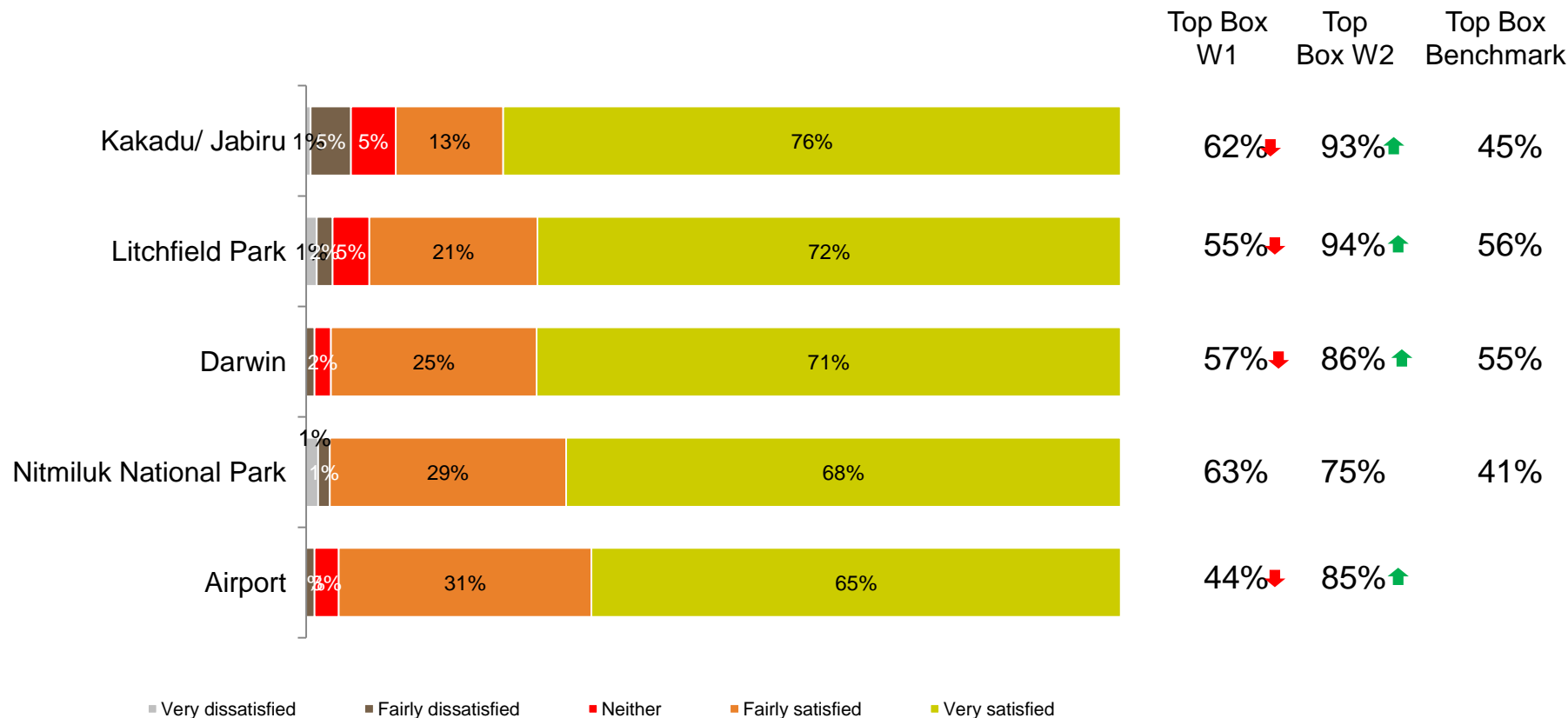
Source: Q19b. How satisfied or dissatisfied are you with your experience of the Top End region?

Base: All respondents who are taking day or overnight trips to Top End region or other parts n=604

Not applicable excluded (value for money n=307, personal safety n=311, local atmosphere n=312, friendliness of locals n=306, variety of things to see & do n=313)

Overall satisfaction with experience of Darwin & The Top End region (Total)

Overall satisfaction with Kakadu and Litchfield is significantly higher in peak season

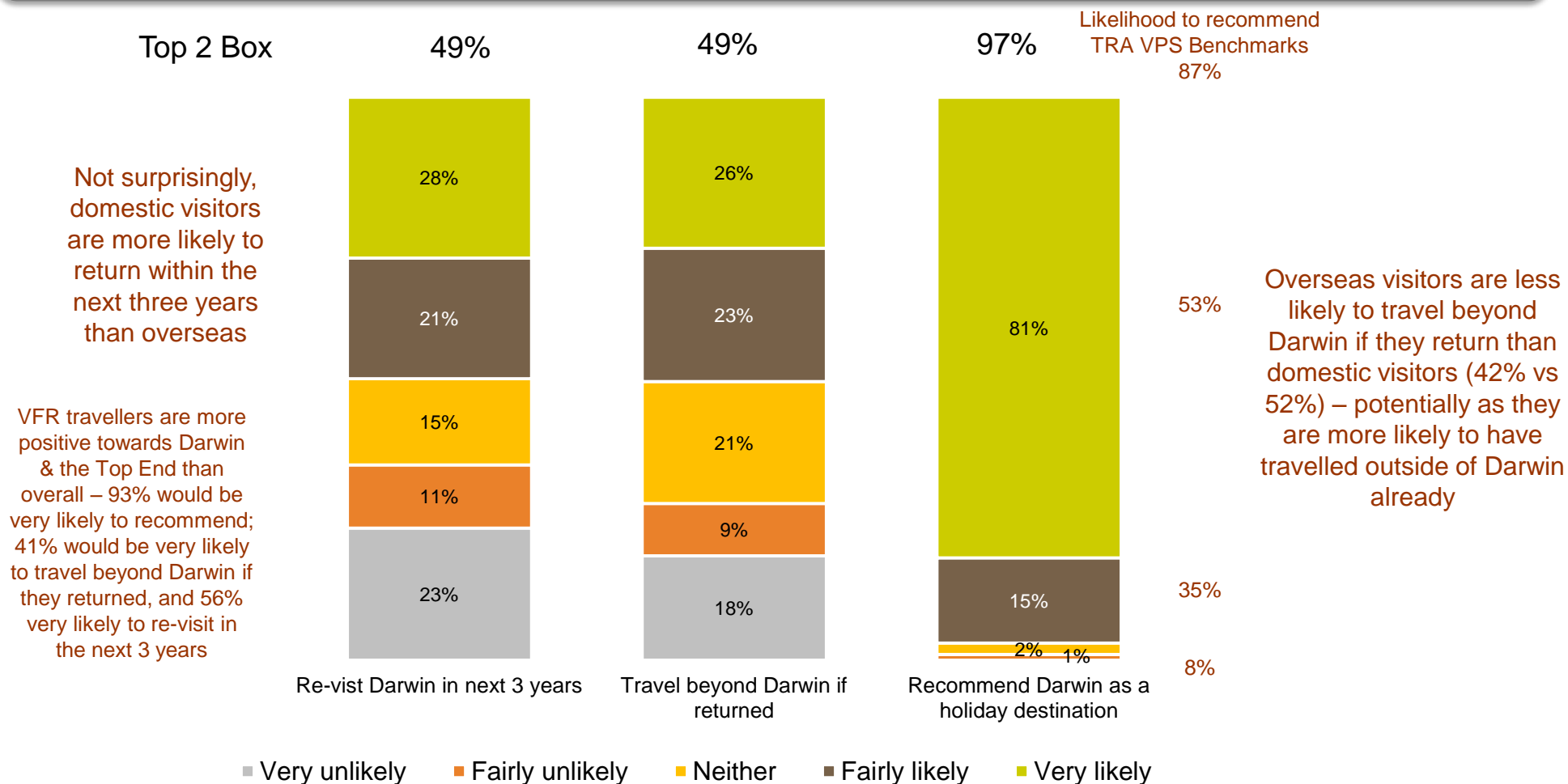


Source: Q14b. Overall, how satisfied or dissatisfied were you with your experience of the Top End (excluding Darwin)?
 Base: All respondents who visited destinations within the Top End region, Litchfield Park n=155 Kakadu/ Jabiru n=182, Nitmiluk National Park n=69. Not applicable excluded

↑ Significantly higher against previous wave
 ↓ Significantly lower against previous wave

Affinity towards Darwin (Total)

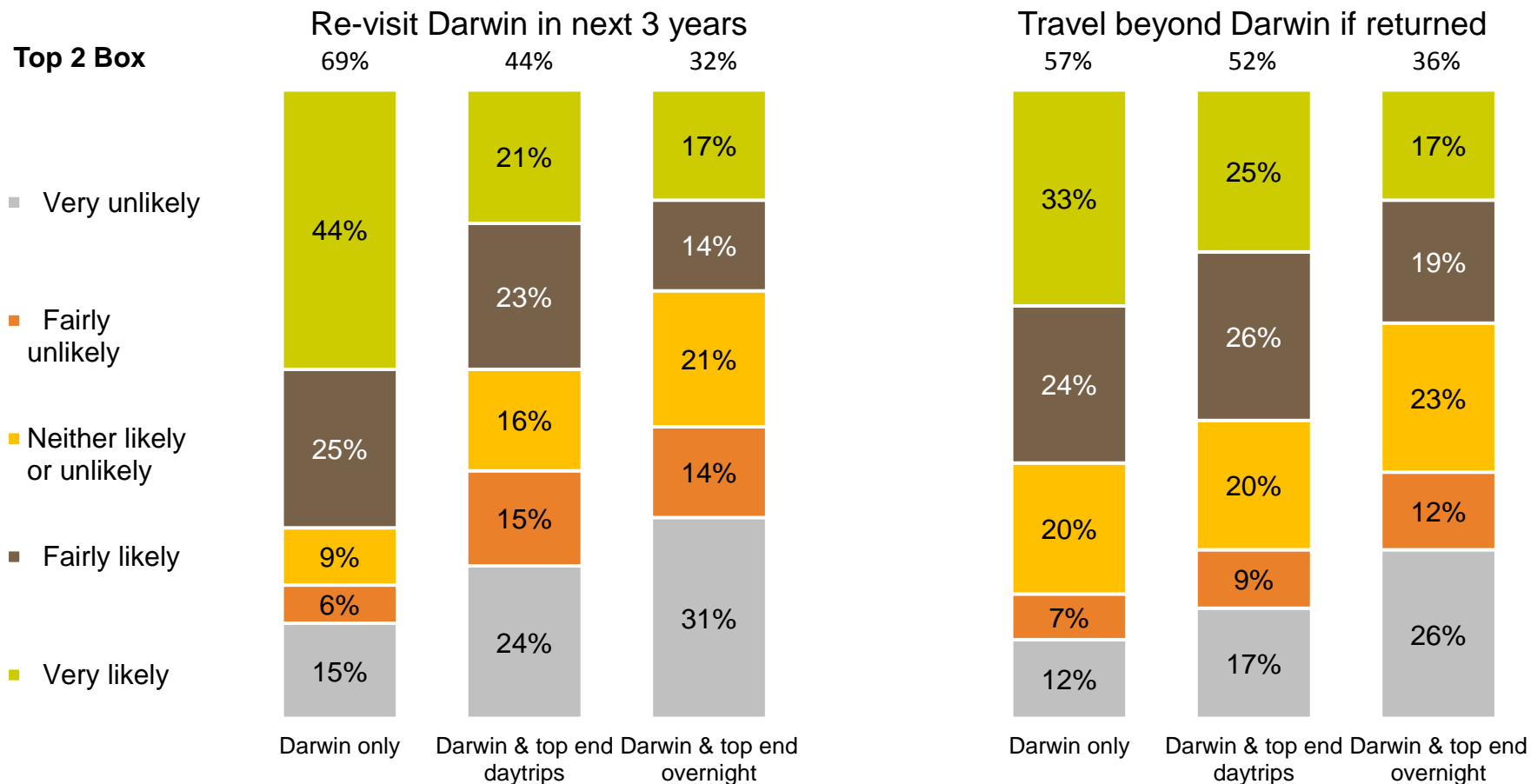
Although 97% would recommend Darwin, just under half are likely to return in the next 3 years or travel beyond Darwin – there is a need to communicate the ease of going beyond Darwin & the benefits such as seeing nature in its natural habitat. New news and events are key to encourage repeat visitation



Source: Q23/ Q24/ Q25. Overall how likely do you think you would be to re-visit Darwin, **in the next 3 years/** travel beyond Darwin if you returned to the area / recommend Darwin as a holiday destination to your friends or family, where 1 is very unlikely and 5 is very likely? Base: All respondents n=604

Affinity towards Darwin (Total)

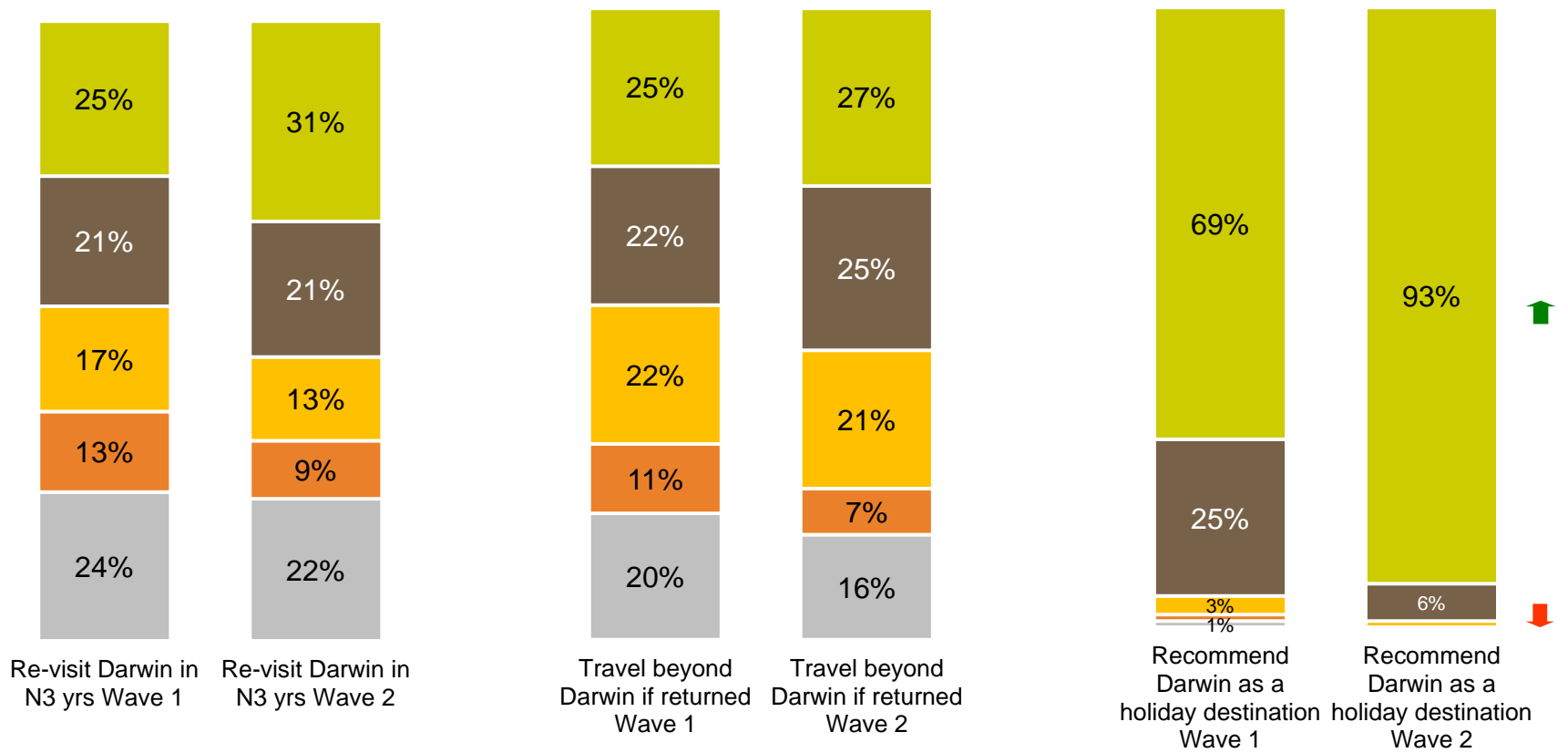
Those that came to Darwin only & did not disperse are more likely to re-visit in the next 3 years and are most likely to travel beyond Darwin next time



Source: Q23/ Q24. Overall how likely do you think you would be to re-visit Darwin, **in the next 3 years/** travel beyond Darwin if you returned to the
 Base: Darwin only n=212, Darwin & TE daytrips n=212, Darwin & TE overnight n=180

Affinity towards Darwin (Wave 1 vs. Wave 2)

Recommendation levels and likelihood to re-visit are highest in peak season. New news and events are key to encourage repeat visitation



Very unlikely Fairly unlikely Neither Fairly likely Very likely

Significantly higher against previous wave
Significantly lower against previous wave

Source: Q23/ Q24/ Q25. Overall how likely do you think you would be to re-visit Darwin, **in the next 3 years**/ travel beyond Darwin if you returned to the area / recommend Darwin as a holiday destination to your friends or family, where 1 is very unlikely and 5 is very likely?

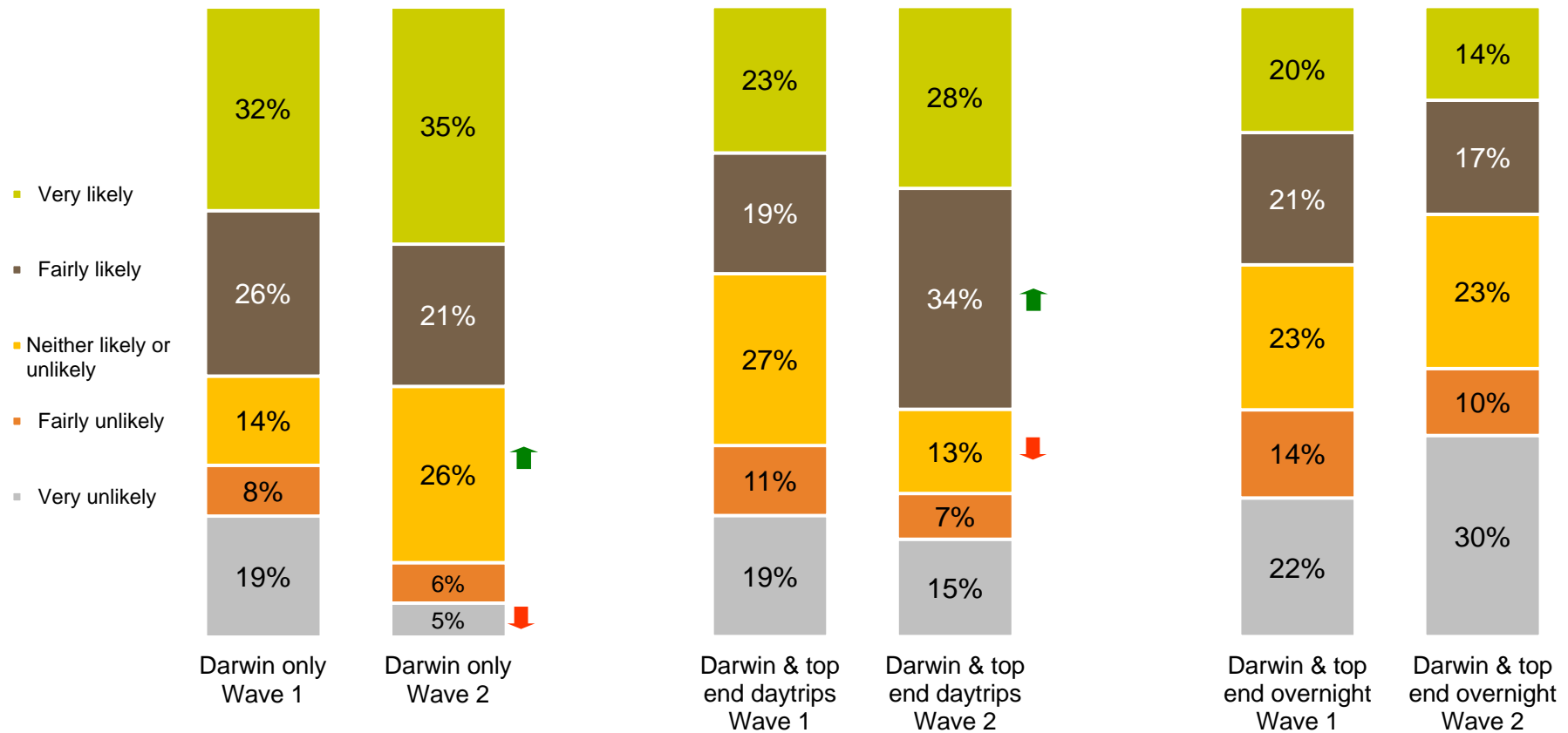
Base: All respondents n=302

Significantly higher result compared to previous Wave (95% confidence)

Significant lower result compared to previous Wave (95% confidence)

Affinity towards Darwin (travel beyond if returned)

Those that came to Darwin only & did not disperse are more likely to re-visit in the next 3 years and are most likely to travel beyond Darwin next time

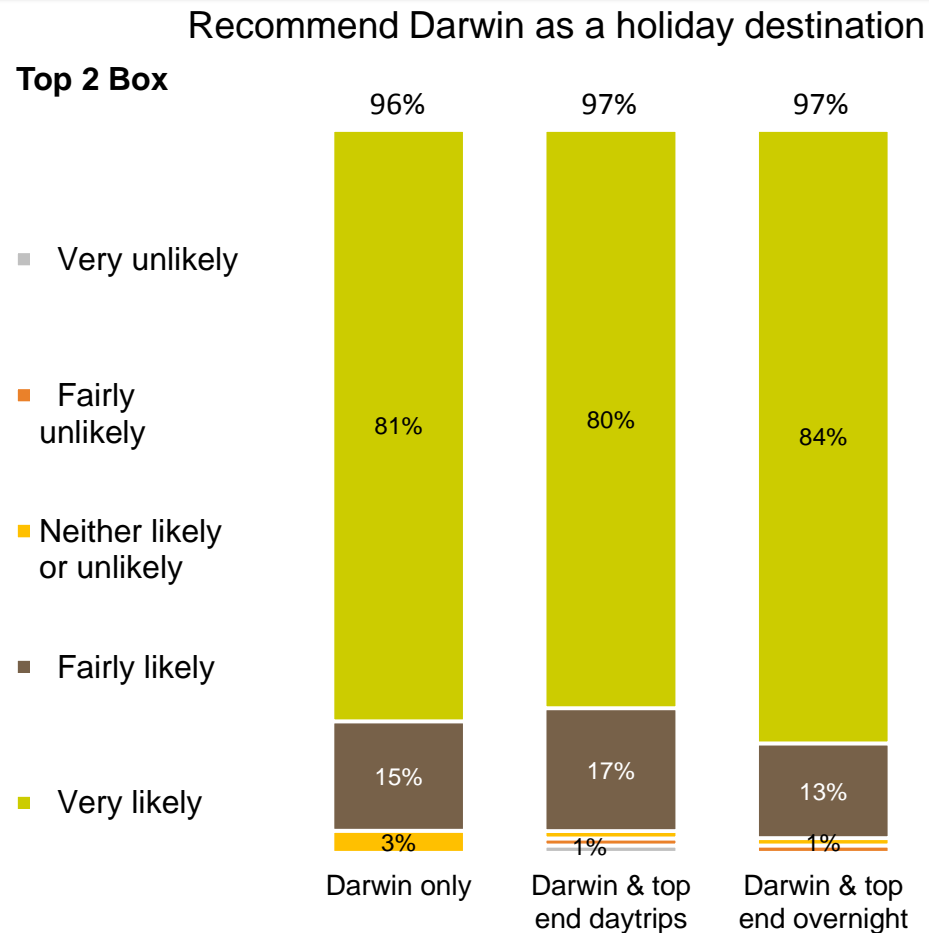


Significantly higher against previous wave
 Significantly lower against previous wave

Source: Q23/ Q24. Overall how likely do you think you would be to re-visit Darwin, **in the next 3 years/** travel beyond Darwin if you returned to the
 Base: All respondents n=302 each wave

Affinity towards Darwin (Total)

Recommendation levels for Darwin are similar across all three dispersal groups



Source: Q25. Recommend Darwin as a holiday destination to your friends or family, where 1 is very unlikely and 5 is very likely?
Base: All respondents n=604

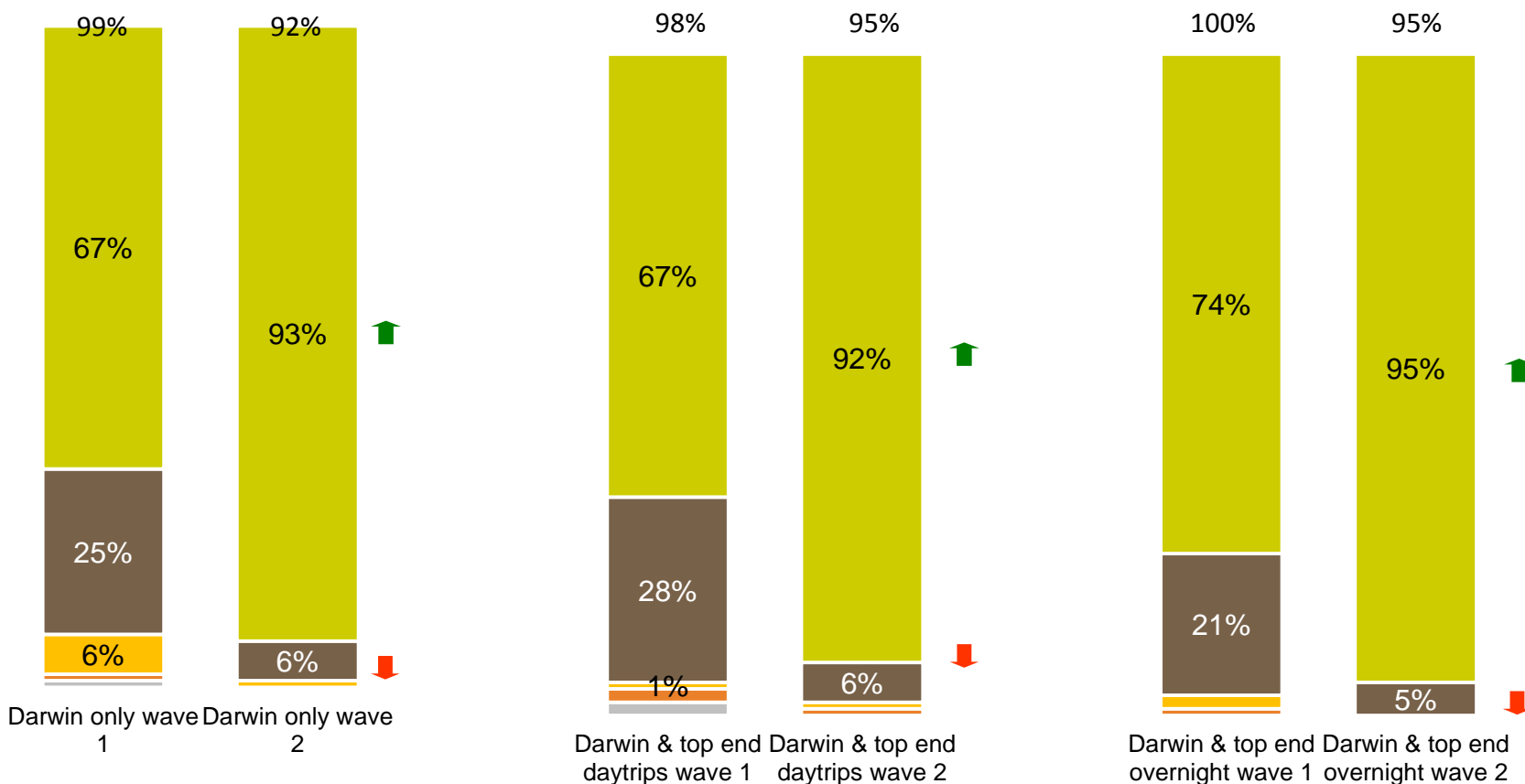
Affinity towards Darwin (Shoulder vs. Peak)

Recommendation levels are highest among those visiting in peak season across all sub-groups.

Recommend Darwin as a holiday destination

Top 2 Box

- Very unlikely
- Fairly unlikely
- Neither likely or unlikely
- Fairly likely
- Very likely



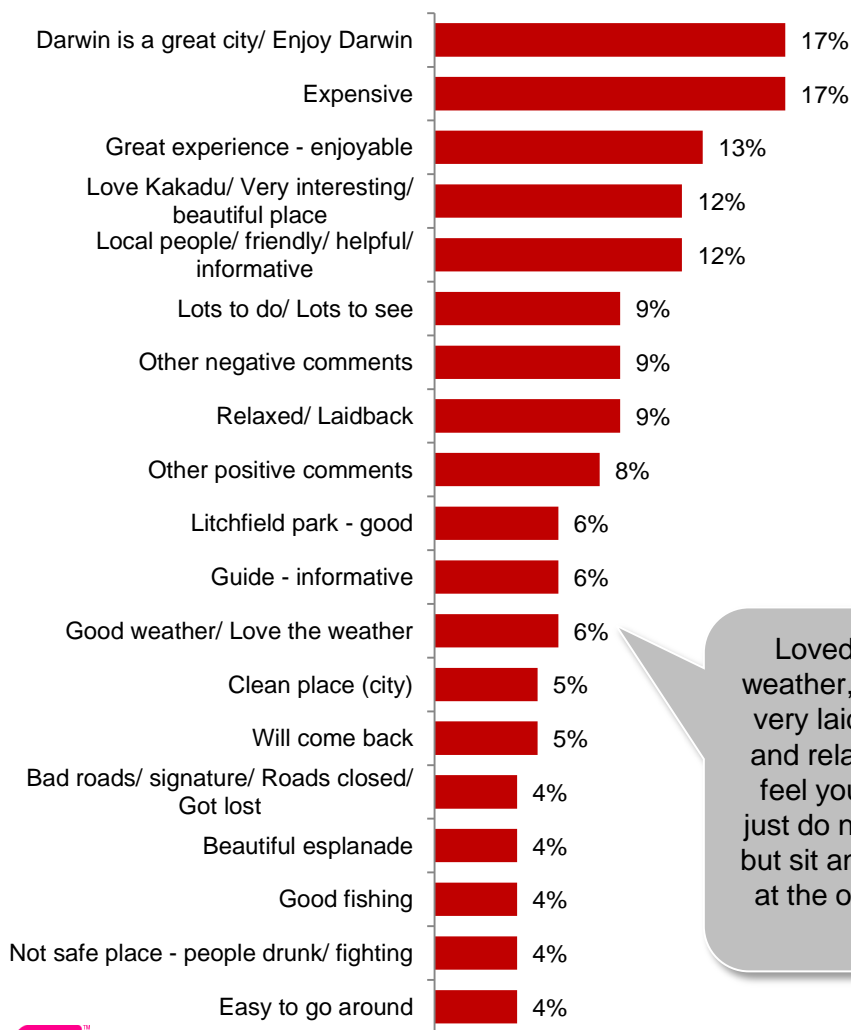
↑ Significantly higher against previous wave
↓ Significantly lower against previous wave

Source: Q25. Recommend Darwin as a holiday destination to your friends or family, where 1 is very unlikely and 5 is very likely?

Base: All respondents n=302

Feedback about the trip

Feedback is mostly positive around the trip, although there is a feeling that it is expensive



Darwin is just a great place to relax

Cost of living is very high and prices to get to things was a bit pricey for a family

Kakadu is just amazing. Loved the sunsets and eating in the wild, tried crocodile and witchery grubs were yummy

Loved the weather, it was very laidback and relaxed. I feel you can just do nothing but sit and look at the ocean.

Kakadu was a wonderful & enjoyable experience guide was knowledgeable. Darwin at night is more for young people, very loud and busy

Conclusions

Crocodile



IMAGE COURTESY OF TOURISM NT



What have we learnt that will help DRET & Tourism NT grow visitor dispersal within the Top End

Insight

Those dispersing beyond Darwin are significantly less likely to have children than those staying in Darwin

Domestic travellers dominate those visiting Darwin only, with VFR a primary motivation for two-fifths of these visitors.



Implication

The presence of children may be contributing to lower levels of dispersal, particularly if families are not clear around the options available to them

Those travelling further afield in the region tend to be older (may have fewer time restrictions). How can younger visitors be persuaded to travel more widely in the region?



Action

The marketing of family friendly overnight trips may help to encourage dispersion amongst those with children

Inspire hosts with information about what to do with visitors – give them ideas for itineraries and remind them how easy it is to visit places such as Kakadu

What have we learnt that will help DRET & Tourism NT grow visitor dispersal within the Top End

Insight

Kakadu & Litchfield are the primary drawcards that visitors disperse to, although Litchfield is more of a day trip destination

Darwin is seen as a low energy / relaxing destination, particularly in shoulder season

Wildlife and crocodiles are a key reason for wanting to disperse beyond Darwin

Implication

Kakadu & Litchfield remain important places to communicate to potential visitors and local VFR hosts

Different motivations & emotions are in play with regard to dispersal – these should be acknowledged in communications

Action

Prior to travel, messages around “inspiration” and “learning” can be used to encourage travel – such as suggested itineraries, imagery used

For those in Darwin only, messages should be around their next trip – and the ability to connect with loved ones, be that low energy in Darwin, or further afield to eg. see crocodiles in the wild so as to encourage dispersal next time



What have we learnt that will help DRET & Tourism NT grow visitor dispersal within the Top End

Insight

A key motivation for coming to Darwin & the Top End is to visit Kakadu park.

Visiting friends & family is also a large motivator across both the peak & shoulder seasons



Implication

Kakadu is a destination which could be used to encourage future visitation / dispersal beyond Darwin

Visiting friends & relatives should be used as an opportunity, rather than it being used as a barrier to dispersal



Action

Empower hosts with information about what to do with visitors – give them ideas for itineraries and remind them how easy it is to visit places such as Kakadu

Generate word of mouth discussions around what is possible eg. “Take more time for Kakadu”

What have we learnt that will help DRET & Tourism NT grow visitor dispersal within the Top End

Insight

Visitors are doing quite a lot – there is high awareness around what they can do.

Some activities, such as eating out at restaurants are done all year round. Shopping is more of a shoulder season activity, whereas outdoor activities such as the Waterfront & Mindil beach markets are frequented more often in the peak season



Implication

The challenge is not around visitors not doing things.

Some activities are seasonal, but there may be an opportunity to enjoy them in both peak & shoulder season – visitors must be educated about what is on offer



Action

Consider the development of a “What’s On” Calendar / suggest an itinerary for visitors – give clear information about what is open / happening in both shoulder & peak – and communicate it to eg hotel staff

Provide shelter & indoor attractions beyond Darwin – ability to have amazing outdoor experiences, but also provide respite from the heat & a reason to venture out

What have we learnt that will help DRET & Tourism NT grow visitor dispersal within the Top End

Insight

Top box satisfaction for those dispersing to Kakadu is higher than those staying in Darwin

Peak season visitors are more likely to recommend & re-visit, with those visiting Darwin only most likely to travel beyond Darwin on a return trip

Implication

Those that do disperse to Kakadu have high levels of satisfaction, but many day trip visitors find the distances involved to be greater than expected – which could impact on word of mouth recommendations

Action

Must clearly communicate the benefits of an overnight stay to Kakadu – this would increase dispersal levels and also provide further opportunity for positive word of mouth recommendations



What have we learnt that will help DRET & Tourism NT grow visitor dispersal within the Top End

Insight

Not having the time to go elsewhere is stated as a key barrier to dispersal, particularly in the shoulder season – visiting friends & family is a barrier throughout the year, but more so in peak season.

Visitors are more likely to cite booking accommodation in advance as a reason for not dispersing overnight in the peak season

Implication

Having pre-booked accommodation can impact on dispersal beyond Darwin.

Visiting friends & relatives is an important reason for visiting - . provide local residents with information, ideas and events – reasons to keep visiting other Top End destinations will help to encourage dispersal

Action

Promoting packages which include tours & accommodation in Darwin & surrounds would be beneficial, as well as raising awareness of tours available at the holiday planning / booking stage – opportunity to influence earlier in the decision making process.

Educate potential visitors with how easy it is to go beyond Darwin & to provide hosts with ideas to take their visitors to other destinations within the Top End – provide inspiration of how they can spend time together further afield



Recommendations

- Darwin as a unique destination presents the opportunity for visitors to relax and recharge, enjoy the variety of things on offer in the city and serves as an introduction to the Top End. Visitors to the Top End who stay in Darwin the whole trip are the most likely to revisit and the most likely to disperse next time they visit.
- With two fifths of those visiting only Darwin motivated by visiting friends and relatives across both the peak and shoulder seasons, opportunity exists to encourage visitors to disperse through the influence of local residents. These hosts should be empowered and inspired in the form of being provided ideas for itineraries or a reminder of how easy it is to visit places such as Kakadu National Park overnight.
- While Litchfield is suitable and popular as a day trip destination, visitors should be encouraged to take overnight trips to destinations further afield, including Kakadu NP and Nitmiluk NP, to maximise their experience, increase satisfaction and amplify the positive word of mouth. Clearly communicating the benefits of an overnight stay is fundamental, including the relaxing benefits of not being in transit for much of the trip.

Recommendations

- As eight out of ten visitors pre-book accommodation prior to arrival, a larger proportion of visitors are locked into taking day trips from Darwin before arriving in the Territory. Communicating the benefits of going on an overnight trip to regional destinations in the Top End early in the planning process and prior to booking accommodation is essential to increase overnight dispersal from Darwin.
- Travel websites and travel agents are key information sources at the planning stage of the decision-making process. Ensure that information on which destinations are suitable for a day trips, and which require an overnight stay for the full benefits to be realised is easily seen on tourism websites, as well as building travel agents' knowledge to include an allowance for overnight tours when accommodation is booked pre-departure.
- Raising awareness of what is on offer and what is open throughout the region during the shoulder and peak seasons is crucial to assisting visitors to plan their trip effectively. This communication should happen prior to arrival through to their actual stay in Darwin. The "What's On" Calendar would be a good medium to communicate this information, as well as suggesting itineraries for visitors depending on the time they have available, for example 'seeing the Top End in 4 days/ 6 days/ 8 days'.
- Communicating the unique attributes of dispersing in the shoulder seasons is essential to overcome the perception that overnight tours during this time provide a lesser experience due to limited access and therefore lesser value. Furthermore, by providing shelter in the regional destinations in the Top End, the visitors are given the ability to have amazing outdoor experiences, but are also provided respite from the heat and a reason to disperse during the warmer months of the shoulder periods.

Appendix: qualitative interview summaries



Case Study 1: Glenda, Darwin Only

- Glenda is 67 and lives in Tasmania with her husband; both are retired
- They wanted a no-driving holiday: The couple plan to do at least a month of caravanning a year, but due to Robert's recent hip replacement they didn't want to drive this year
- Darwin – because it was somewhere they hadn't been before and they liked the idea of taking the Ghan
- They flew to Darwin and returned by Ghan, stopping for a few days at Alice Springs to visit family (this was a benefit of the trip, not a driver); in the event, they were actually able to have a brief stop at Katherine too
- Staying in Darwin only and not taking trips beyond was a conscious decision – they plan to return to Darwin in the future with their caravan and will do the further afield trips then, so focussed this visit on activities that did not require a car (and which they will not do next time). They enjoying spending time in and wandering round new places and taking photographs (they enter club competitions) so walking was definitely on their agenda
- They booked their flights, Ghan travel, and accommodation through their local travel agent
- They had a few things in mind that they wanted to do in during their trip, but didn't plan their activities in detail. They found their activities through brochures collected in the hotel lobby and as they walked around. They did not visit a tourist bureau
 - *“We stumbled across the fish feeding and really enjoyed it”*
 - *“We took a book each but didn't read them!”*
- Katherine a spontaneous decision – it was a decision made on the train after leaving Darwin. They chose to see the river and rock art, and were pleased to have had an “excellent guide” which they felt was very important to the experience

“When we got back, people said to me ‘Was it exciting?’ and I said ‘No. It was fantastic!’ (Glenda, Darwin Only Visitor)

Case Study 2: Zoe, VFR and daytripping to Litchfield independently (with her hosts)

- Zoe is 33 and lives in WA. She is an avid traveller – *“I want to leave every two months!”* – and already has her next two trips planned: Bali in November for 7 days, with friends (\$230 return for flights); and Japan in February for 2 weeks of skiing. She is an outdoors person, enjoying hiking and spending time in nature.
- A friend of hers had moved to Darwin at the beginning of the year, and wasn't very well so this trip was taken, using unpaid leave, to enable Zoe to visit
- Darwin – was not on her radar at this stage as she prioritises overseas travel. VFR was therefore the driver of this trip. Darwin has always been somewhere she has wanted to visit, but imagined this would be when she had retired at 50 and was making a trip in a campervan trip around Australia with her husband (although she admits she has no idea how she will be able to retire at 50 and where she will find a husband!
- The daytrip was made with her friend and the family – to Litchfield as this is where the father works, so they travelled down on his journey to work and back when he was going home.
 - Pleased she did this with people who knew the area as signage prior to arrival was poor
- Many of the organised trips did not appeal to her – *“I don't want to spend an hour looking at termite mounds!”*
- Conscious decision not to take a daytrip to Kakadu – *“Too far for a day... Not worth it. I don't want to be put off... will do it properly next time... I like to do things properly”*. When she does visit Kakadu, it will be an independent trip to give her more flexibility than an organised tour allows
- She would have loved to have done an overnight trip. She looked into this for this trip and found a trip she really wanted to do, but her timings didn't allow for it
 - The trip departed twice a week, and this clashed with the flights she had already booked
 - 3 days away was too long on a 5 day trip where the purpose was to see a friend and the friend wouldn't have been doing the activity
 - She also noted that the two departures that almost worked were both fully booked by the time she found them
 - NEXT TIME she would check out timings (time of year; suit friend; availability of tour) and then book her flights

“If I'd known about the kayaking trip before I had booked my flights I would have booked for 8 days instead of 5.” (Zoe, VFR, Daytrip)

Case Study 3: Julie, Daytripping to Kakadu and Litchfield

- Julie is 58 years old and lives in Country Victoria with her husband; 3 children are grown up and have flown the nest. They enjoy travelling and are able to do quite a lot of this - she works part-time, 3 days a week, which can enable her to take 10-11 days very economically, and her husband owns his own business. They mix up domestic and international travel.
- Darwin – because they hadn’t been there before, it was warm, and they had had good feedback from family friends who had been. On this occasion, it was a choice between an island (probably Hayman), Fiji, Broome and Darwin; constant weather, ease of getting there (direct flight), being a capital city they hadn’t been to yet, and the cost of Broome, led to Darwin being selected.
- From the trip, they wanted to have relaxation (e.g. sitting by the pool with a good book; nice dinners) and to do lots of walking (they expected Darwin to be easy to walk around – and it was). Consequently they planned to hire a car for the last 4 days of their trip only, giving the first week to explore on foot.
- They spend their time doing a number of activities: museum, walking around the city, crocodiles, the beach/ wave pool, sitting by the pool, deck chair cinema, watching sunsets... and 2 day trips
- Kakadu was a must – “*We had to go and see it... we’d heard about Kakadu but hadn’t seen it*”.. They went on an organised trip with AAT Kings which they booked when they were in Darwin, at their hotel. The receptionist had recommended AAT Kings over other operators because she had been herself and enjoyed, pick up was from the door and the price was comparable. However, they found the trip “*disappointing – lots of time on the coach, lots of stops and drops, and didn’t really cater for us*”. Having booked their accommodation before their trip meant they couldn’t be flexible on this occasion with overnight trips. Whilst they acknowledged a daytrip wasn’t ideal for seeing Kakadu, they didn’t feel that they had much choice in the circumstances – “*we’d be embarrassed to come home without doing the highlights*”. On reflection, she would prefer to visit Kakadu on a self-drive, overnight trip
 - She felt they hadn’t done enough research; but it is worth noting that friends and family didn’t give any advice on timings, perhaps because they’d had brief stays themselves
- Litchfield was visited independently – being closer than Kakadu, and seemingly easier and more straightforward, they felt they could do this independently, especially having spoken to people who had done so. This also meant they could “*please ourselves, stop as we like, go swimming it we like*”
- She felt that they missed out on Katherine – this could have been fitted in in the time they had available, but they were unable to do this because they had pre-booked all of their accommodation in Darwin and so were not able to go away overnight.
- As it turned out, the highlights of the trip were the restaurants, the sunsets, and the deckchair cinema.

“We hadn’t done enough research beforehand” (Julie, Daytrips)

Case Study 4: Belinda, Daytripping to Kakadu, Litchfield and Katherine

- Belinda is 56 years old, lives with her husband and has been retired for 2 years now. With her husband also retired, they like to do as much travelling as possible – this has involved a few cruises, including in Canada and Alaska, a trip to England and to Europe. However, her husband is now unwell, with cancer, and this means their focus is now on Australia, with Tasmania, Queensland being ticked off so far.
- Darwin – because they hadn't yet been to Darwin, and because the tour that they were originally looking at, of Darwin-Broome tour, involved staying in tents for much of the duration, which didn't really appeal.
 - *"We are working our way through out Bucket List"*
- She was unsure of what to expect – they had heard good things about Darwin, "rave reviews". Thought it would be laid back and relaxed.
- The trip – flights, accommodation, and tours – was booked through their regular travel agent – *"she knows what we want"*
- They pre-booked for 3 daytrips with APT – one to Kakadu, one to Litchfield, and one to Katherine Gorge. They spread these over the 10 days that they had to allow them to rest in between, which was particularly important for her husband.
- They hadn't wanted to do an overnight trip because her husband gets very tired... But on reflection she believes it could have been good to do an overnight trip, especially if this linked two or more of the destinations:
 - Allow them to see more of the area – *"it's such a long way to get out there"* .
 - Made the days shorter and given her husband more time to rest
 - See different wildlife at night in the bush compared to what would be seen during the day
- But it was only after the fact that they thought about this.
- They did a number of activities on their *"days off"* including visiting Fannie Bay, Mindil markets, Callum Bay, the Casino, 'underwater thing' at the wharf – *"fantastic... "totally different – and crocosaurus cover – "fantastic!... We were filling in time before our flight and thought we'd spend an hour or two there, but instead we spent 4 hours there!"*. The information for these ideas came from brochures picked up at the hotel, sorting through the brochures physically to decide what to do and then prioritise
- The trip overall exceeded her expectations. Darwin was *"great!"* – it felt safe both in the day and at night; there was no rushing; and there was not the hassle and rush of other people that they had found in other cities.
- She thought 10 days would be a lot of time, especially with only three days-worth of activities booked, but she could have had more time there
- The disappointment was not being able to find a day cruise for the harbour; the places that she rang and enquired at did not have availability on the dates sought. She would also not have taken an outbound red-eye flight as rooms aren't available until later in the day anyway.

"There is just so much to see!" (Belinda, Daytrips)

Case Study 5: George, Daytrip to Kakadu, Litchfield and Katherine

- George is 64 years old and has been retired for several years. He and his wife aim to holiday twice a year. They have three holiday types: longer trips of 5-6 weeks to the UK to visit family and friends; trips of a few days when they do something more local, usually involving driving somewhere from their home in Wollongong; and finally “a week somewhere different... to get away”. A few years ago he concluded that instead of spending money overseas, they should start seeing more of Australia. Last year they went to Alice Springs and Ayers Rock (sic).
- Darwin – because it was somewhere they hadn’t been there before and it had the key ingredients he looks for in a holiday, had nice scenery and countryside, it had history (he is not a beach lover). It also helped that Darwin was warmer than Wollongong in the winter, and they wanted somewhere warmer for their break.
- From the trip, they wanted nice scenery, countryside and to not have to drive – *“I do enough driving anyway”*
- George did some research before making the booking, using brochures from his local travel agent and the internet for general information about Darwin. He booked everything through the travel agent (except travel insurance which he arranged himself).
- 3 day trips were booked at the same time as everything else. He had always wanted to go to Kakadu and Katherine Gorge, and had found some information on Litchfield. A discount was offered for booking three tours and so three tours were booked. Aware that these would be long days, he arranged them to have a day “off” in between each tour.
- Not wanting to have to keep packing and unpacking, and wanting instead to have a base, were the key barriers to booking an overnight tour. He admitted though that he had seen little information for overnight trips, although felt this could have been because he wasn’t really looking for this.
- On reflection he feels that it may have been better to do an overnight trip, because the days felt even longer than he expected. His ideal would be to be met at the airport and taken close to Kakadu as the start of an overnight tour using this spot rather than Darwin as a base, and then going on to Darwin afterwards.
- On the ‘days off’ he went to historical parts of Darwin, took an open-top bus trip, went on a sunset cruise and walked around the town and harbour front. The tourist bureau in Darwin was a key source of information; he expected this would be more centrally located than it was, but when there he felt the staff were good and helpful
- Highlights of the trip were not what he expected. The expectation was that the highlights would come from the day trips, but instead the highlight was the sunset cruise – *“very relaxing and very pleasant... The coach tours were quite tiring”*
- He felt that Darwin did not do enough to promote its activities, such as the WW2 and Cyclone Tracey museum; and that the city’s bus service should be promoted more to give easier access for visitors to travel around the city

*“I don’t know why the City Bus Service isn’t promoted more”
(George, Daytrips)*

Case Study 6: Jane, Overnighiting to Kakadu & Litchfield

- Jane is 55-64 years old, married and living in Central NSW. An empty nester, she is still working full time – her husband is currently off work due to injury.
- Their aim is to go to each capital city, see what it's like and if they want to go further. After their Darwin trip they now only have Melbourne left to do – then they are planning on going overseas and doing a European River cruise.
- Darwin – because it was the right time of year (they had been advised by family friends to not go in the wet season), and because they hadn't been there yet. They had 10-11 days there
 - *"I think you need at least 10 days in a city, especially without a National Park"*
 - *"We could have stayed longer, except for the costs"*
- They wanted to see Kakadu and Litchfield, having been inspired by travel shows, and wanted to do lots of walking; they also wanted to see crocodiles in the wild.
- They also wanted to make sure that they could see Darwin itself. They visited the historical part of town, the animal park, the foreshore, Mindil markets and did some shopping.
- Their bookings, including the tours, we made through an online travel agent - *"I always like to have one activity booked before we travel"*.
- It was only because they saw the overnight trip advertised on the travel agent website (i.e. point of booking) that this was built into their trip by the booking agent with regards to accommodation – *"we hadn't thought of it until we saw it there"*. Their trip was 4 days/ 3 nights, with two of the nights at Katherine and 1 at Kakadu; it was a small group with a total of 6 passengers. They were very satisfied with the tour, noting the *"bright, cheery guide"*, the fact that her celiac diet had been catered for specially by the guide – *"he even had a cappuccino mix for me!"* The only downside was that they had trouble finding an evening meal in Katherine on a Sunday night, and had they known this would have bought something from a supermarket instead.
- She would definitely return to Darwin, drawn back there by the friendly people and the climate. However, due to the cost of flights, and the fact that there are few offers on flight to/from Darwin are barriers to this. On a 'next time' she believes they would visit Kakadu and Litchfield independently – they saw lots of other people (including of their age group) camping and swimming in waterholes

"It's the friendliest city we have ever been to... We've told everyone they have to go!" (Jane, Overnighter)

Questionnaire

Yellow Water Billablong, Kakadu National Park



IMAGE COURTESY OF TOURISM NT





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Good morning/afternoon, my name is [INTERVIEWER NAME] and I'm from NFS on behalf of Tourism NT. We're talking to people visiting Darwin and beyond. Your responses will be really valuable to us and will be used to help improve services in the Darwin & Top End region. If you agree to participate, and you qualify, we'll ask you to complete a 10 minute survey, and will give you a souvenir.

Your answers will be totally confidential and will be used for market research purposes only. Would you be willing to help us with this study?

CHECK TO SEE NO ONE ELSE FROM IMMEDIATE FAMILY GROUP IS ALREADY PARTICIPATING- We can only have one survey per immediate travelling group (e.g. couple/ family).

SHOW CARD S1

S1 Are you a visitor to Darwin or do you live in Darwin / the Northern Territory? SR		
Yes - visiting for leisure	1	ASK S1b
Yes - visiting for business	2	TERMINATE
No - I live in Darwin / the NT	3	TERMINATE

S1b Are you in Darwin to compete or watch the Arafura Games? SR		
Yes	1	TERMINATE
No	2	ASK S2

SHOW CARD S2

S2 How did you travel to Darwin & how do you plan to leave? READ OUT. SR		
Flying in & out of Darwin	1	CONTINUE
Flew into Darwin & will leave by another mode of transport.....	2	CONTINUE
Flying out of Darwin but arrived by another mode of transport.....	3	CONTINUE
Driving in and out of Darwin	4	TERMINATE
Other	97	CONTINUE

SHOW MAR. & SHOW CARD S3

S3 Which of the following best describes your trip to Darwin and surrounds? READ OUT. SR		
Just visiting / staying in Darwin with no plans to travel to other areas in the Top End.....	1	Min n=75
Visiting / staying in Darwin as well as taking day trips to the Top End region	2	Min n=75
Visiting / staying in Darwin as well as travelling to other parts of the Top End region for overnight trips.....	3	Min n=75



SHOW CARD S4

S4 Which of the following statements best describes at what stage you are at in your trip in the Darwin region? SR		
At the beginning of my Darwin/ Top End trip (i.e. just arrived/ not seen much yet) ...	1	TERMINATE
In the middle of my Darwin/ Top End trip (i.e. have spent some time in/around Darwin)	2	CONTINUE
Towards the end of my Darwin/ Top End trip	3	CONTINUE

S5 Where do you usually live? SR		
Within Australia (but outside the NT)	1	Quota - Max n=210
Overseas / Internationally	2	Quota - Max n=90

INTERVIEWER: CHECK WITH RESPONDENT THAT THEY WILL BE COMFORTABLE COMPLETING THE SURVEY IN ENGLISH. OTHERWISE TERMINATE
RESPONDENTS NEED TO BE AGED 18 OR OVER - IF NOT SURE, PLEASE CHECK THEIR AGE AT THIS POINT.

This survey is about your time in Darwin and the Top End region.

INTERVIEWER PLEASE CIRCLE THE RELEVANT BOX OR WRITE IN THE RESPONSE WHEN REQUIRED

Q1 When you think of Darwin / The Top End region, what comes to mind? PROBE FULLY	

Q3 Was this the first time you had visited the Darwin / Top End region, including both day trips and overnight trips? SR	
Yes	1
No	2

Q4a How many nights have you / will you stay in Darwin during this trip? PLEASE WRITE IN NUMBER OF NIGHTS	
Number of nights.....	
None (no nights): day trip only.....	99

Q5b ONLY THOSE WHO ARE PLANNING TO VISIT REGIONS OUTSIDE OF DARWIN SHOULD ANSWER THIS (CODES 2 or 3 at S3) How many nights have you / will you stay in other destinations in the Top End during this trip excluding Darwin itself?	



PLEASE WRITE IN NUMBER OF NIGHTS	
Number of nights	
None (no nights), day trip only	99

Q7 What were your reasons for coming to the Darwin / Top End region? DO NOT READ OUT. MR	
Any other reasons?	
Have always wanted to visit Darwin	1
History of Darwin	2
The weather / to get away from the cold	3
Have been before and wanted to come back	4
Have always wanted to visit the Top End	5
On a tour / sightseeing	6
To visit friends or family living here	7
To visit Kakadu National Park	8
To visit Litchfield National Park	9
To learn more about Indigenous culture	10
To experience the tropics	11
To have an adventure	12
To do something different	13
To experience / get close to nature	14
A gateway to visit the national parks in the top end	15
A gateway to Asia	16
To visit Katherine	17
To visit Nitmiluk National Park (Katherine Gorge)	18
It was a convenient stop over point	19
On a tour / excursion	20
Sight seeing	(code 21)
For a holiday	(code 22)
Something else (please specify)	96



Q8 And what was your <u>main</u> reason for coming to Darwin/Top End Region? DO NOT READ OUT. SR	
Have always wanted to visit Darwin	1
History of Darwin	2
The weather / to get away from the cold	3
Have been before and wanted to come back	4
Have always wanted to visit the Top End	5
On a tour / sightseeing	6
To visit friends or family living here	7
To visit Kakadu National Park	8
To visit Litchfield National Park	9
To learn more about Indigenous culture	10
To experience the tropics	11
To have an adventure	12
To do something different	13
To experience / get close to nature	14
A gateway to visit the national parks in the top end	15
A gateway to Asia	16
To visit Katherine	17
To visit Nitmiluk National Park (Katherine Gorge)	18
It was a convenient stop over point	19
On a tour / excursion	(code 20)
Sight seeing	(code 21)
For a holiday	(code 22)
Something else (please specify)	96

Q9 Did you <u>plan</u> any parts of your itinerary for visiting the Darwin / Top End region prior to arriving? For example, parts of your itinerary beyond getting to/ arriving in the region. SR	
Yes	1
No	2

**SHOWCARD Q10**

Q10 Which of the following information sources helped you plan your trip to the Darwin and the Top End region? MR , Agg , others?	
Friends / Family	1
Work Colleagues	2
Magazines / Newspapers	3
Movies	4
Travel Agents	5
Television Programs	6
Books	7
Travel Guide Books	8
Websites about Australia (eg Tourism Australia)	9
Social Media (eg Twitter, Facebook)	10
Travel Social Media (eg Trip Advisor)	11
Tour companies (eg Adventure Tours Australia, AAT Kings)	12
None of the above	96

SHOWCARD Q11

Q11 ONLY ASK THIS QUESTION IF YES AT Q9: What, if any, elements of your time in and around Darwin did you book in advance? This may include things such as transport, tours, accommodation, or something purchased as part of a package MR	
Tour/ excursion tickets	1
Car hire (self-drive)	2
Car hire (chauffeured)	3
Entry tickets to a paid attraction	4
Accommodation	5
Onward transport - flights out of Darwin	6
Onward transport - coach/ train (if car please tick code 2 or 3 instead)	7
National park tickets	8
Day trip / excursion tickets	9
	10
Overnight Tour/ excursion tickets	



Nothing / did not book anything in advance	96
Something else (please specify here)	97

**SHOWCARD Q12**

Q12 **ONLY ASK THIS QUESTION IF DID NOT ANSWER "NOTHING / DID NOT BOOK ANYTHING IN ADVANCE IN Q11"**
 And how did you book these? MR

Website - direct with the supplier (eg tour/ attraction/ hotel).....	1
Website - other (e.g. through a travel agent / general site)	2
Email - direct with the supplier (e.g. tour/ attraction/ hotel)	3
Email - other (e.g. through a travel agent / general site).....	4
Telephone - direct with the supplier (eg tour/ attraction/ hotel).....	5
Telephone - through a travel agent	6
In person - direct with the supplier (eg tour/ attraction/ hotel).....	7
In person - through a travel agent / visitor information centre	8
Some other way (please specify here)	96

SHOWCARD Q13

Q13 And which destinations within the Top End are you planning to visit or have you visited on this trip? Please only include places that you have or will actually stop at.

READ OUT, MR

FOR EACH DESTINATION SAY: Did you stop there or are you planning to stop there during the day only or overnight?

	No plans to stop here	Stopped / Plan to stop during the day	Stopped / plan to stop overnight
Darwin	1	1	1
Litchfield Park	2	2	2
Kakadu/ Jabiru	3	3	3
Tiwi Islands	7	7	7
Nitmiluk National Park (Katherine Gorge)	11	11	11
Other destinations in the Top End	12	12	12

□

**SHOWCARD Q14**

PLEASE REFER BACK TO QUESTION Q13 FOR LIST OF AREAS VISITED

Q14 **FOR EACH AREA VISITED AT Q13 ASK (Otherwise skip to Q15a)**

a And what is or will be the main form of transport used to travel to these destinations? **READ OUT, MR**

	Private Vehicle	Rented / hired vehicle	Bus / Coach	Other
Around Darwin	1	1	1	1
Litchfield Park	2	2	2	2
Kakadu/ Jabiru	3	3	3	3
Tiwi Islands	7	7	7	7
Nitmiluk National Park (Katherine Gorge) ...	11	11	11	11
Other destinations in the Top End	12	12	12	12

SHOWCARD Q14b

PLEASE REFER BACK TO QUESTION Q13 FOR LIST OF AREAS VISITED.

Q14 **FOR EACH AREA VISITED AT Q13 ASK (Otherwise skip to Q15a):** Overall, how satisfied or dissatisfied were you with your experience of the Top End (excluding Darwin) where 1 is very dissatisfied and 5 is very satisfied **SR**

	Very dissatisfied	Fairly dissatisfied	Neither satisfied nor dissatisfied	Fairly satisfied	Very satisfied	Not applicable - no experience
Litchfield Park	1	2	3	4	5	97
Kakadu/ Jabiru	1	2	3	4	5	97
Tiwi Islands	1	2	3	4	5	97
Nitmiluk National Park (Katherine Gorge) ...	1	2	3	4	5	97

Q15a **IF VISITED ONLY DARWIN S3 (code 1),** And why did you decide to visit only Darwin...and not surrounding areas as well on this trip? **[DO NOT READ OUT, MR]** Any other reason?

Not enough time to go elsewhere	1
Been before	2
The Top End does not appeal to me	3
Came to see Darwin itself/ the city	4
Visiting friends & relatives - spent time with them instead	5
I had already booked accommodation so could not take overnight trips	6
I did not realise how much was on offer outside Darwin until I got here	7



There is enough to see and do in Darwin without needing to travel further	8
Hotels too expensive / not good value for money	9
Couldn't get the accommodation I wanted / booked out	10
Tours too expensive / not good value for money	11
Been to the Top End before & only wanted to visit Darwin this time	12
Other (specify)	96



Q15b IF VISITED OTHER DESTINATIONS ON A DAY TRIP BESIDE DARWIN S3 (code 2), ASK. And why did you decide to take a day tour rather than to stay in Darwin or go overnight? [DO NOT READ OUT, MR]	
Not enough time to go elsewhere	1
Been on an overnight trip before & wanted to stay more local to Darwin this time....	2
The Top End does not appeal to me	3
Visiting friends & relatives – spent time with them instead	5
I had already booked accommodation so could not take overnight trips	6
I did not realise how much was on offer outside Darwin until I got here	7
There is enough to see and do in Darwin & the local surrounds without needing to travel further	8
Only wanted to see the highlights	9
Takes too long to get there / too far to get to	10
Overnight Tours too expensive / not good value for money	11
People had recommended it	12
Seemed like the best mix in the time available	13
Heard it was not worth the effort to stay overnight	14
Did not want to camp in the bush	15
Other (specify)	96

Q16 IF VISITED OTHER DESTINATIONS OVERNIGHT BESIDE DARWIN S3 (code 3), ASK And what made you decide to travel beyond Darwin to some of the Top End on this trip? [DO NOT READ OUT, MR]	
Wanted to see the wildlife/ crocodiles in their natural habitat.....	1
See the landscape	2
See the rock paintings/ other indigenous culture	3
Like to explore the countryside/ get out of the city	4
Wanted to camp in the bush	5
People had recommended it.....	6
Always wanted to go	7
To go swimming in a waterhole / waterfalls	8
To do something unique	9
Go Fishing	10
Never been before	11
Other 1 (specify)	97
Other 2 (specify)	98
Other 3 (specify)	99

**SHOWCARD Q17**

Q17 And during your time in the Darwin and the Top End region, which of the following have you visited or done? **DO NOT READ OUT: MR, Mrs, others?**

Crocodylus Park (Berrimah)	1
Crocodylus Cove (Mitchell Street)	2
Darwin Botanic Gardens	3
Darwin Waterfront Precinct (Wavepool)	4
Harbour Cruise	5
Jumping Crocodile Cruise (Adelaide River)	6
Museum and Art Gallery of the Northern Territory	7
Scenic flight	8
A nature walk	9
Territory Wildlife Park (Berry Springs)	10
Mindil Beach Markets/ other markets	11
Go on a tour with an Indigenous guide	12
Fishing tour / charter	13
Visit an Indigenous cultural centre	14
Visit an Indigenous gallery	15
A Nature / bird watching tour	16
See an Indigenous dance or theatre performance	17
See an Indigenous site or Indigenous community	18
Swimming in a waterhole / waterfall	19
Shopping.....	20
Eating out at restaurants.....	21
Military Museum.....	22
Other.....	97
None of these	98

**SHOWCARD Q18**

Q18 I'd now like you to indicate which of the following elements you associate the Darwin and the Top End region as offering as a leisure holiday destination: **READ OUT EACH OPTION**

FOR EACH EXPERIENCE/'YES' ASK: And would you say that you associate it with Darwin, the area surrounding or both? **IF BOTH MULTICODE**

IF NO - CODE AS NEITHER

INTERVIEWER: 1, 2 ARE MULTICODE, 3 IS SINGLE CODE - MUST CIRCLE AT LEAST ONE CODE PER ROW

	Darwin	Area surrounding Darwin	Neither
A place where I can relax & recharge	1	2	3
A place where I can get close to nature	1	2	3
Not like the rest of Australia	1	2	3
A place where I can see wildlife in its natural habitat	1	2	3
A wild & free destination	1	2	3
A place where I can experience the authentic indigenous culture	1	2	3
A place of adventure	1	2	3
A destination for day trips	1	2	3
A destination for a short break/ a getaway (less than 3 days)	1	2	3
A destination for a longer trip (3 days or more)	1	2	3

SHOWCARD Q19a

Q19a I'd now like you to rate your experience of Darwin City where 1 is very dissatisfied and 5 is very satisfied. How satisfied or dissatisfied are you with... **SR - READ OUT EACH STATEMENT.**

	Very dissatisfied	Fairly dissatisfied	Neither satisfied nor dissatisfied	Fairly satisfied	Very satisfied	Not applicable - no experience
Value for money	1	2	3	4	5	97
Personal safety / security	1	2	3	4	5	97
Local atmosphere	1	2	3	4	5	97
Friendliness of locals	1	2	3	4	5	97
A variety of things to see & do	1	2	3	4	5	97

SHOWCARD Q19b**(FOR S3=2 or 3 only)**

Q19b I'd now like you to rate your experience of the Top End region where 1 is very dissatisfied and 5 is very satisfied. **SR – READ OUT EACH STATEMENT**

	Very dissatisfied	Fairly dissatisfied	Neither satisfied nor dissatisfied	Fairly satisfied	Very satisfied	Not applicable - no experience
Value for money	1	2	3	4	5	97
Personal safety / security	1	2	3	4	5	97
Local atmosphere	1	2	3	4	5	97
Friendliness of locals	1	2	3	4	5	97
A variety of things to see & do	1	2	3	4	5	97

SHOWCARD Q20

Q20 Overall, how satisfied or dissatisfied were you with your experience of Darwin where 1 is very dissatisfied and 5 is very satisfied? **SR**

Very dissatisfied	1
Fairly Dissatisfied	2
Neither satisfied nor dissatisfied	3
Fairly satisfied	4
Very satisfied	5
DON'T KNOW	6

Q22 Overall, do you have any feedback, whether that is positive or negative about your trip? Please think about your time in both Darwin & the Top End region and let us know what destination your comment refers to.

.....

SHOWCARD Q23-25

Q23 Overall how likely do you think you would be to re-visit Darwin, in the next 3 years, where 1 is very unlikely and 5 is very likely? **SR**

Very unlikely	1
Fairly unlikely	2
Neither likely or unlikely	3
Fairly likely	4
Very likely	5
DON'T KNOW	6

Q24 Overall how likely do you think you would be to travel beyond Darwin if you returned to the area where 1 is very unlikely and 5 is very likely? **SR**

Very unlikely	1
Fairly unlikely	2
Neither likely or unlikely	3
Fairly likely	4
Very likely	5
DON'T KNOW	6

Q25 Overall how likely is it you would recommend Darwin as a holiday destination to your friends or family where 1 is very unlikely and 5 is very likely? **SR**

Very unlikely	1
Fairly unlikely	2
Neither likely or unlikely	3
Fairly likely	4
Very likely	5
DON'T KNOW	6

SHOWCARD Q26

Q26 Did you say that you flew into Darwin? How would you rate your satisfaction with the airport where 1 is very dissatisfied and 5 is very satisfied? **READ OUT, SR**

Very Dissatisfied	1
Fairly dissatisfied	2
Neither satisfied nor dissatisfied	3
Fairly satisfied	4
Very Satisfied	5
Not relevant (did not fly into Darwin).....	6



You have nearly finished the survey. We just have a few classification questions.

B1a	How would you describe your travel party, that is, all persons with whom you directly travelled and shared most expenses? Travelled with... READ OUT. SR	
	No one else (alone)	1
	Partner	2
	Immediate family such your parent(s) and child(ren)	3
	Friends and / or relatives	4
	School, uni, college group (including school sporting group)	5
	Non-school Sporting group, community group or club	6
	Some other	97
	DO NOT READ OUT - DONT KNOW	99

B1b	Where do you live? SR	
	Adelaide/ other South Australia	1
	Brisbane	2
	Other Queensland	3
	Canberra/ ACT	4
	Melbourne	5
	Other Victoria	6
	Perth / Other Western Australia	7
	Sydney	8
	Other NSW	9
	Tasmania	10
	New Zealand	11
	UK	12
	Germany	13
	Italy	14
	France	15
	Other Europe	16
	USA / Canada	17
	Singapore	18
	Korea	19
	China	20
	Other Asia	21



International - Other 96

B1c	Which of the following age groups do you fit into? Are you? READ OUT. SR	
	18 to 24 years	1
	25 to 34 years	2
	35 to 44 years	3
	45-54 years	4
	55-64 years	5
	65 years or over	6

B2	RECORD GENDER; PLEASE CIRCLE <u>ONE</u> ANSWER ONLY	
	Male	1
	Female	2

B3	Do you currently have any children living at home with you? SR	
	Yes	1
	No	2

B4	Please indicate which <u>one</u> of the following best describes you. READ OUT. SR	
	Single (never married, divorced, separated, widowed and not part of a couple)	1
	Part of a couple (married, de facto, living together)	2

B5	Which of the following applies to you? READ OUT. SR	
	Work full time (30+ hours per week)	1
	Work part time (less than 30 hours per week)	2
	Not currently employed/ looking for work	3
	Retiree/ pensioner	4
	Mainly doing home duties	5
	Studying	6

**SHOWCARD B5a**

B5a Which of the following best describes your total household annual income before tax?

No personal income.....	1
Less than 10,000.....	2
\$10,001 - \$25,000.....	3
\$25,001 - \$45,000.....	4
\$45,001 - \$65,000.....	5
\$65,001 - \$80,000.....	6
\$80,001 - \$100,000.....	7
\$100,001 - \$120,000.....	8
\$120,001 - \$140,000.....	9
\$140,001 - \$160,000.....	10
\$160,001 or above.....	11
Prefer not to say.....	98

To what extent would you agree with the following statements 1 is strongly agree and 5 is strongly disagree?

READ OUT	Strongly Disagree	Disagree	Neutral	Agree	Strongly Agree
B6 It is important to visit places before too many people visit them.	1	2	3	4	5
B7 Stepping into the unknown is part of the adventure of my holidays.	1	2	3	4	5
B8 I actively seek out local people to learn about the area when I am on holiday.	1	2	3	4	5

C1. We might like to call you after your holiday, to chat in more detail about some of the things we've asked you about today. Would you be interested? It would be a telephone conversation of up to an hour, and we would pay you \$80 for your time.

Yes - interested 1
 No - not interested..... 2

If C1=1 please record their name & telephone number

Name:

Telephone: (Home)

Telephone: (Mobile)

Thank you for your time. As we mentioned at the beginning, your answers will be totally confidential and will be used for market research purposes only. Here is your souvenir.



INTERVIEWER NAME: _____

EMPLOYEE No: _____

SIGNATURE: _____

Please note that the data contained in this proposal has been prepared for the specific purpose of addressing the items contained in the project contract between **TNS Australia** and **DRET**. It may not be suitable for other applications. The use of this data for any other purpose should be discussed with the lead author. TNS accepts no responsibility for unauthorised use of this data by a third party.

Kakadu National Park



IMAGE COURTESY OF TOURISM NT

