

# Top End regional report

(including Greater Darwin, Kakadu Arnhem and Katherine Daly tourism regions)

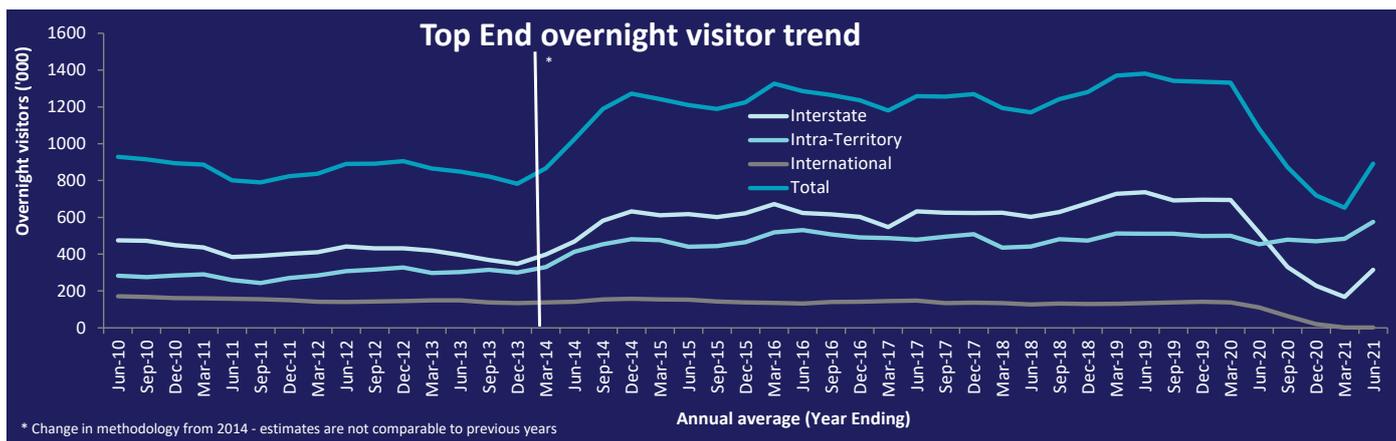
Year Ending (YE) June 2021



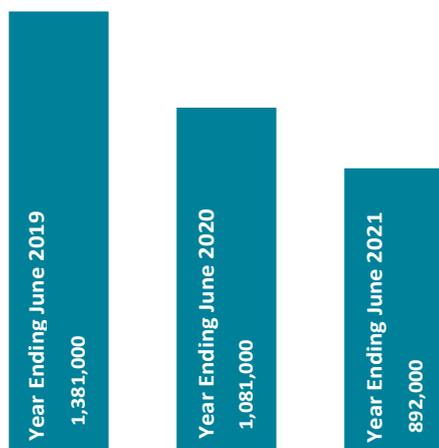
## Visitor numbers in the Top End

Top End overnight	Intra-Territory	Interstate	Domestic	Total
Visitors	576,000	315,000	891,000	892,000
Visitor nights	1,565,000	2,528,000	4,093,000	4,266,000
ALOS (average length of stay, nights)	2.7	8.0	4.6	4.8
Expenditure	\$425M	\$547M	\$972M	\$983M
ASPT *(average spend per trip)	\$739	\$1,738	\$1,092	\$1,102

Note: International figures have not been separately reported in the above table as they were at very low levels due to COVID-19 restrictions.



### Annual overnight visitor numbers to the region



Note: The visitor decrease is due to a reduction in international and interstate visitation to the Top End due to COVID-19 restrictions.

### Region definition

The Top End tourism region comprises the Darwin, Litchfield Kakadu Arnhem and Katherine Daly tourism regions. The regional boundaries of these regions are defined by the Australian Bureau of Statistics (ABS) Cat. No. 9503.0.55.001.



### Source note

All information is derived from Tourism Research Australia's (TRA) National and International Visitor Surveys unless otherwise stated. For more information on the surveys, please refer to TRA's website.

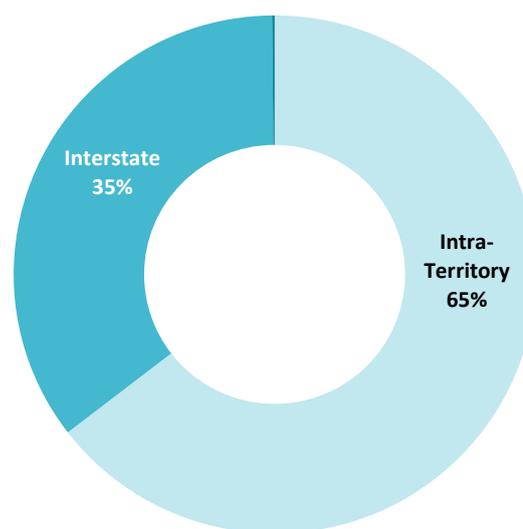
# Top End regional report

YE June 2021

## WHERE do visitors come from and WHY?

Place of origin	Visitors	Visitor nights	ALOS (nights)
Intra-Territory	576,000	1,565,000	2.7
Interstate	315,000	2,528,000	8.0
QLD	32%	32%	8.0
NSW	21%	23%	8.7
VIC	16%	16%	8.2
SA	14%	13%	7.9
WA	11%	11%	7.9
ACT	5%	3%	5.3
TAS	1%	2%	9.9

### Top End source markets



*Note: The size of interstate markets was impacted by border closures into the Northern Territory (NT).*

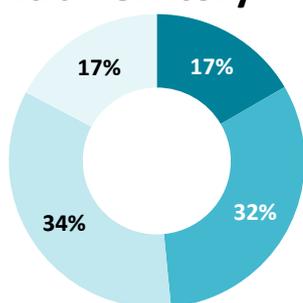
Purpose of visit*	Intra - Territory	Interstate	Domestic
Holiday	54%	47%	52%
Visiting friends and relatives	11%	19%	14%
Business	30%	35%	32%
Other reasons**	6%	6%	6%

*\*Purpose of visit figures do not add up to 100% as visitors can visit several places within a region for different purposes.*

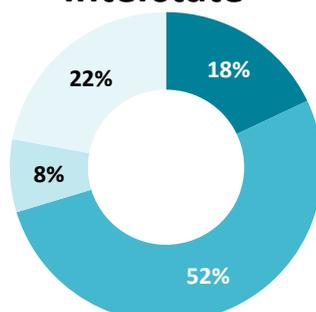
*\*\*Includes employment, education, other reason, no other reason and in transit.*

## WHAT time of year do visitors come?

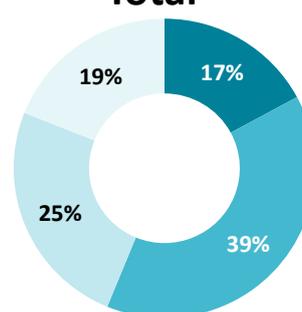
### Intra-Territory



### Interstate



### Total



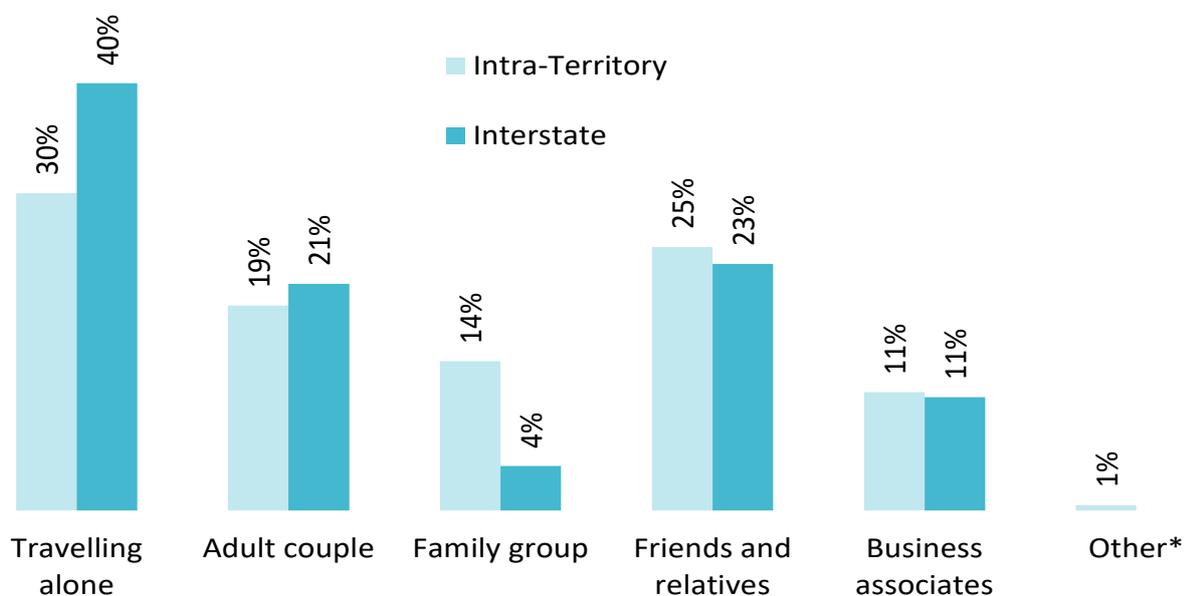
- March quarter
- June quarter
- September quarter
- December quarter

*Note: The timing of visit was impacted by border closures into the NT due to COVID-19, as well as normal seasonal variations.*

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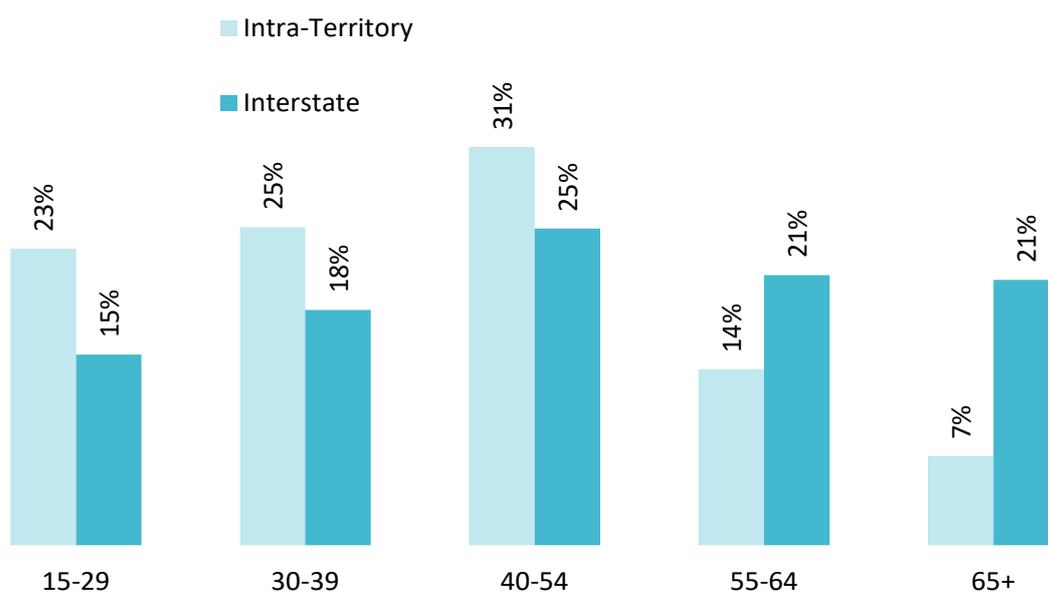
## WHO are our visitors travelling with?



\*Includes school/uni/college group, non-school sporting group/community group or club and other.

Note: Year on year percentage change from YE June 2020 to YE June 2021 for interstate travel was down for "family group" and "friends and relatives" travel party types, not surprising with COVID-19 restrictions contributing to this result.

## WHAT age are our visitors?

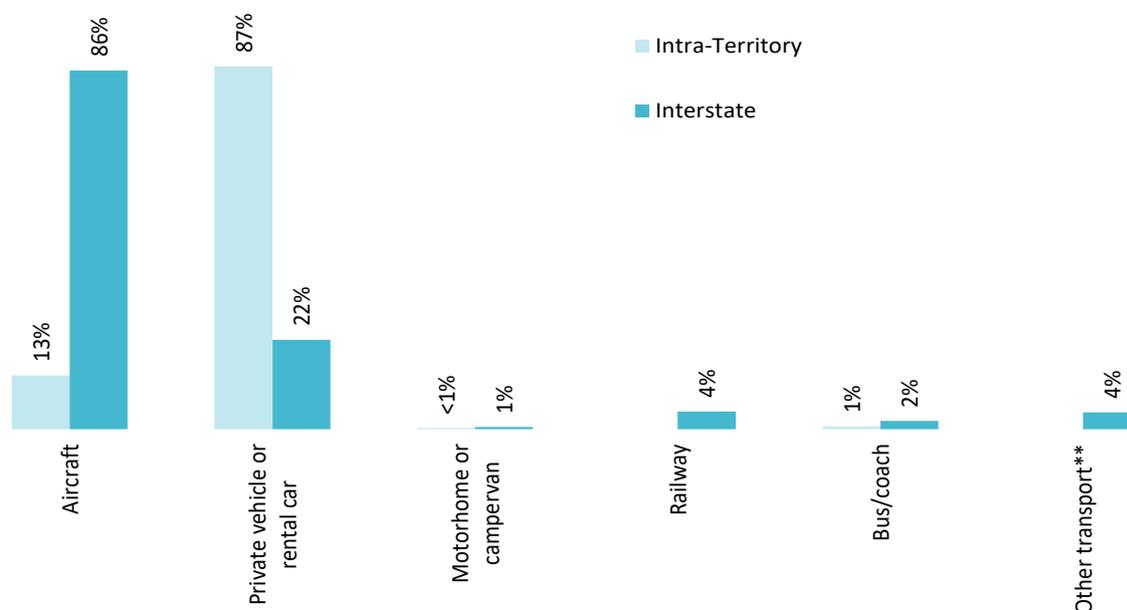


Note: Year on year percentage change from YE June 2020 to YE June 2021 for interstate travel was down for most age groups. Intra-Territory travel was up for most age groups in the same period. COVID-19 border restrictions would have contributed to this result, with people choosing to substitute outbound travel with travel within the NT or their own state.

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## Proportion of transportation\* used by intra-Territory and interstate travellers



\*Transportation refers to stopover transportation and includes transportation used to arrive and used within the region.

\*\*Includes long distance transport, local transport, other land transport, water transport, other transport and not stated/asked.

Note: Aircraft transport mode was mainly used by interstate visitors, while self drive private vehicle or rental car was the primary mode of transport for intra-Territory travel, possibly as more Territorians substituted outbound travel for holidays in the NT due to COVID-19 over this period.

## WHO also went to Central Australia?

Dispersal	Intra-Territory	Interstate	Domestic
Top End visitors who also went to Central Australia	5%	10%	7%

## WHERE did they go in the Top End?

Statistical Area Level [SA2 group]	Proportion of Top End visitors	Statistical Area Level [SA2 group]	Proportion of Top End visitors
Darwin city	45%	Victoria River	1%
Darwin suburbs	3%	Gulf	2%
Palmerston suburbs	2%	Alligator	24%
Howard Springs - Koolpinyah	1%	East Arnhem	4%
Humpty Doo - Weddell	2%	West Arnhem	2%
Katherine	13%	Anindilyakwa	2%
Elsey	10%	Nhulunbuy	1%
Daly - Thamarrurr	4%	Tiwi Islands	<1%

# Top End regional report

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## The domestic leisure drive\* market in focus

Domestic leisure drive	Intra-Territory	Interstate	Domestic
Visitors	88%	12%	416,000
Visitor nights	74%	26%	1,173,000
ALOS (nights)	2.4	6.1	2.8

Domestic leisure drive visitors accounted for approximately 47% (or 416,000 visitors) of all domestic visitors to the region.

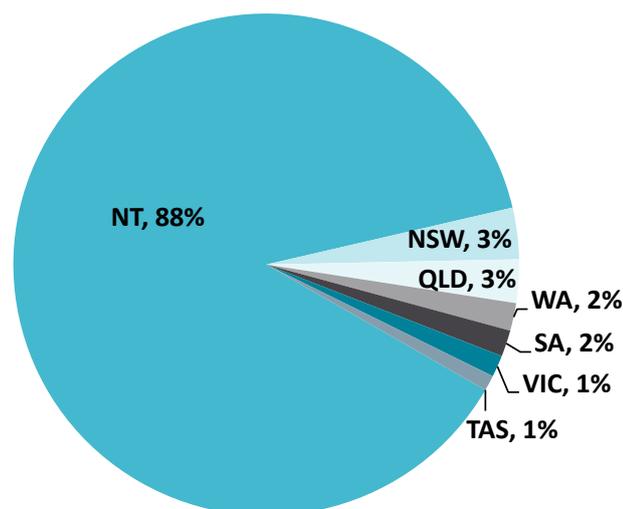
### Domestic source markets

NT residents made up 88% of the domestic leisure drive market for the Top End. This may reflect Darwin residents travelling to the Outer Darwin region on short trips, e.g. an overnight trip to Litchfield. New South Wales and Queensland were the largest interstate drive markets making up 3% of visitors each. They were closely followed by Western Australia and South Australia at 2%.

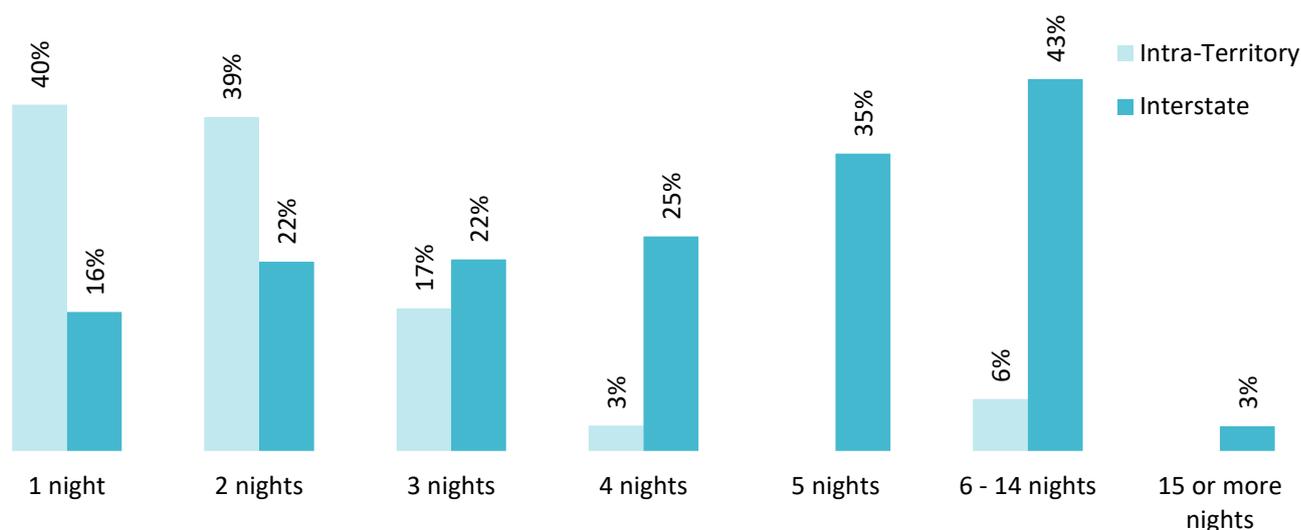
### Length of stay

Approximately 91% of domestic leisure drive visitors stayed for three nights or less. Influencing this result is the high proportion of Territorians travelling for two or fewer nights.

### Domestic leisure drive source market



### Length of stay - Domestic leisure drive market



\*Domestic leisure drive is defined as domestic visitors who travelled for the purpose of a holiday or visiting friends and relatives that also used drive transportation in the region.

Note: Expenditure data is not available by type of transportation used.

Year on year percentage change from YE June 2020 to YE June 2021 suggests interstate visitors will spend more nights (3 nights and over) in the Territory than intra-Territory visitors on leisure drive holidays. Results are impacted by COVID-19.

# Top End regional report

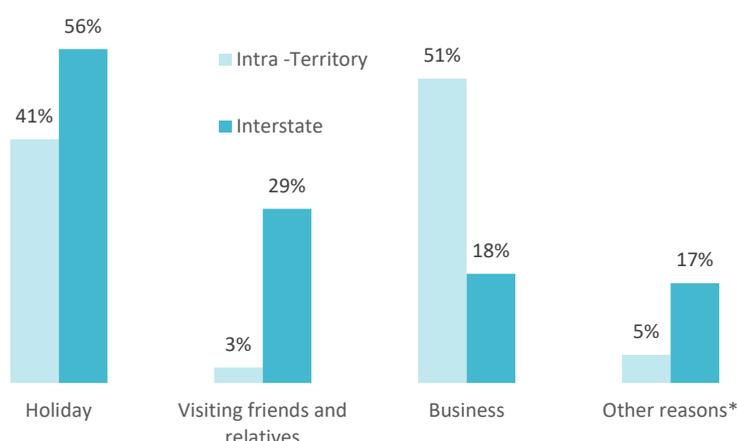
YE June 2021

## Youth visitation to the region

Youth	Intra-Territory	Interstate	Domestic
Visitors	75%	25%	170,000
Visitor nights	44%	56%	778,000
ALOS (nights)	2.7	10.5	4.6

*Youth is defined as any visitor aged 15 to 29 years of age, who did not travel as part of a family group (parents and children) or school group.*

### Youth purpose of visit



The youth market contributes 19% of all domestic visitors to the Top End region. They also contribute a significant number of nights with 778,000 nights or 19% of all nights in the region.

Intra-Territory youth makes up three quarters (75%) of the youth market in the Top End. Interstate youth make up the remaining one quarter (25%) of the market, however they stay four times longer than intra-Territory youth.

\*Includes employment, education, other reason, no other reason and in transit.

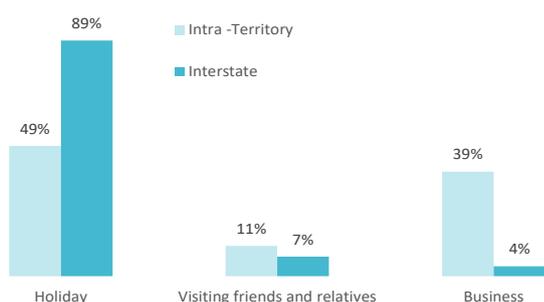
## Visitors interested in Aboriginal cultural experiences/participation

Aboriginal culture	Intra-Territory	Interstate	Domestic
Visitors	63%	37%	73,000*
Visitor nights	41%	59%	263,000
ALOS (nights)	2.3	5.7	3.6

Aboriginal culture is a niche segment for those visiting the Top End region, with approximately one in ten (8%) visitors participating in these activities.

The majority of those who were interested in Aboriginal culture were in the region for the purpose of a holiday. More specifically, 49% of intra-Territory visitors and 89% of interstate visitors who participated in Aboriginal cultural activities were on a holiday.

### Aboriginal culture purpose of visit

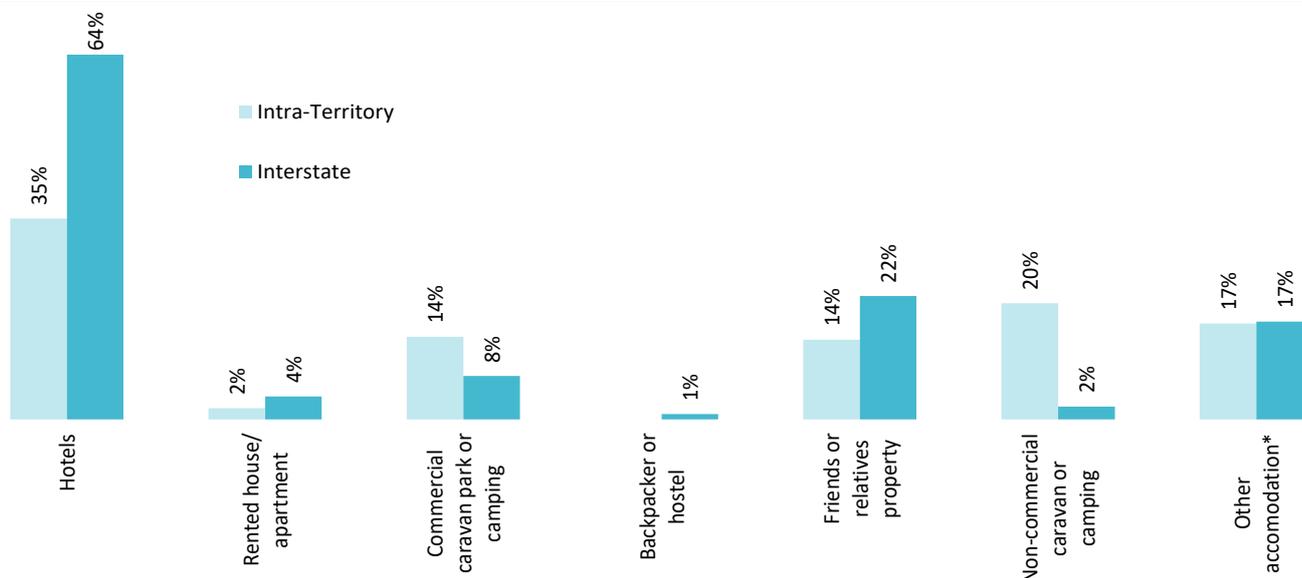


*Aboriginal cultural experiences include: experience Aboriginal art/ craft and cultural displays, visit an Aboriginal site/ community, and/or attend an Aboriginal performance.*

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## WHERE did they stay?



\*Includes guest house/ bed and breakfast, other commercial accommodation (e.g. boat, glamping, other), own property, other private accommodation, other accommodation, in transit and not stated/asked. Note: short term letting could come under a number of accommodation types.

Note: Year on year percentage change from YE June 2020 to YE June 2021 for intra-Territory travel was down for hotels, but up for commercial and non-commercial caravan and camping with Territorians substituting outbound travel for holidaying in the NT due to COVID-19 restrictions.

## WHAT activities did they do?

### Eat out and dining



55%

### Visit national parks



27%

### Bushwalks



25%

### Pubs clubs disco



23%

### Sightseeing



20%

### Visit friends and relatives



20%

### Exercise gym swimming



20%

### Go shopping



16%

### Fishing



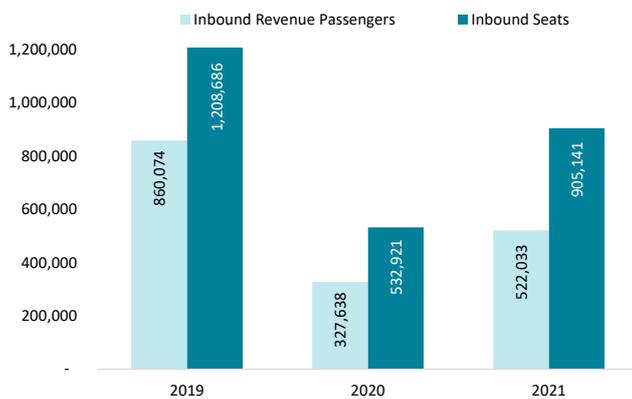
15%

Note: Activities include domestic overnight visitors only. Activities reported would have taken place in the NT.

# Top End regional report

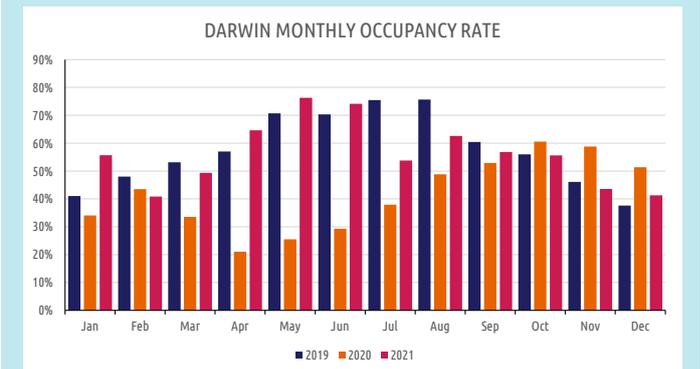
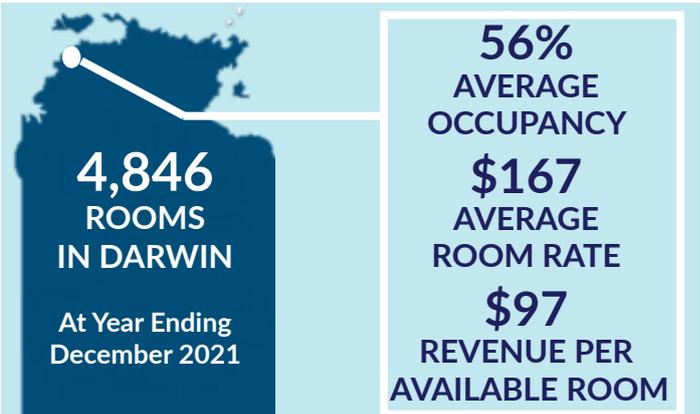
## Industry sector news

### Airport traffic data Darwin



Source: Bureau of Infrastructure, Transport and Regional Economics.  
Note: The decrease/ increase in figures was impacted by COVID-19 restrictions, including closure of international borders.

### Darwin accommodation



Source: STR Destination Report YE December 2021, 2020 and 2019.  
Darwin hotel accommodation with 10+ rooms.

Note: When compared to YE December 2019, average occupancy went down -1.4 percentage points, average room rate went up +19% and revenue per available room went up +14%. Room supply went down 475 rooms.

#### More information on the surveys:

Visitor numbers, nights and spend estimates are derived from Tourism Research Australia's (TRA) National and International Visitor Surveys (NVS and IVS). These surveys are based on sample rather than census, and as such, are subject to sampling variability. When using these estimates at the destination level, this variability increases. Confidence intervals and sample for the region are highlighted in the lefthand side table below.

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

### Park visitation

Park	YE June 2020	YE June 2021	Change
Casuarina Coastal Reserve	642,000	1,276,000	99%
Darwin Botanical Gardens	192,000	475,000	147%
Litchfield National Park	245,000	224,000	-8.5%
Elsley National Park	164,000	218,000	33%
Nitmiluk Gorge	145,000	156,000	7.6%
Howard Springs Nature Park	68,000	127,000	86%
Berry Springs Nature Park	105,000	117,000	11%
Charles Darwin Nature Park	81,000	82,000	1.2%
Leliyn/ Edith Falls	87,000	99,000	13%
Territory Wildlife Park	46,000	54,000	17%
Fogg Dam Conservation Reserve	57,000	50,000	-12%
Mary River National Park	22,000	37,000	66%
Gregory National Park	26,000	33,000	24%

Source: NT Parks and Wildlife Commission.

TOP END Year Ending JUNE 2021	Sample size	95% Confidence Interval	
		Visitors	Visitor nights
Intra-Territory	224	+/-14%	+/-26%
Interstate	137	+/-19%	+/-20%
International	np	np	np

np = not publishable