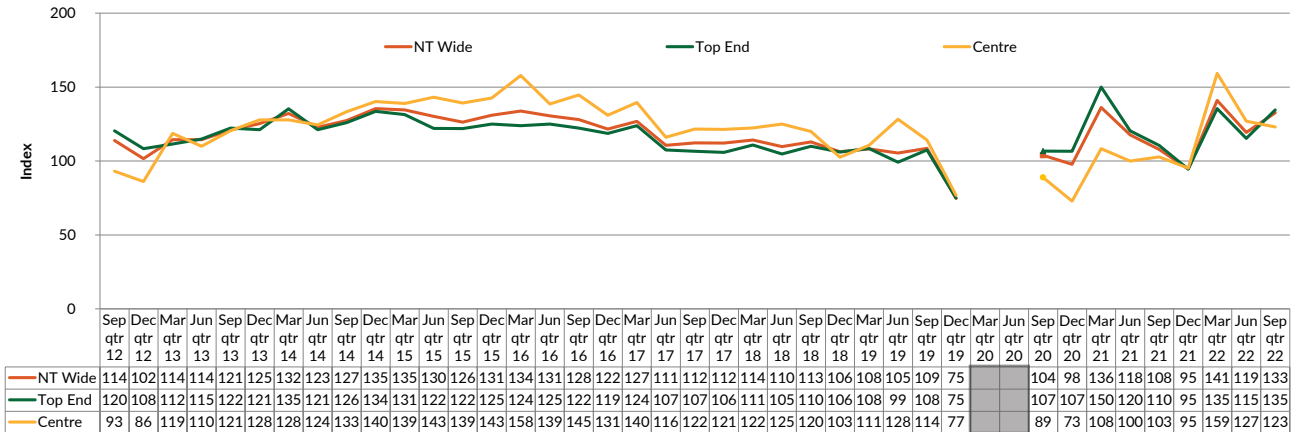


Tourism NT Industry Sentiment Poll September Quarter 2022

Industry Sentiment Poll: Business Outlook

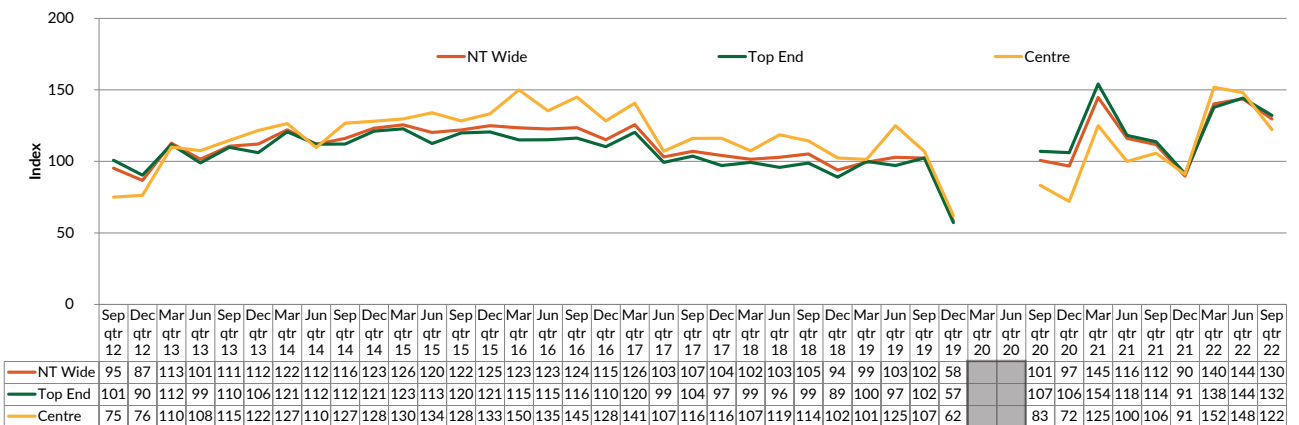
Question: What do you think the outlook for tourism will be like for the next 12 months for your own tourism business?



Note: Shaded section with no data relates to period where the sentiment poll was halted due to COVID-19.

Industry Sentiment Poll: Regional Outlook

Question: What do you think the outlook for tourism will be like for the next 12 months for your region?



Note: Shaded section with no data relates to period where the sentiment poll was halted due to COVID-19.

Operator sentiment across all regions in regards to their own business outlook was positive for the next 12 months. Sentiment across the NT is looking positive as Australia transitions away from the COVID-19 response measures. Operator outlook for the tourism region was similar to the assessment for their own business. This sentiment resonated with the Territory wide business confidence survey¹, with business confidence levels for the September quarter 2022 up 4 percentage points to 76 percent from the June quarter 2022. The NT business confidence is a quarterly publication that highlights confidence levels of Territory businesses across urban and regional areas as well as different industry sectors and business sizes.

¹ NT business confidence survey, September quarter 2022, <https://industry.nt.gov.au/economic-data-and-statistics/business/business-statistics/business-confidence-survey>

Tourism NT Industry Sentiment Poll September Quarter 2022

BUSINESS OUTLOOK

- Darwin and Surrounds (129ix)
- Katherine (163ix)
- Kakadu Arnhem (120ix)
- Barkly/Tablelands (no data)
- Alice Springs and Surrounds (130ix)
- Uluru and Surrounds (120ix)



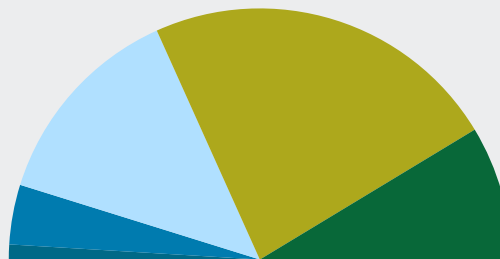
REGIONAL OUTLOOK

- Darwin and Surrounds (128ix)
- Katherine (158ix)
- Kakadu Arnhem (111ix)
- Barkly/Tablelands (no data)
- Alice Springs and Surrounds (128ix)
- Uluru and Surrounds (120ix)

TOP END BUSINESS OUTLOOK

135 IX*

35 points above baseline n = 52

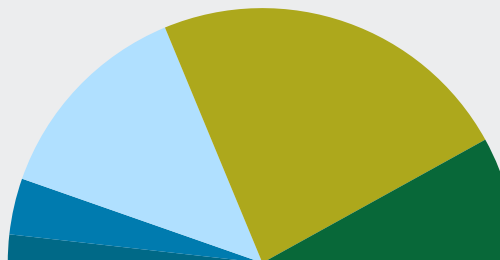


- Very Poor 2%
- Poor 8%
- Remain the same 27%
- Good 46%
- Very Good 17%

TOP END REGIONAL OUTLOOK

132 IX*

32 points above baseline n = 56

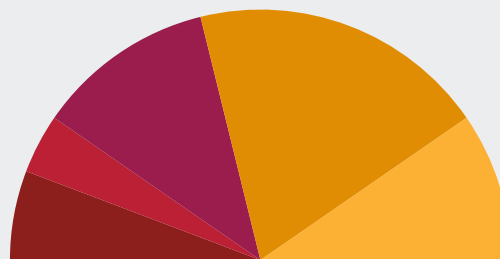


- Very Poor 4%
- Poor 7%
- Remain the same 27%
- Good 46%
- Very Good 16%

CENTRE BUSINESS OUTLOOK

123 IX*

23 points above baseline n = 26

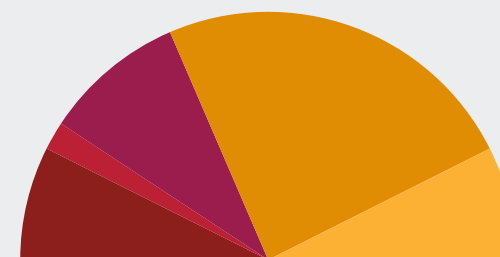


- Very Poor 12%
- Poor 8%
- Remain the same 23%
- Good 38%
- Very Good 19%

CENTRE REGIONAL OUTLOOK

122 IX*

22 points above baseline n = 27



- Very Poor 15%
- Poor 4%
- Remain the same 19%
- Good 48%
- Very Good 15%

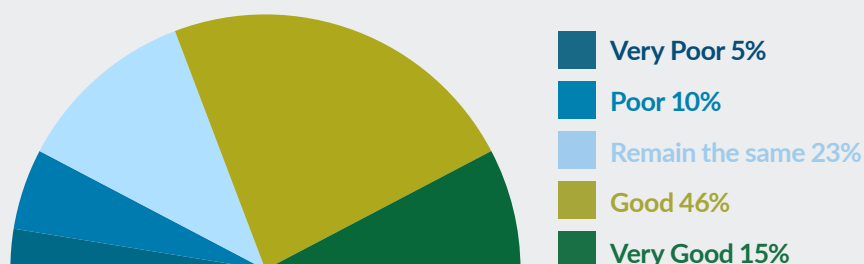
Tourism NT Industry Sentiment Poll September Quarter 2022

DARWIN AND SURROUNDS REGIONAL OUTLOOK INDEX*

128

IX*

n = 39



28 points above baseline

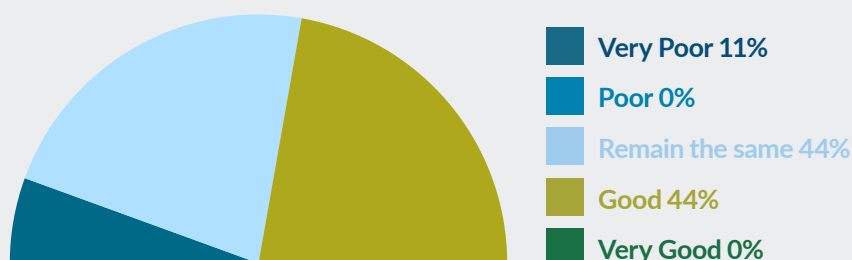
Operator outlook for the Darwin and Surrounds region was higher with just under two thirds (61%) having a positive outlook for the next 12 months.

KAKADU ARNHEM REGIONAL OUTLOOK INDEX*

111

IX*

n = 9



11 points above baseline

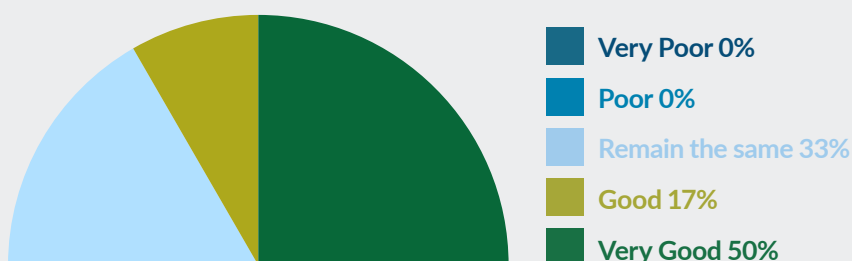
Operator outlook for the Kakadu Arnhem region was higher with over two fifths (44%) reporting a positive outlook for the next 12 month period.

KATHERINE AND SURROUNDS REGIONAL OUTLOOK INDEX*

158

IX*

n = 6

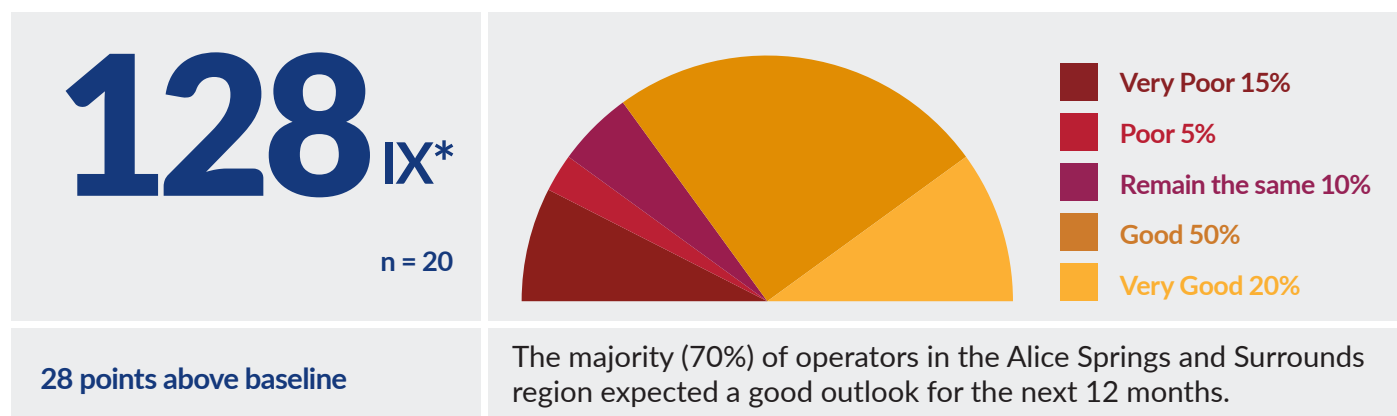


58 points above baseline

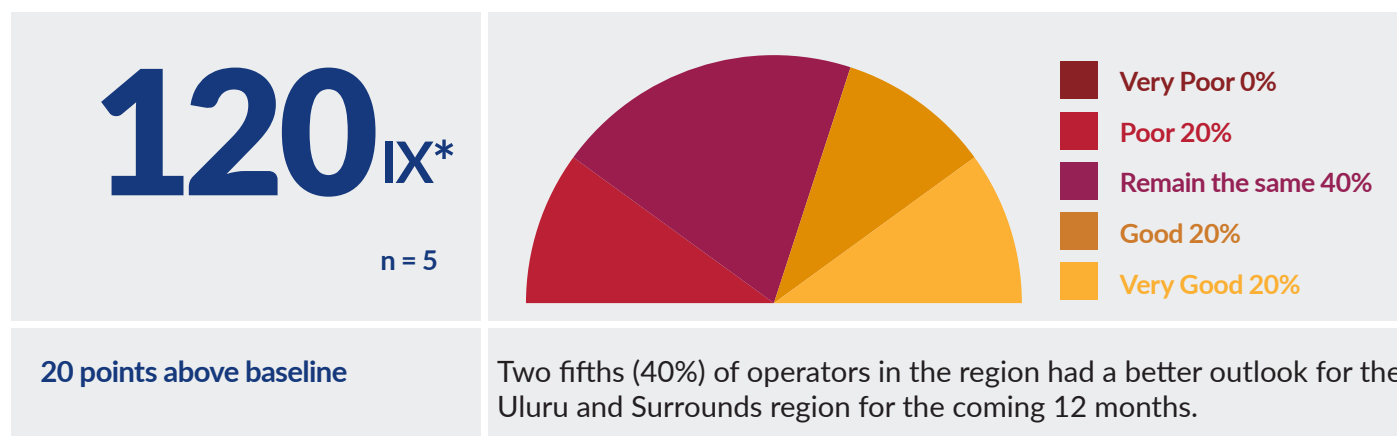
Approximately two thirds (67%) of operators in the Katherine and Surrounds region had a positive outlook for the next 12 months.

Tourism NT Industry Sentiment Poll September Quarter 2022

ALICE SPRINGS AND SURROUNDS REGIONAL OUTLOOK INDEX*



ULURU AND SURROUNDS REGIONAL OUTLOOK INDEX*



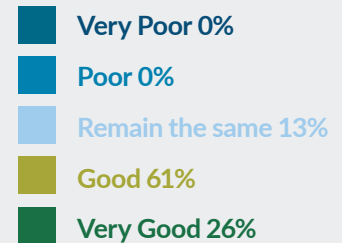
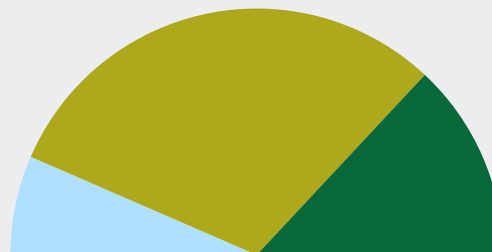
NOTE: Barkly/Tablelands regional outlook index has been removed, due to no operators from this region participating in the Industry Sentiment Poll for this quarter.

Tourism NT Industry Sentiment Poll September Quarter 2022

NT BUSINESS OUTLOOK BY SECTOR - Accommodation

157 IX*

57 points above baseline n = 23



NT BUSINESS OUTLOOK BY SECTOR - Attractions

150 IX*

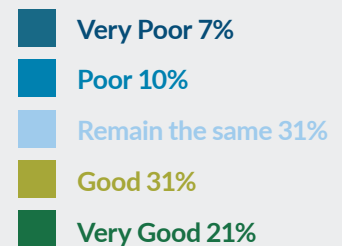
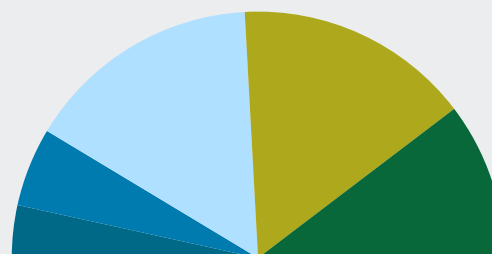
50 points above baseline n = 10



NT BUSINESS OUTLOOK BY SECTOR - Touring and Transport

124 IX*

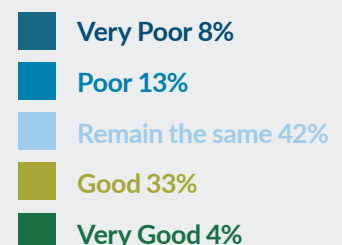
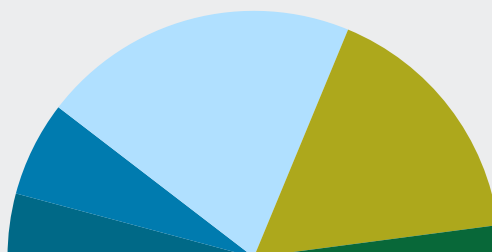
24 points above baseline n = 29



NT BUSINESS OUTLOOK BY SECTOR - All other Sectors

106 IX*

6 points above baseline n = 24

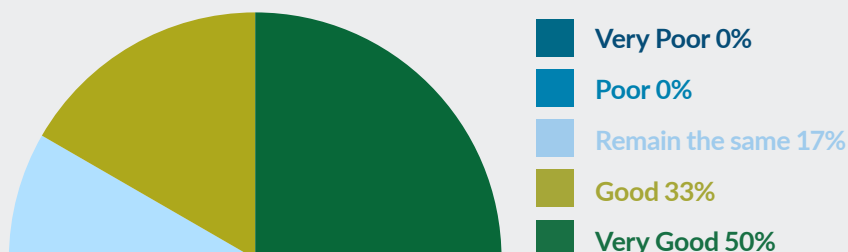


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NT REGION OUTLOOK - Aboriginal Tourism Business

167 IX*

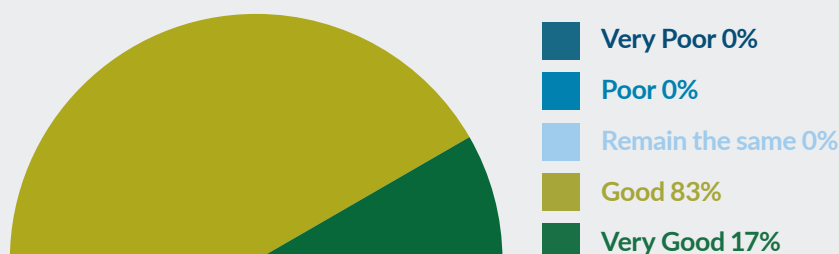
67 points above baseline n = 6



NT BUSINESS OUTLOOK - Aboriginal Tourism Business

158 IX*

58 points above baseline n = 6



Operator sentiment for Aboriginal tourism businesses in regards to own business outlook and regional outlook was mostly positive.

Disclaimer: The Northern Territory of Australia exercised due care and skill to ensure that at the time of publication the information contained in this publication is true and correct. However, it is not intended to be relied on as professional advice or used for commercial purposes. The Territory gives no warranty or assurances as to the accuracy of the information contained in the publication and to the maximum extent permitted by law accepts no direct or indirect liability for reliance on its content.

Tourism Research Australia estimated that there were 1,443 employing tourism businesses across the Northern Territory in 2020-21. Eighty operators participated in the Industry Sentiment Poll for the September quarter 2022. Results presented for the Top End region from the Industry Sentiment Poll are informed by a sample size of 60 tourism operators. Results presented for the Centre region from the Industry Sentiment Poll are informed by a sample size of 27 tourism operators. As such, these results are not representative of regional performance or a census of operator sentiment. Please also note operators can overlap between Top End and Centre regions. For more information, please contact the Research team on: research.tourismnt@nt.gov.au

***Using the Index measure:** Each Index measure is derived by assigning a value of 0 to a 'large decrease' response, 50 to 'decrease', 100 to 'same', 150 to 'increase' and 200 to a 'large increase'. An average value of 100 across operators therefore indicates performance is "on par with the previous year".

Notes:

- a:** Figures might not add up to 100% due to rounding.
- b:** Respondents may be operating in multiple sectors, therefore the sum of sectors will not add up to total respondents.