

Top End regional report

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

Year Ending (YE) June 2022

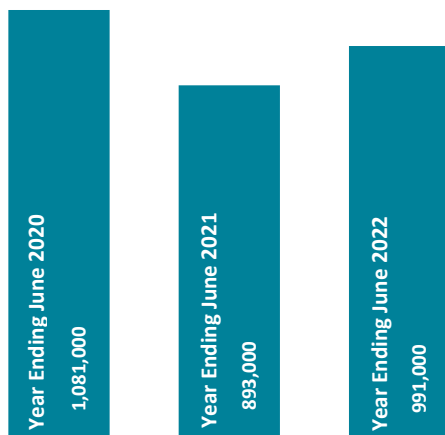


Visitor numbers in the Top End

Top End overnight	Intra-Territory	Interstate	Domestic	International	Total
Visitors	457,000	514,000	971,000	20,000	991,000
Visitor nights	1,315,000	4,809,000	6,124,000	814,000	6,938,000
ALOS (average length of stay, nights)	2.9	9.4	6.3	40.7	7.0
Expenditure	\$392M	\$1,108M	\$1,500M	\$63M	\$1,563M
ASPT *(average spend per trip)	\$857	\$2,154	\$1,544	\$3,145	\$1,576



Annual overnight visitor numbers to the region



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.



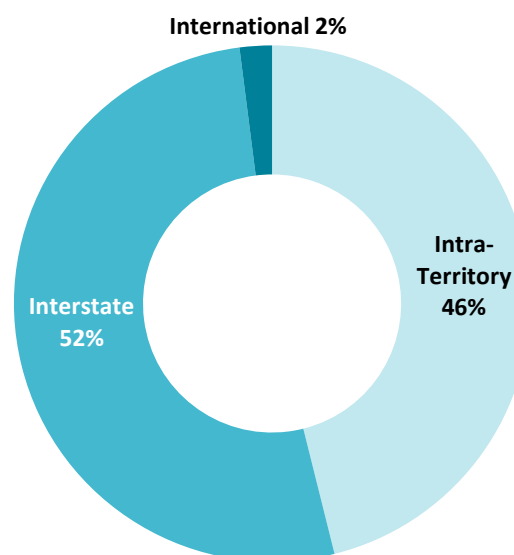
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WHERE do visitors come from and WHY?

Place of origin	Visitors	Visitor nights	ALOS (nights)
Intra-Territory	457,000	1,315,000	2.9
Interstate	514,000	4,809,000	9.4
VIC	24%	28%	11.0
QLD	23%	24%	9.8
SA	19%	15%	7.4
WA	17%	16%	8.6
NSW	15%	15%	9.1
TAS	1%	1%	10.9
ACT	1%	1%	11.3

Top End source markets



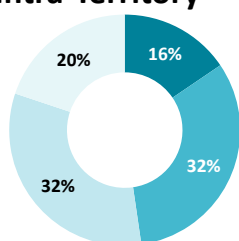
Purpose of visit*	Intra - Territory	Interstate	Domestic	International
Holiday	59%	51%	55%	52%
Visiting friends and relatives	10%	22%	17%	19%
Business	25%	28%	27%	8%
Other reasons**	6%	4%	5%	25%

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

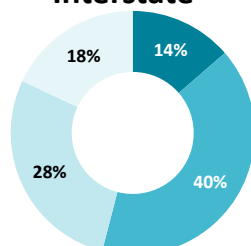
**Includes employment, education, other reason, no other reason and in transit.

WHAT time of year do visitors come?

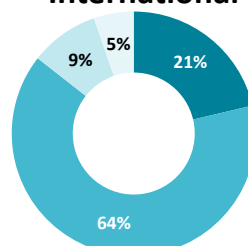
Intra-Territory



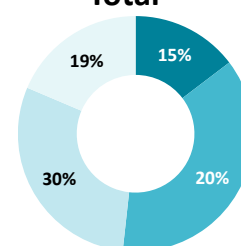
Interstate



International



Total



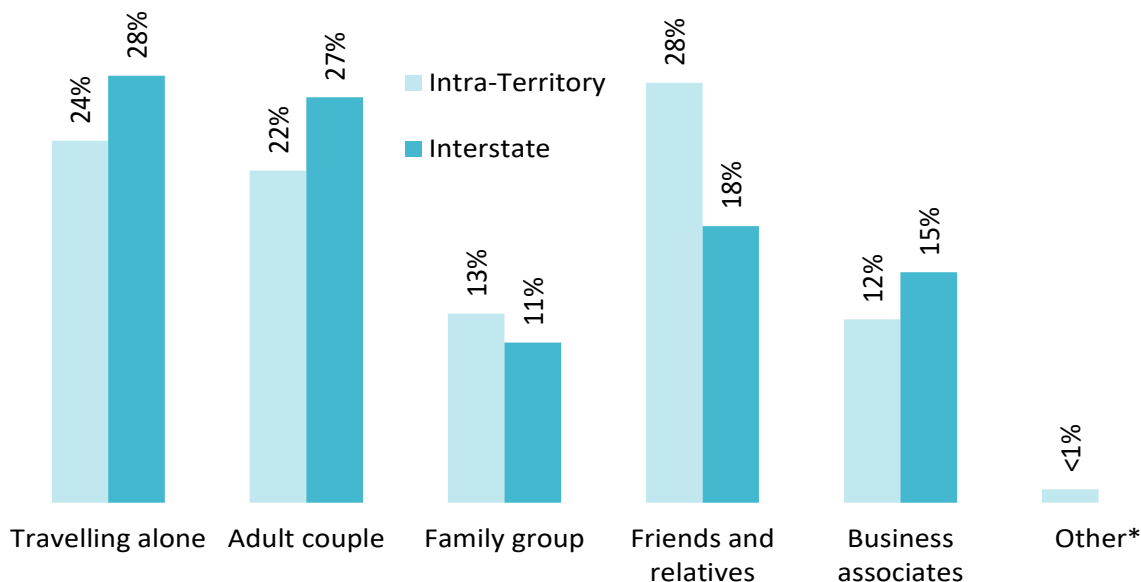
- March quarter
- June quarter
- September quarter
- December quarter

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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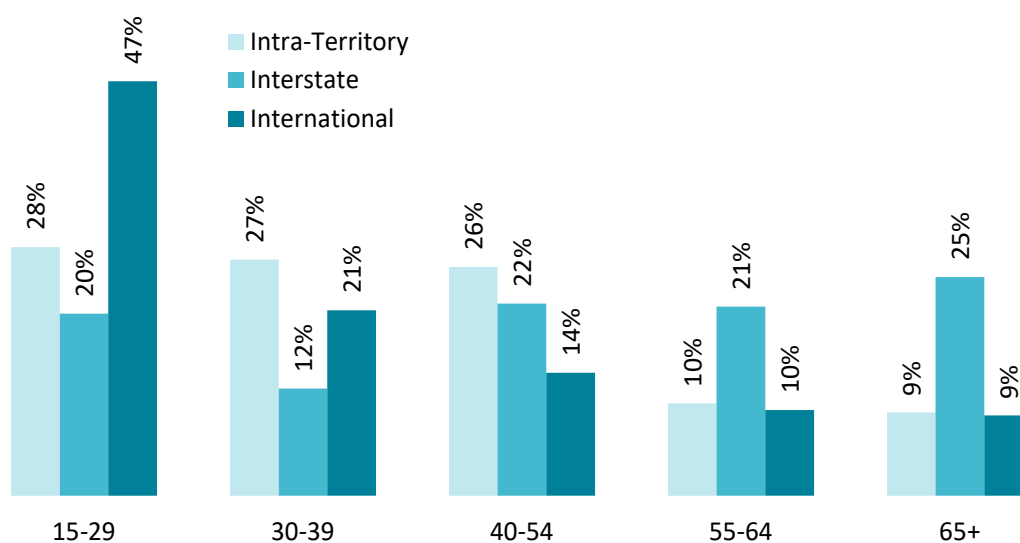
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WHO are our visitors travelling with?



*Includes school/uni/college group, non-school sporting group/community group or club and other. Data in the graph reflects proportion of travel party by intra-Territory and interstate visitors. Note: Year on year percentage change from YE June 2021 to YE June 2022 for interstate travel was up for all travel party types, while all travel party types for intra-Territory travel was down with the exception of the "Other" category. These results reflect easing of COVID-19 restrictions which would have encouraged interstate travel.

WHAT age are our visitors?

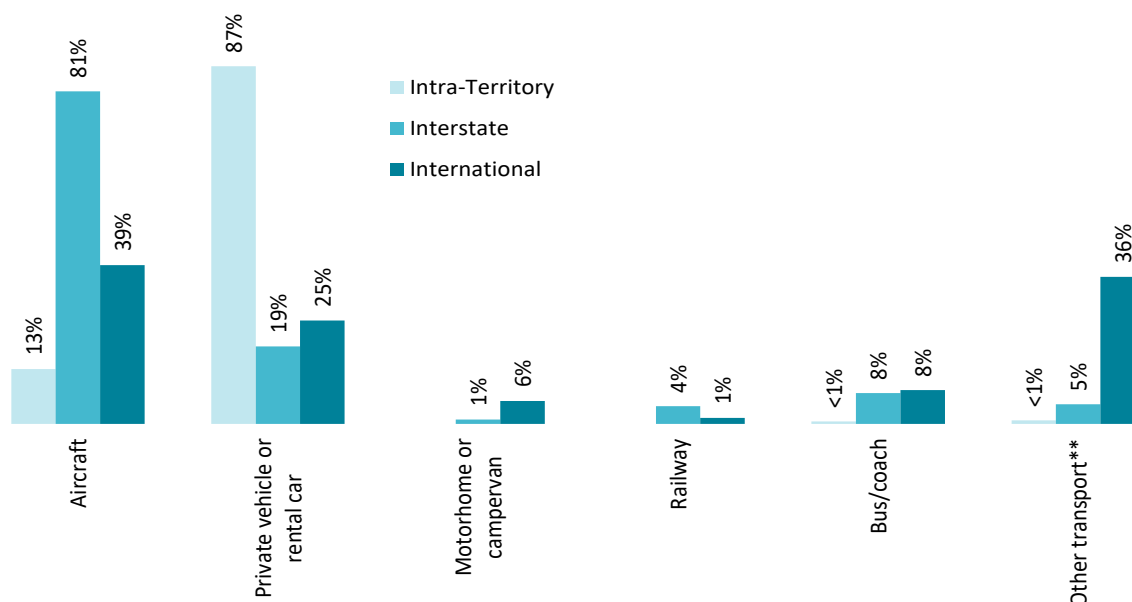


Data in the graph reflects proportion of intra-Territory, interstate and international visitors. Note: Year on year percentage change from YE June 2021 to YE June 2022 for interstate and international travel was up for all age groups. Intra-Territory travel was down for most age groups in the same period except for people aged 65 and over. The easing of COVID-19 would have contributed to this result, with interstate and international travel now possible.

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Proportion of transportation* used by 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: Year on year percentage change from YE June 2021 to YE June 2022 shows aircraft transport mode as well as private vehicle or rental car increased for interstate and international travel, while the same modes of transport were down for intra-Territory travel. This is likely due to the easing of COVID-19 restrictions making interstate and international travel to the NT more accessible.

WHO also went to Central Australia?

Dispersal	Intra-Territory	Interstate	International
Top End visitors who also went to Central Australia	2%	7%	22%

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	52%	Victoria River	4%
Darwin suburbs	7%	Gulf	2%
Palmerston suburbs	3%	Alligator	25%
Howard Springs - Koolpinyah	1%	East Arnhem	2%
Humpty Doo - Weddell	1%	West Arnhem	1%
Katherine	17%	Anindilyakwa	2%
Eley	6%	Nhulunbuy	2%
Daly - Thamarrurr	6%	Tiwi Islands	1%

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The domestic leisure drive* market in focus

Domestic leisure drive	Intra-Territory	Interstate	Domestic
Visitors	78%	22%	388,000
Visitor nights	50%	50%	1,409,000
ALOS (nights)	2.3	8.2	3.6

Domestic leisure drive visitors accounted for approximately 40% (or 388,000 visitors) of all domestic visitors to the region.

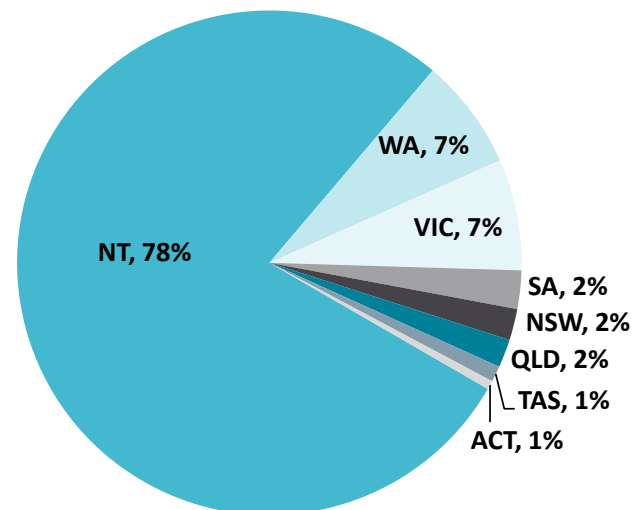
Domestic source markets

NT residents made up 78% 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. Western Australia and Victoria were the largest interstate drive markets making up 7% of visitors each. They were followed by South Australia, New South Wales and Queensland at 2% each.

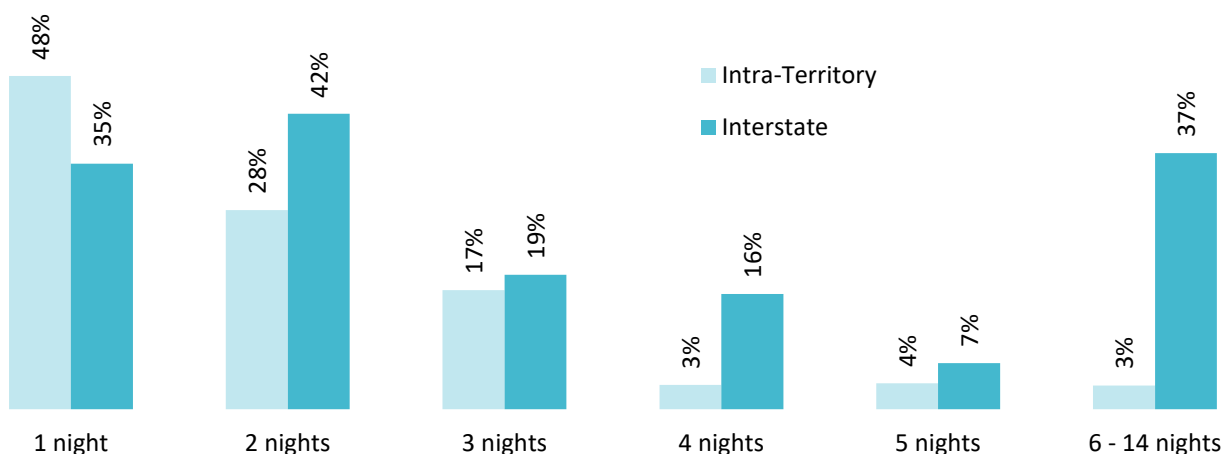
Length of stay

Approximately 94% 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.

Data in the graph reflects the proportion of intra-Territory and interstate visitors by duration of nights spent.

Year on year percentage change from YE June 2021 to YE June 2022 suggests the largest increases for interstate leisure drive visitors were for trips of 1-2 nights and 15-30 nights duration, while intra-Territory leisure drive visitors showed the largest decline for trips lasting between 6-14 nights.

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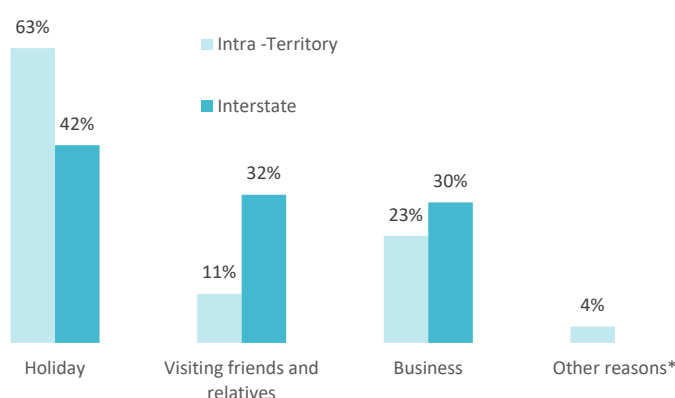
YE June 2022

Youth visitation to the region

Youth	Intra-Territory	Interstate	Domestic
Visitors	53%	47%	217,000
Visitor nights	27%	73%	1,048,000
ALOS (nights)	2.5	7.6	4.8

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 22% of all domestic visitors to the Top End region. They also contribute a significant number of nights with 1,048,000 nights or 17% of all nights in the region.

Intra-Territory youth makes up just over half (53%) of the youth market in the Top End. Interstate youth make up the remaining half (47%) of the market, however they stay on average five days longer than intra-Territory youth.

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

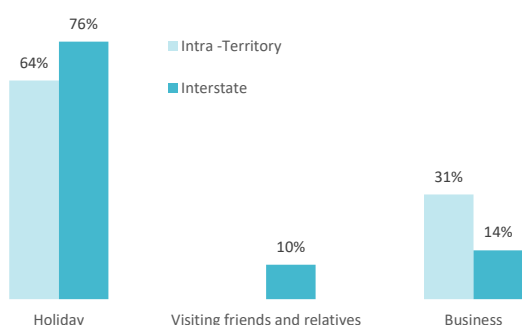
Visitors interested in Aboriginal cultural experiences/participation

Aboriginal culture	Intra-Territory	Interstate	Domestic
Visitors	23%	77%	105,000
Visitor nights	16%	84%	572,000
ALOS (nights)	3.6	6.0	5.5

Aboriginal culture is a niche segment for those visiting the Top End region, with approximately one in ten (11%) 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, 64% of intra-Territory visitors and 76% of interstate visitors who participated in Aboriginal cultural activities were on a holiday.

Aboriginal culture purpose of visit

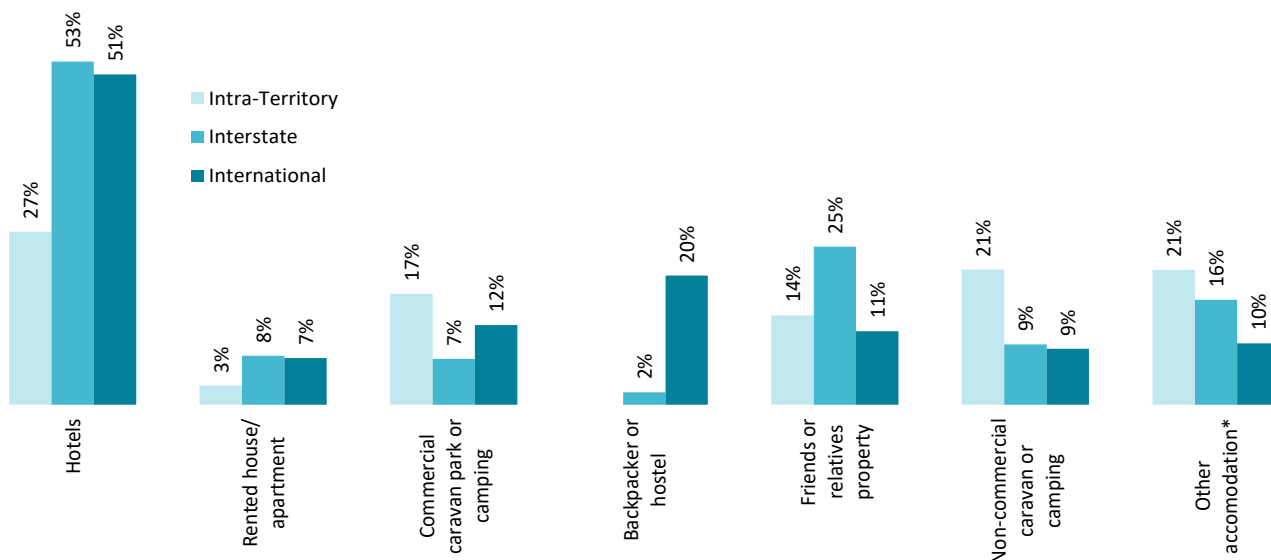


Aboriginal cultural experiences include: experience Aboriginal art/craft and cultural displays, visit an Aboriginal site/ community, attend an Aboriginal performance, go on a tour with an Aboriginal guide, participate in traditional activities, have an Aboriginal food experience and/or have a camping experience on Aboriginal land.

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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. Data in the graph reflects proportion of intra-Territory, interstate and international visitors by stopover accommodation used.

Note: Year on year percentage change from YE June 2021 to YE June 2022 was up for all accommodation types for international and interstate visitors, reflecting the easing of COVID-19 restrictions. For intra-Territory travel, all accommodation types were down with the exception of rented house/ apartment.

WHAT activities did they do?

Eat out and dining



59%

Pubs clubs disco



30%

Visit national parks



27%

Bushwalks



24%

Go to the beach



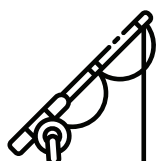
22%

Sightseeing



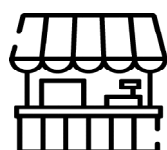
21%

Fishing



19%

Go to the markets



19%

Museums and art galleries



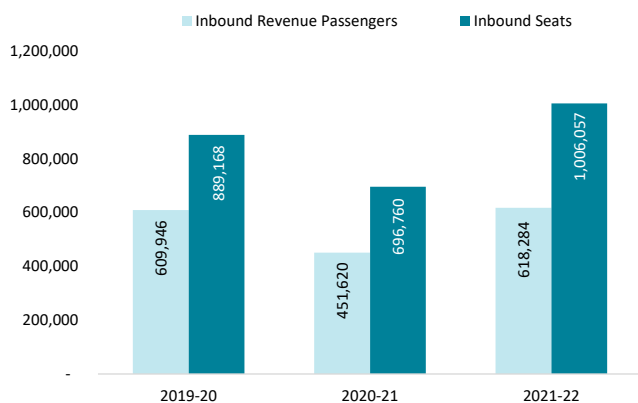
18%

Note: Activities include domestic overnight visitors only, for activities taken place in the NT.

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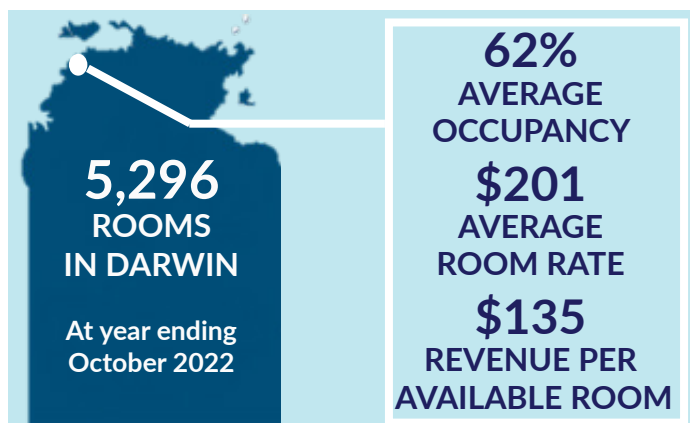
Industry sector news

Airport traffic data Darwin



Source: Bureau of Infrastructure, Transport and Regional Economics.

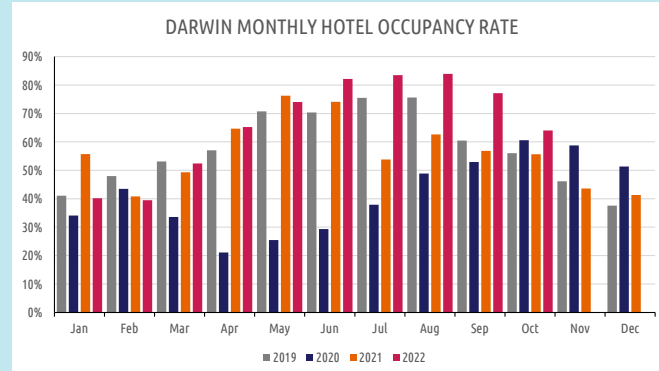
Darwin accommodation



Park visitation

Park	YE June 2021	YE June 2022	Change
Casuarina Coastal Reserve	1,276,000	1,513,000	19%
Darwin Botanical Gardens	475,000	400,000	-16%
Litchfield National Park	224,000	262,000	17%
Elsley National Park	218,000	209,000	-4.2%
Nitmiluk Gorge	156,000	196,000	26%
Berry Springs Nature Park	117,000	170,000	46%
Leliyn/ Edith Falls	99,000	128,000	29%
Howard Springs Nature Park	127,000	117,000	-8.2%
Charles Darwin Nature Park	82,000	82,000	-0.6%
Fogg Dam Conservation Reserve	50,000	56,000	12%
Gregory National Park	33,000	46,000	42%
Territory Wildlife Park	54,000	42,000	-22%
Mary River National Park	37,000	31,000	-17%

Source: NT Parks and Wildlife Commission.



Source: STR Destination Report from January 2019 to October 2022. Darwin hotel accommodation with 10+ rooms.

Note: When compared to YE October 2019 (pre-COVID), average occupancy went up +3.0 percentage points, average room rate went up +42% and revenue per available room went up +55%. Room supply went down 249 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.

TOP END Year Ending June 2022	Sample size	95% Confidence Interval	
		Visitors	Visitor nights
Intra-Territory	249	+/-16%	+/-28%
Interstate	169	+/-15%	+/-15%
International	np	np	np

np = not publishable