

Kakadu Arnhem Regional Report

Year Ending December 2017-19 (3 year average)

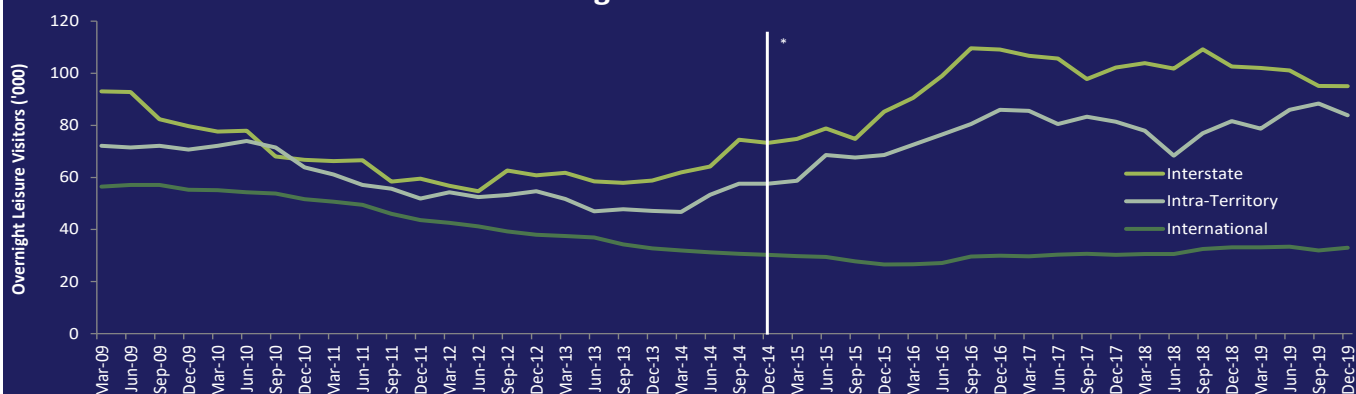


Visitor numbers in Kakadu Arnhem

Kakadu Arnhem Overnight	Intra-Territory	Interstate	Domestic	International	Total
Visitors	84,000	95,000	179,000	33,000	212,000
Visitor nights	242,000	511,000	753,000	126,000	879,000
ALOS (average length of stay, nights)	2.9	5.4	4.2	3.8	4.1
Expenditure*	-	-	\$151M	\$36M	\$187M
ASPT* (average spend per trip)	-	-	\$519	\$990	\$572

*Expenditure includes the Outer Darwin region.

Kakadu Arnhem Overnight Visitor Trend



* Change in methodology from 2014 - estimates are not comparable to previous years

Three Year Moving Average (Year Ending)

Region Definition

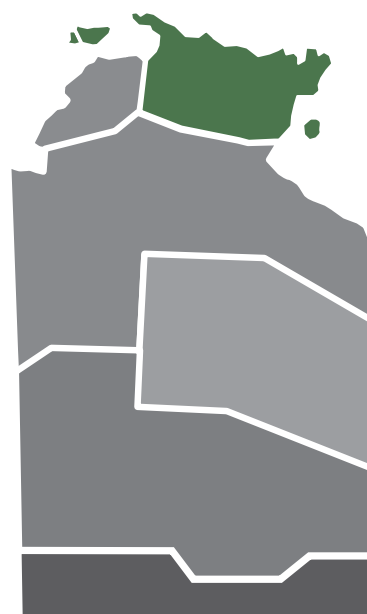
The regional boundaries of the Kakadu Arnhem tourism region are defined by the Australian Bureau of Statistics (ABS) Cat. No. 9503.0.55.001. For the purpose of this profile, these boundaries have been modified by Tourism Research Australia to not include Litchfield National Park.

What makes up the region:

Kakadu National Park, Jabiru, Maningrida, Nhulunbuy, Groote Eylandt and Tiwi Islands.

Source note:

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



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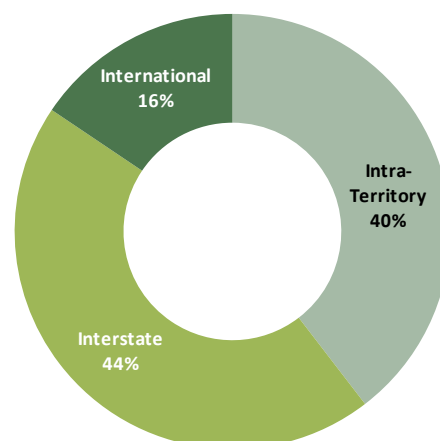
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WHERE do visitors come from and WHY?

Country of Origin	Visitors	Visitor nights	ALOS (nights)
International	33,000	126,000	3.8
Germany	6,000	16,000	2.9
France	3,000	11,000	3.4
USA	3,000	8,000	2.6
United Kingdom	3,000	15,000	5.6
Switzerland	3,000	6,000	2.3
New Zealand	2,000	8,000	3.9
Netherlands	2,000	10,000	4.7
Italy	2,000	4,000	1.9
Scandinavia	2,000	4,000	2.2
Canada	1,000	3,000	2.2

State of Origin	Visitors	Visitor nights	ALOS (nights)
Intra-Territory	84,000	242,000	2.9
Interstate	95,000	511,000	5.4
QLD	35,000	244,000	6.9
NSW	28,000	134,000	4.9
VIC	19,000	100,000	5.2
WA	8,000	14,000	1.8
SA	3,000	12,000	4.4
TAS	2,000	7,000	2.8

Kakadu Arnhem Source Markets

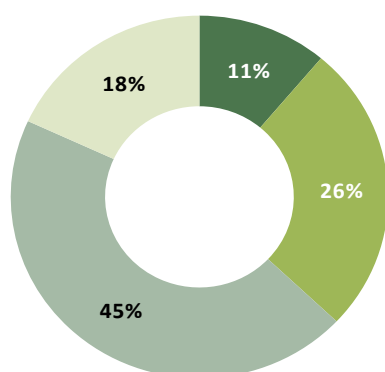


Purpose of Visit	Intra-Territory	Interstate	Domestic	International	Total
Holiday	24,000	52,000	76,000	32,000	108,000
Visiting friends and relatives	<1,000	6,000	6,000	1,000	7,000
Business	59,000	38,000	97,000	<1,000	97,000
Other reasons*	<1,000	-	<1,000	<1,000	<1,000

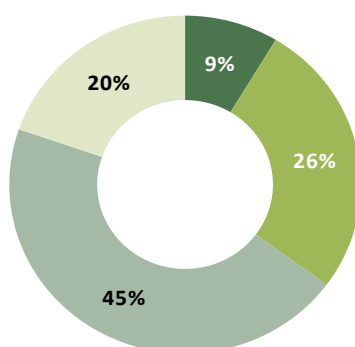
*Includes employment, education, other reason, no other reason and in transit.

WHAT time of year do visitors come?

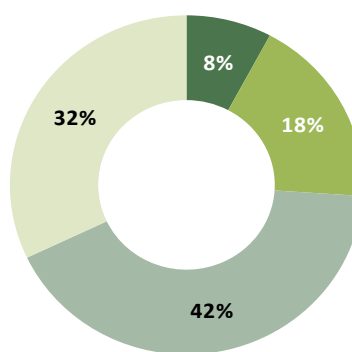
Interstate



Intra-Territory



International

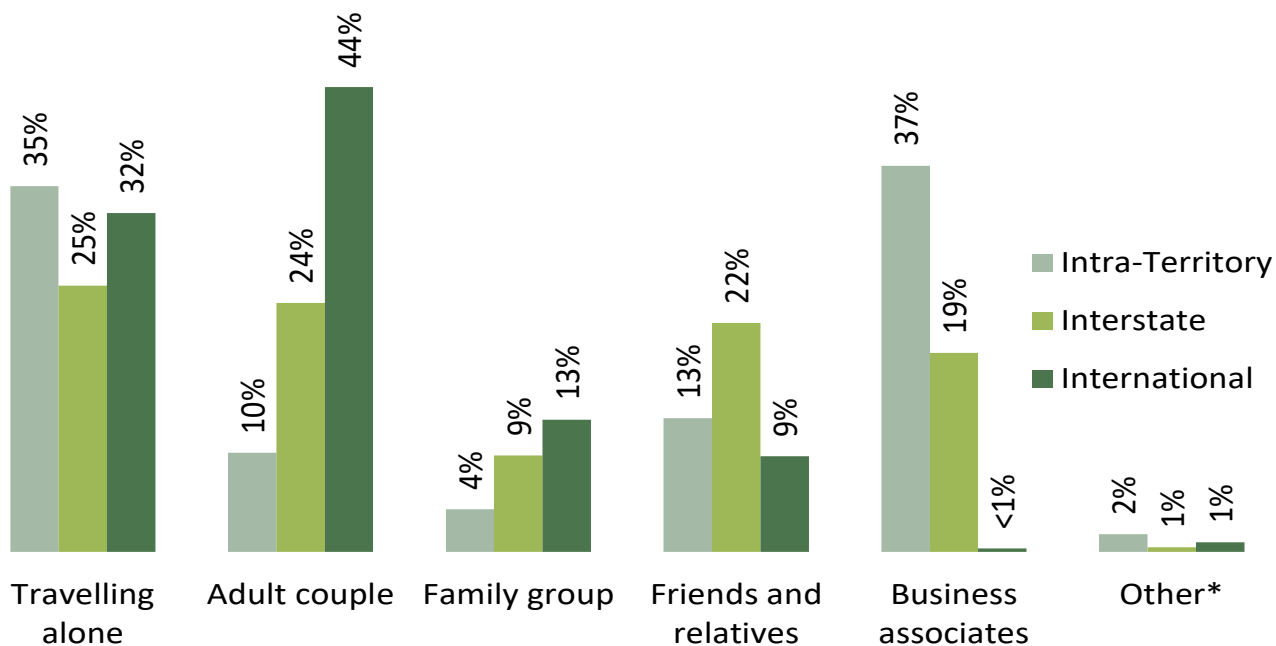


- March quarter
- June quarter
- September quarter
- December quarter

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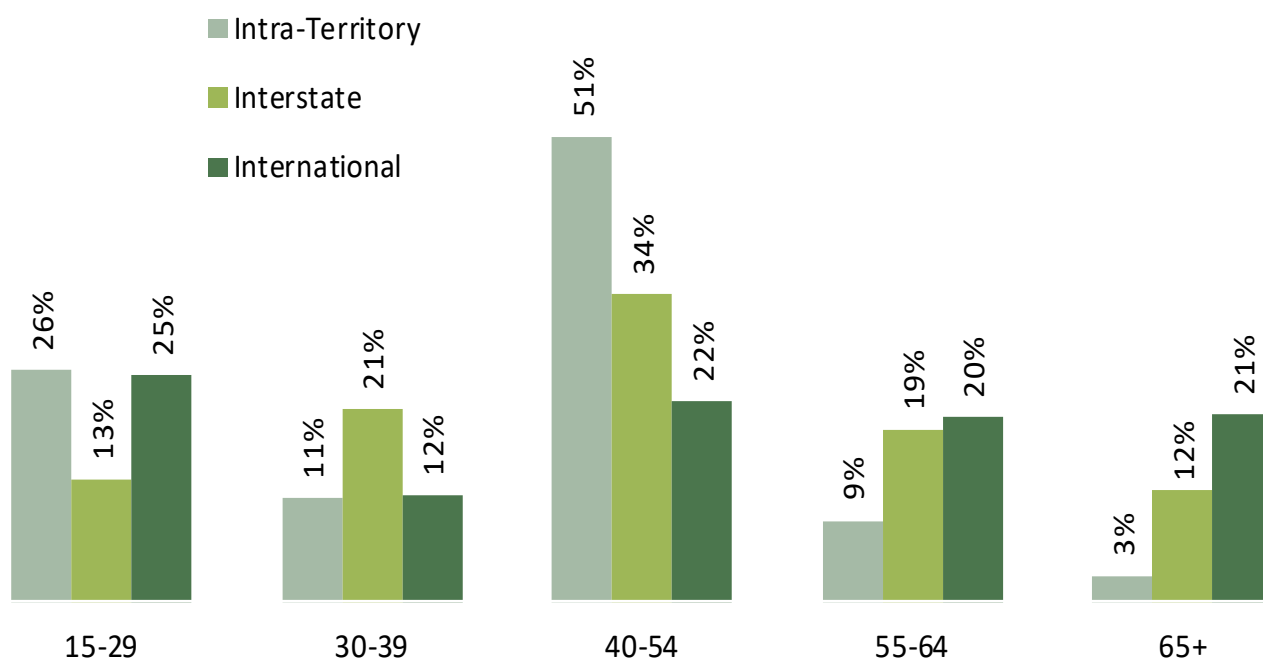
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WHO are our visitors travelling with?



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

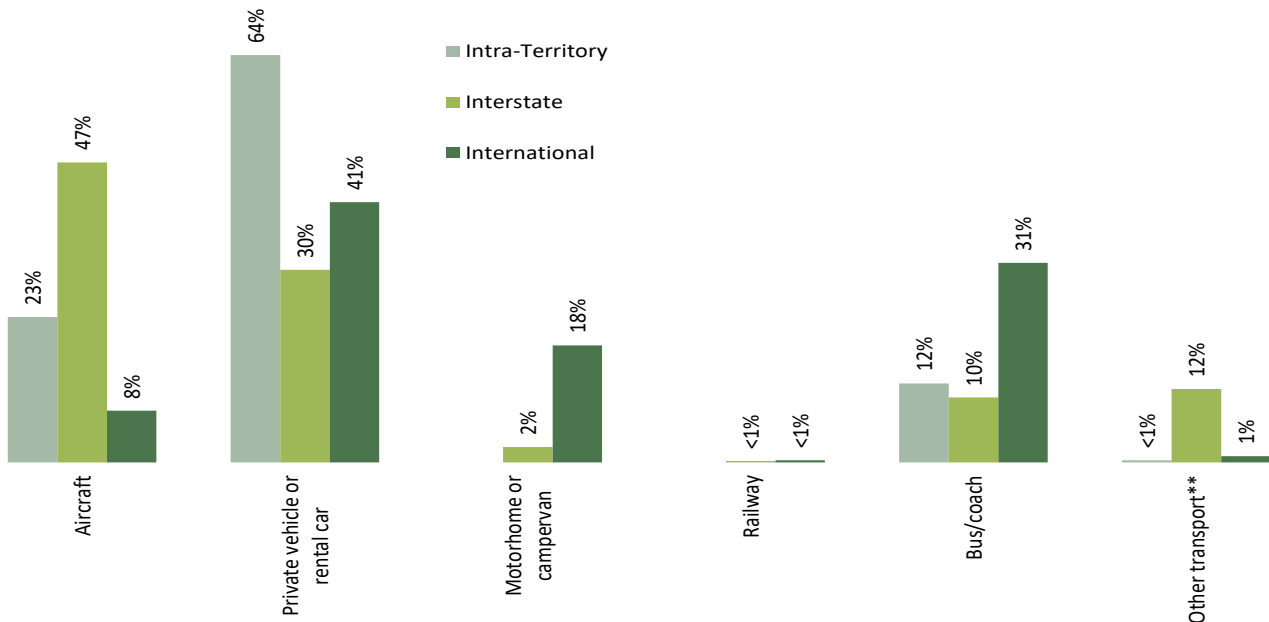
WHAT age are our visitors?



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WHAT transportation* did they use to get here and around?



*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.

WHERE else did they go in the Territory?

Dispersal	Greater Darwin	Katherine Daly	Barkly	Alice Springs MacDonnell	Lasseter
Intra-Territory	2,000	34,000	<1,000	<1,000	<1,000
Interstate	174,000	98,000	30,000	44,000	39,000
International	91,000	48,000	16,000	41,000	48,000

WHERE did they go in the Kakadu Arnhem region?

Statistical Area Level	Annual visit (3 year average)	Proportion of region
Alligator (SA2)	253,000	77%
East Arnhem (SA2)	14,000	4%
West Arnhem (SA2)	22,000	7%
Anindilyakwa (SA2)	np	np
Nhulunbuy (SA2)	np	np
Tiwi Islands (SA2)	np	np
Kakadu Arnhem Total	329,000	-

np = not publishable due to low sample size.



Image source: Australian Bureau of Statistics.

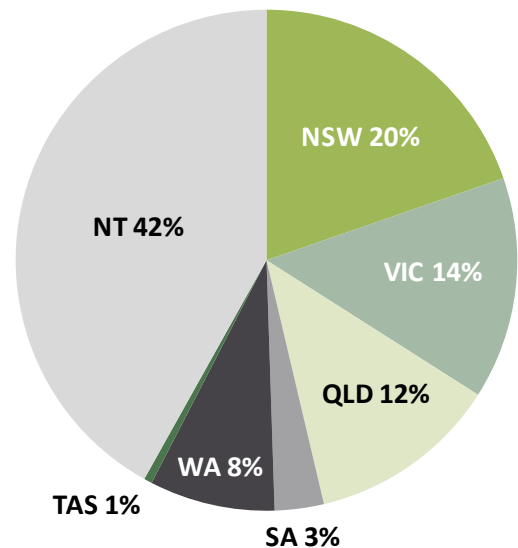
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The domestic leisure drive* market in focus

Domestic Leisure Drive	Intra-Territory	Interstate	Domestic
Visitors	22,000	31,000	53,000
Visitor nights	50,000	96,000	146,000
ALOS (nights)	2.3	3.1	2.8

Domestic Leisure Drive Source Market



Around 29% of all domestic visitors to the region over the three year period were leisure drive travellers, which is an average of 53,000 visitors per year.

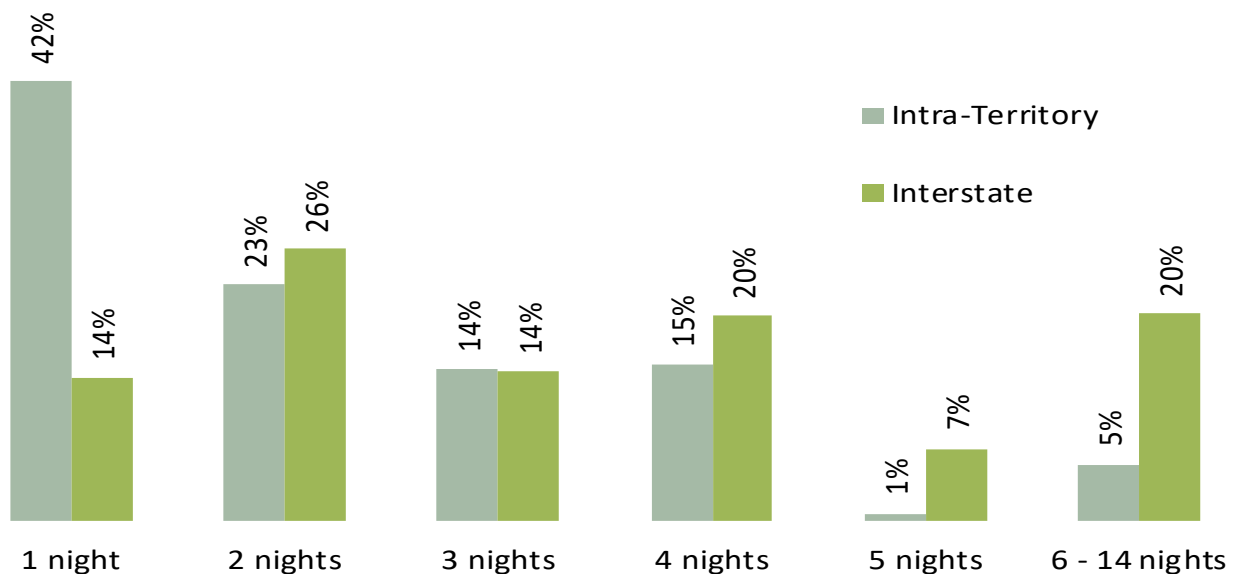
Domestic source markets

NT residents made up 42% of the domestic leisure drive market to the region. Visitors from New South Wales and Victoria were contributing a combined 34%.

Length of stay

Approximately 64% of the domestic leisure drive market stayed for three or less nights.

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.

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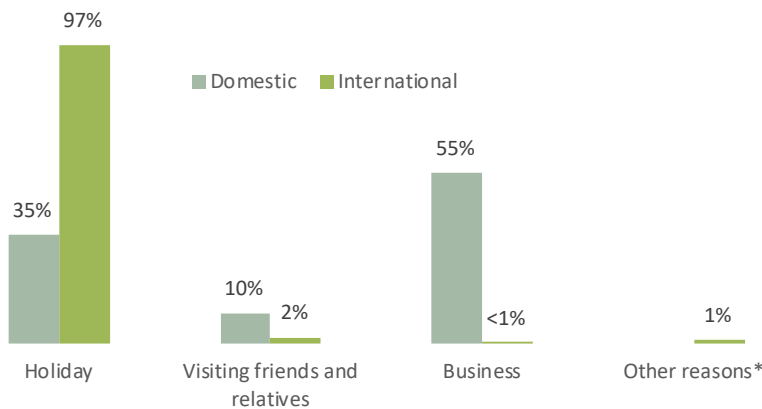
Youth visitation to the region

Youth	Domestic	International	Total
Visitors	37,000	8,000	45,000
Visitor nights	196,000	38,000	234,000
ALOS (nights)	5.3	4.6	5.1

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.

Figures in the table on the left are based on a five year average for Year Ending December 2015-19.

Youth Purpose of Visit



The youth market contributes just over a fifth (21%) of all visitors to the Kakadu Arnhem region. They also contribute just under a quarter (24% or 234,000 nights) of all nights in the region.

Domestic youth visitors make up the largest number of youth visitors to the region, representing over four fifths (82%) of the market. International youth make up 18% of the market and stay for a slightly shorter time on average than domestic youth.

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

Visitors interested in Aboriginal cultural experiences/participation

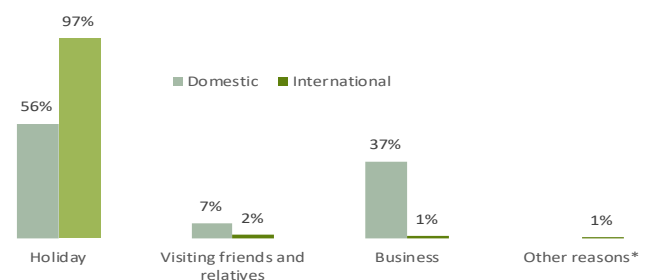
Aboriginal Culture	Domestic	International	Total
Visitors	57,000	28,000	85,000
Visitor nights	193,000	101,000	294,000
ALOS (nights)	3.4	3.6	3.5

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

Aboriginal culture is an important segment for those visiting the Kakadu Arnhem region, with 40% of 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, 97% of international visitors and 56% of domestic visitors who participated in Aboriginal cultural activities were on a holiday.

Aboriginal Culture Purpose of Visit



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

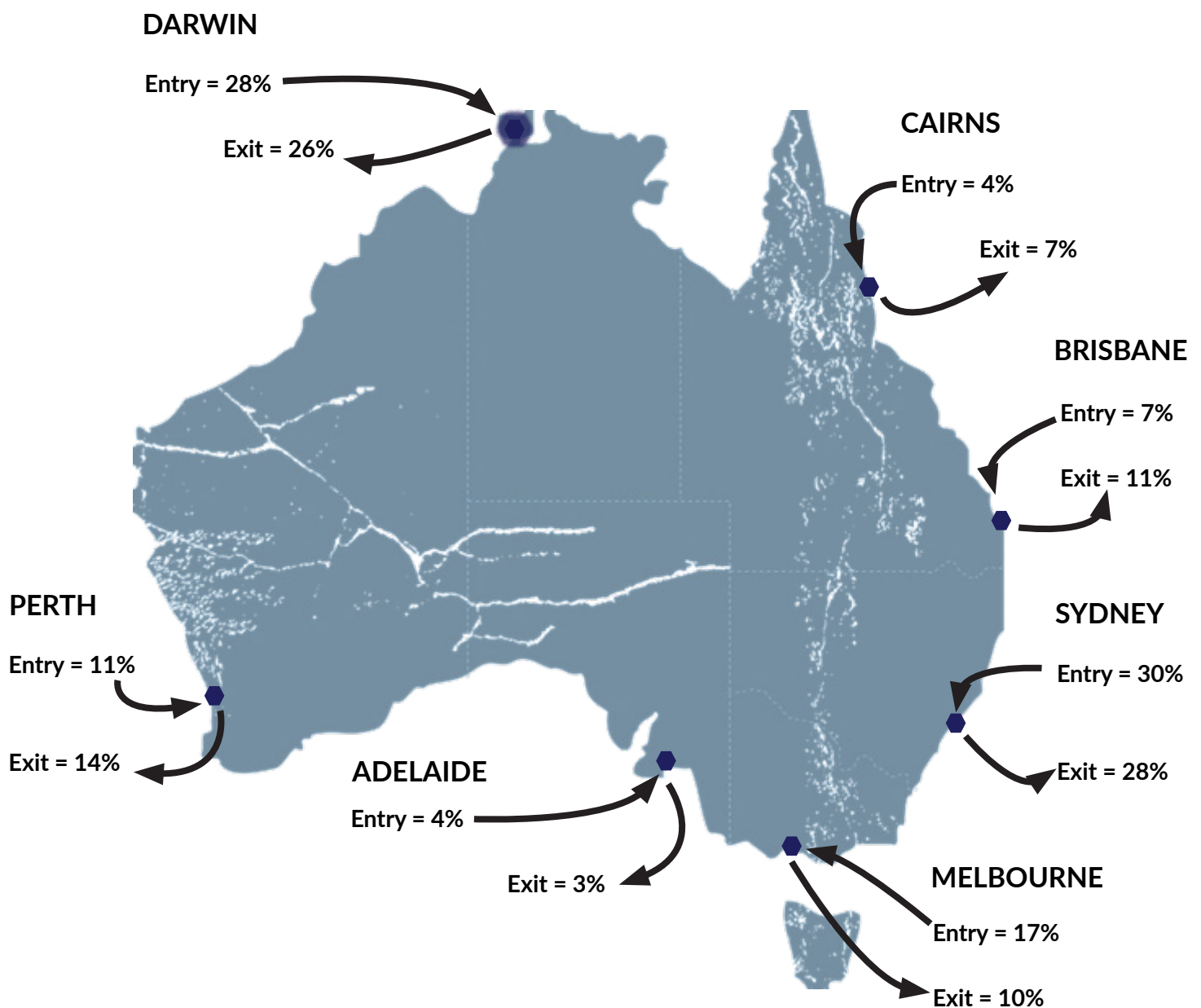
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HOW do internationals get here?

Over 50% of international visitors to the Kakadu Arnhem region arrived through the east coast ports of Sydney, Melbourne and Brisbane.

Ports of Entry/Exit by International Visitors who Visited Kakadu Arnhem Three Year Average, Year Ending December 2017-2019

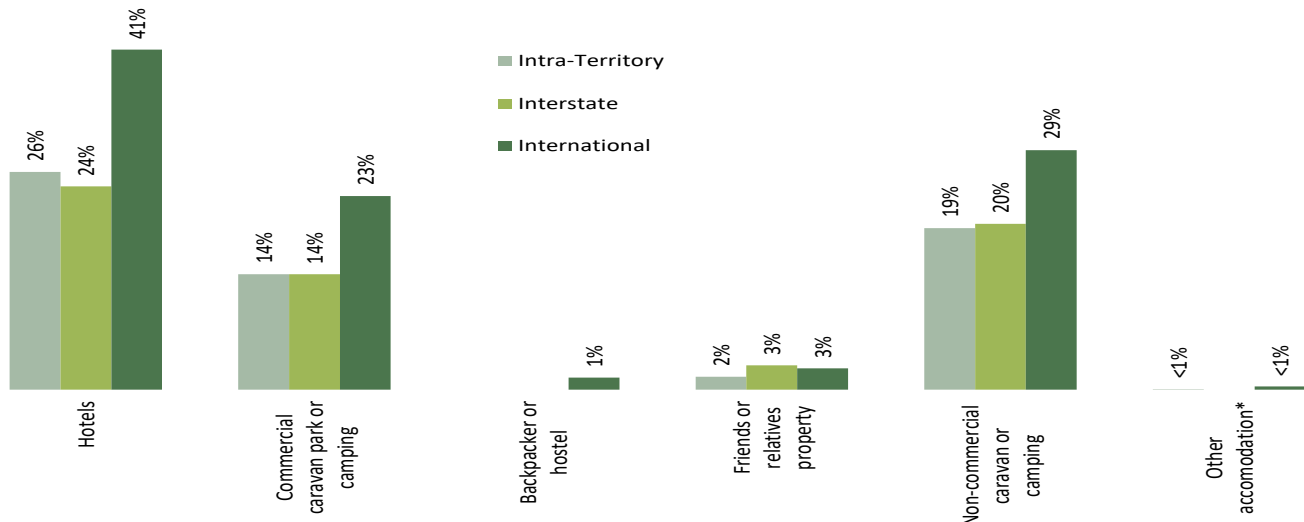


*Note: Other ports of entry and exit, including the Gold Coast, accounted for less than 1%.
East coast ports are defined as Sydney, Melbourne and Brisbane. Percentages may not add to 100% due to rounding.*

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WHERE did they stay?



*Includes guest house/ bed & breakfast, rented house/apartment/flat or unit, 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 any number of accommodation types.

WHAT activities did they do?

Aboriginal Art and Culture



Bushwalks



Charter Boat or Cruise



Eat Out and Dining



Fishing



Guided Tours



Shopping



Sightseeing



Visit National Parks



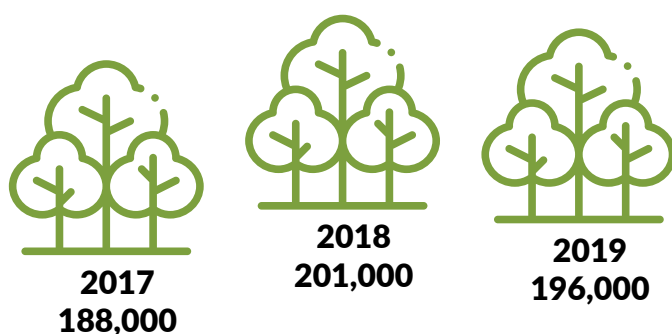
Note: Activities include both international and domestic overnight visitors. Activities reported for domestic visitors would have taken place in the NT, while activities for international visitors could have taken place anywhere within Australia (including the NT).

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Industry sector news

Kakadu National Park Visits Are Mixed

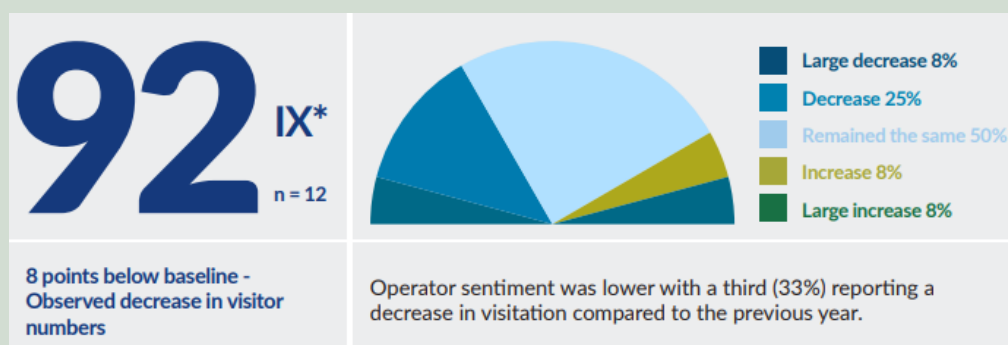


Source: Numbers provided above are based on visit estimates from Parks Australia.



Industry Sentiment for December Quarter in 2019 Indicates a Decrease in Visitation

Operator sentiment in regards to the number of visitors to their business was low for the December quarter 2019 compared to last year. Sentiment is sourced from an online poll conducted each quarter by Tourism NT and is designed to provide a corroborating source of information on visitation to the national surveys. A summary for the Top End is available on the Tourism NT website.



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".

More information on the surveys:

Visitor number, night 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 table below.

Year Ending December 2017-19	Sample size	95% Confidence Interval	
		Visitors	Visitor nights
Intra-Territory	138	+/-21%	+/-38%
Interstate	129	+/-20%	+/-26%
International	600	+/-10%	+/-42%

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.