

Katherine Daly Regional Report

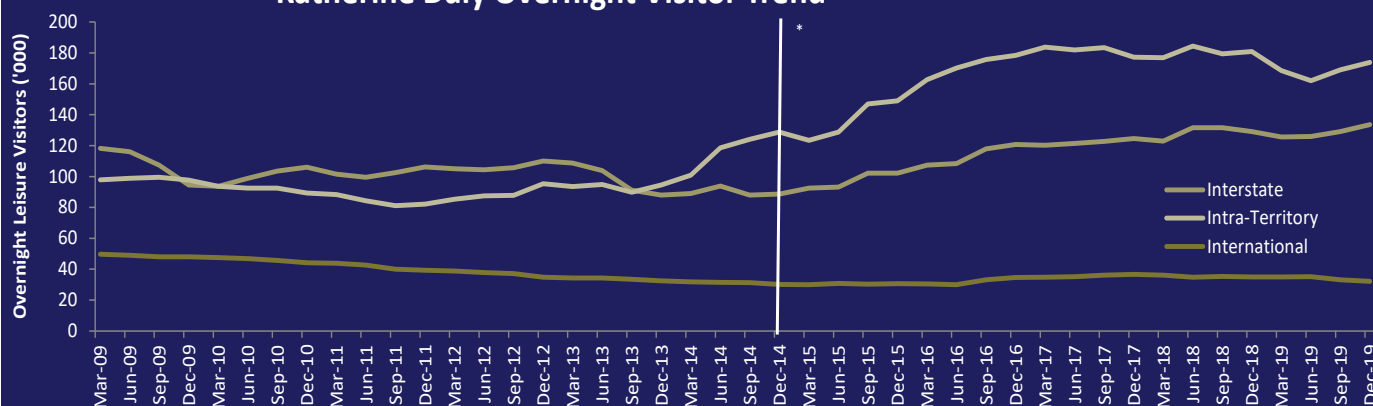
Year Ending December 2017-19 (3 year average)



Visitor numbers in Katherine Daly

Katherine Daly Overnight	Intra-Territory	Interstate	Domestic	International	Total
Visitors	174,000	134,000	308,000	32,000	340,000
Visitor nights	510,000	764,000	1,274,000	253,000	1,527,000
ALOS (average length of stay, nights)	2.9	5.7	4.1	7.9	4.5
Expenditure	-	-	\$166M	\$13M	\$179M
ASPT (average spend per trip)	-	-	\$541	\$416	\$529

Katherine Daly 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 Katherine Daly tourism region are defined by the Australian Bureau of Statistics (ABS) Cat. No. 9503.0.55.001.

What makes up the region:

Katherine, Daly Waters, Borroloola, Mataranka, Pine Creek and Wadey.

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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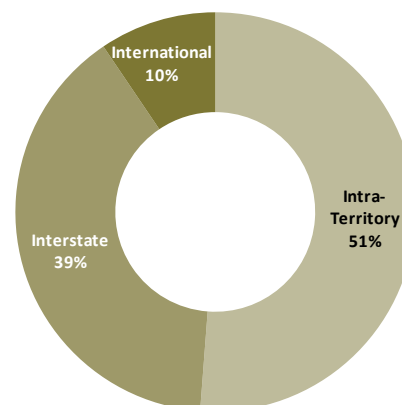
WHERE do visitors come from and WHY?

Country of Origin	Visitors	Visitor nights	ALOS (nights)
International	32,000	253,000	7.9
Germany	6,000	24,000	4.0
United Kingdom	4,000	13,000	3.5
France	3,000	21,000	6.3
Switzerland	3,000	8,000	2.8
Netherlands	2,000	5,000	2.5
New Zealand	2,000	14,000	8.7
USA	2,000	6,000	3.8
Italy	1,000	7,000	5.7
Canada	1,000	16,000	13.2
Scandinavia	1,000	17,000	16.9

State of Origin	Visitors	Visitor nights	ALOS (nights)
Intra-Territory	174,000	510,000	2.9
Interstate	134,000	764,000	5.7
NSW	40,000	171,000	4.2
QLD	32,000	247,000	7.7
VIC	28,000	182,000	6.5
WA	22,000	103,000	4.7
SA	8,000	51,000	6.2
TAS	2,000	7,000	3.1
ACT	1,000	4,000	5.0

Purpose of Visit	Intra-Territory	Interstate	Domestic	International	Total
Holiday	61,000	82,000	143,000	30,000	173,000
Visiting friends and relatives	9,000	13,000	22,000	<1,000	22,000
Business	99,000	29,000	128,000	1,000	129,000
Other reasons*	6,000	11,000	17,000	1,000	18,000

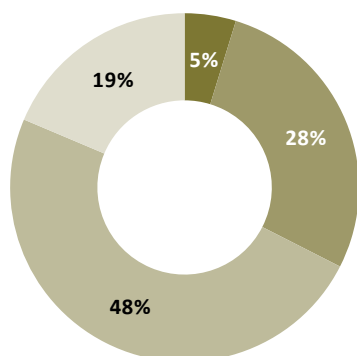
Katherine Daly Source Markets



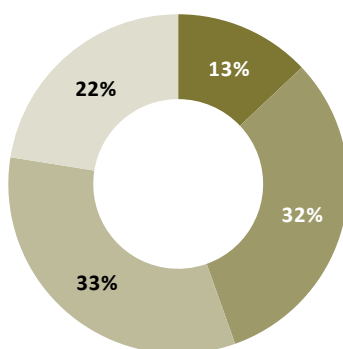
*Includes employment, education, other reason, no other reason and in transit.

WHAT time of year do visitors come?

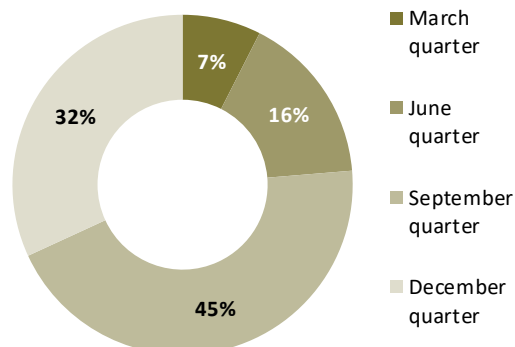
Interstate



Intra-Territory



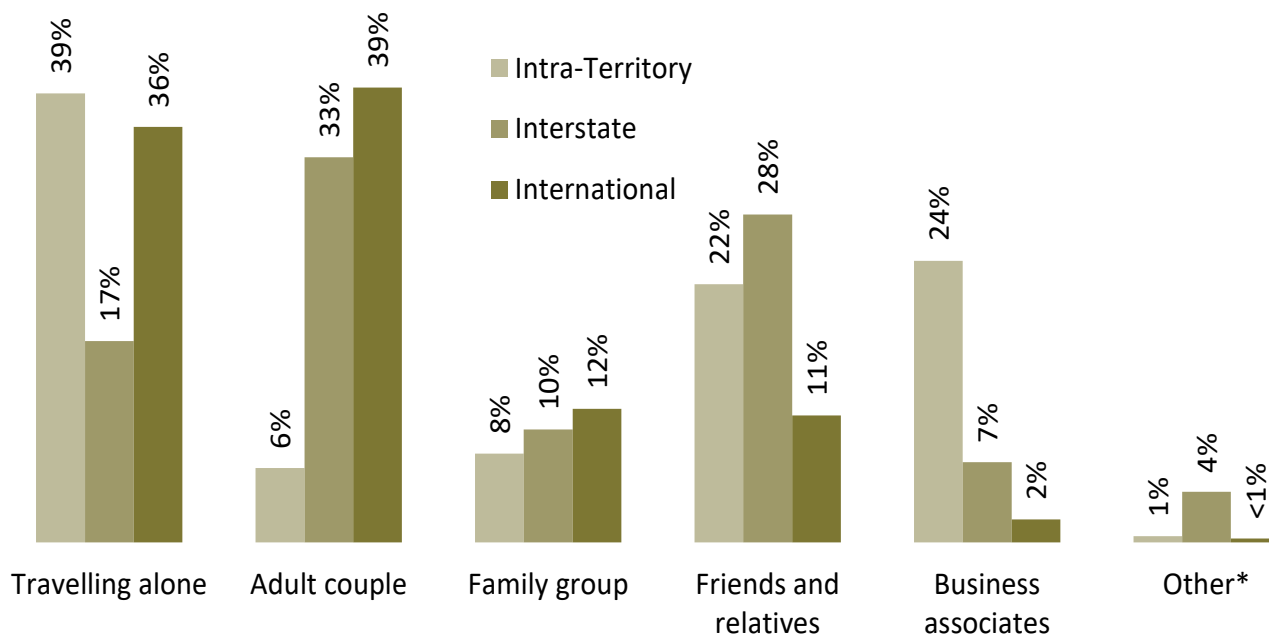
International



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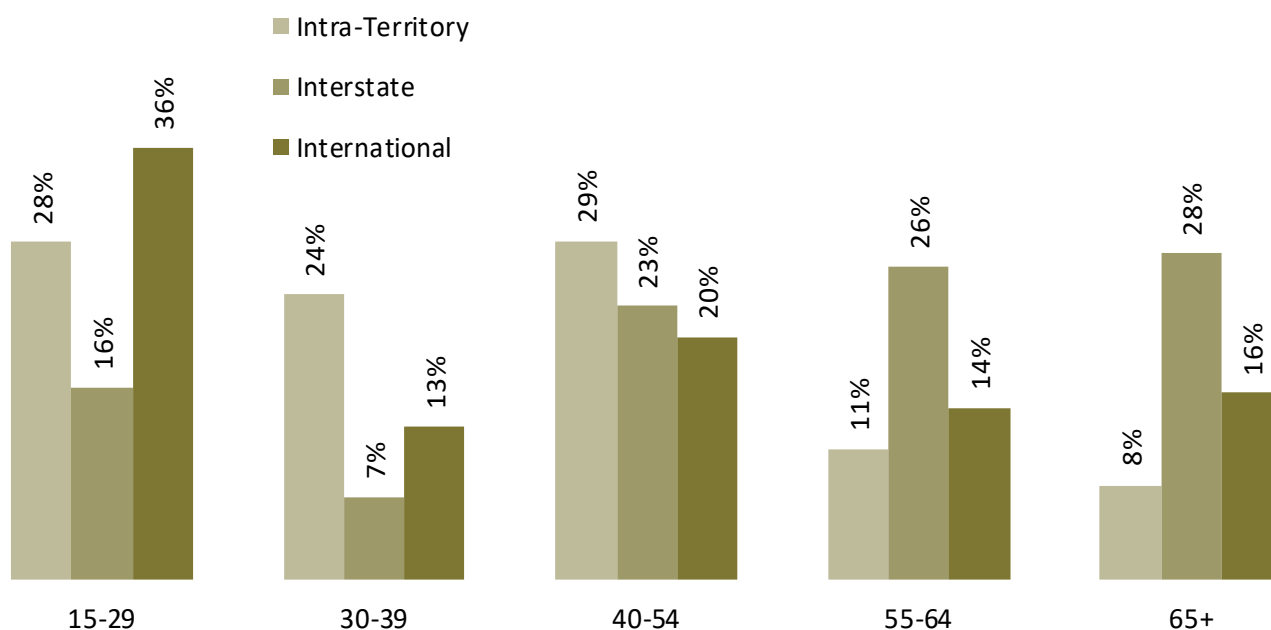
Year Ending December 2017-19 (3 year average)

WHO are our visitors travelling with?



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

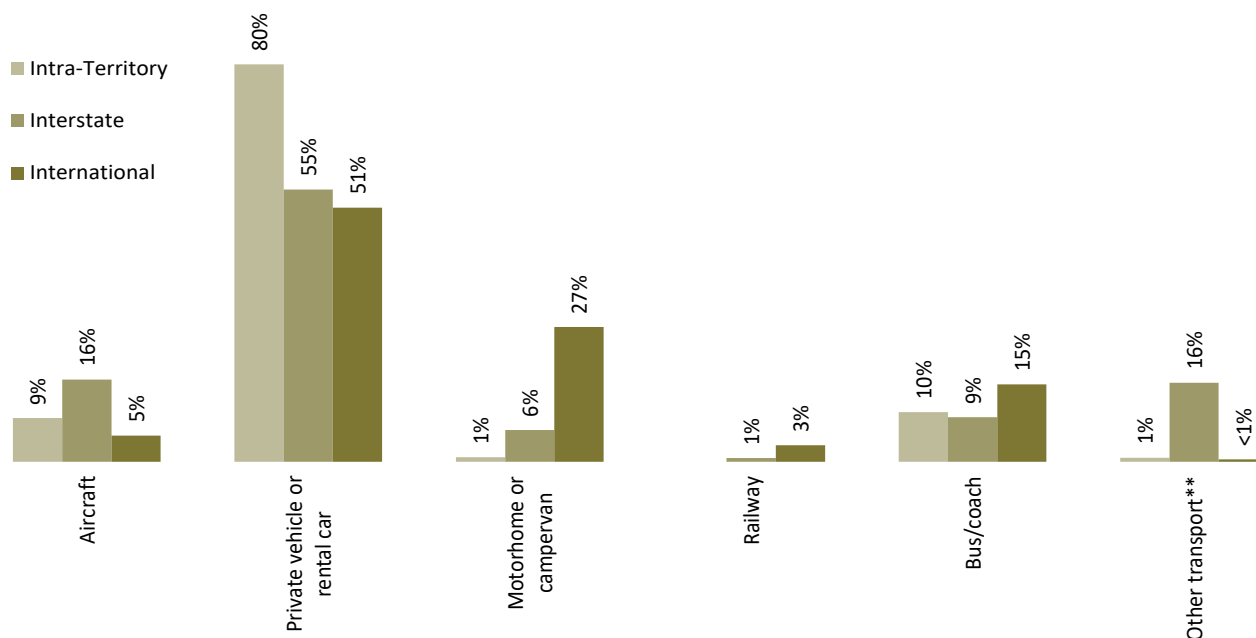
WHAT age are our visitors?



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Year Ending December 2017-19 (3 year average)

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	Kakadu Arnhem	Barkly	Alice Springs MacDonnell	Lasseter
Intra-Territory	13,000	34,000	28,000	18,000	7,000
Interstate	281,000	98,000	103,000	93,000	62,000
International	86,000	48,000	31,000	45,000	41,000

WHERE did they go in the Katherine Daly region?

Statistical Area Level	Annual visit (3 year average)	Proportion of region
Katherine (SA2)	180,000	53%
Eley (SA2)	79,000	23%
Daly - Thamarrurr [SA2 group]	68,000	20%
Victoria River (SA2)	57,000	17%
Gulf (SA2)	35,000	10%
Katherine Daly Total	340,000	-



Image source: Australian Bureau of Statistics.

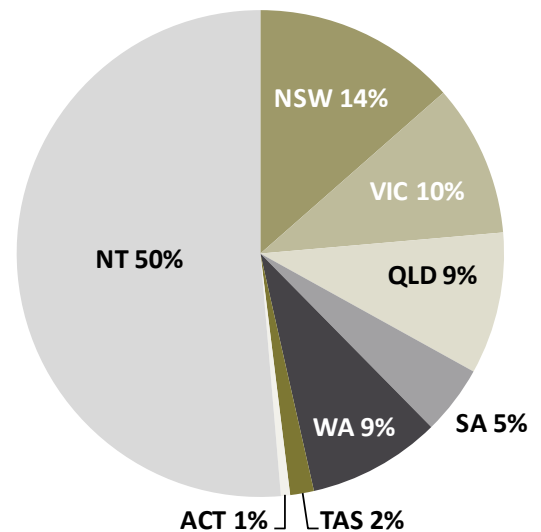
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Year Ending December 2017-19 (3 year average)

The domestic leisure drive* market in focus

Domestic Leisure Drive	Intra-Territory	Interstate	Domestic
Visitors	68,000	64,000	132,000
Visitor nights	134,000	259,000	393,000
ALOS (nights)	2.0	4.0	3.0

Domestic Leisure Drive Source Market



Around 43% of all domestic visitors to the region over the three year period were leisure drive travellers, which is an average of 132,000 visitors per year.

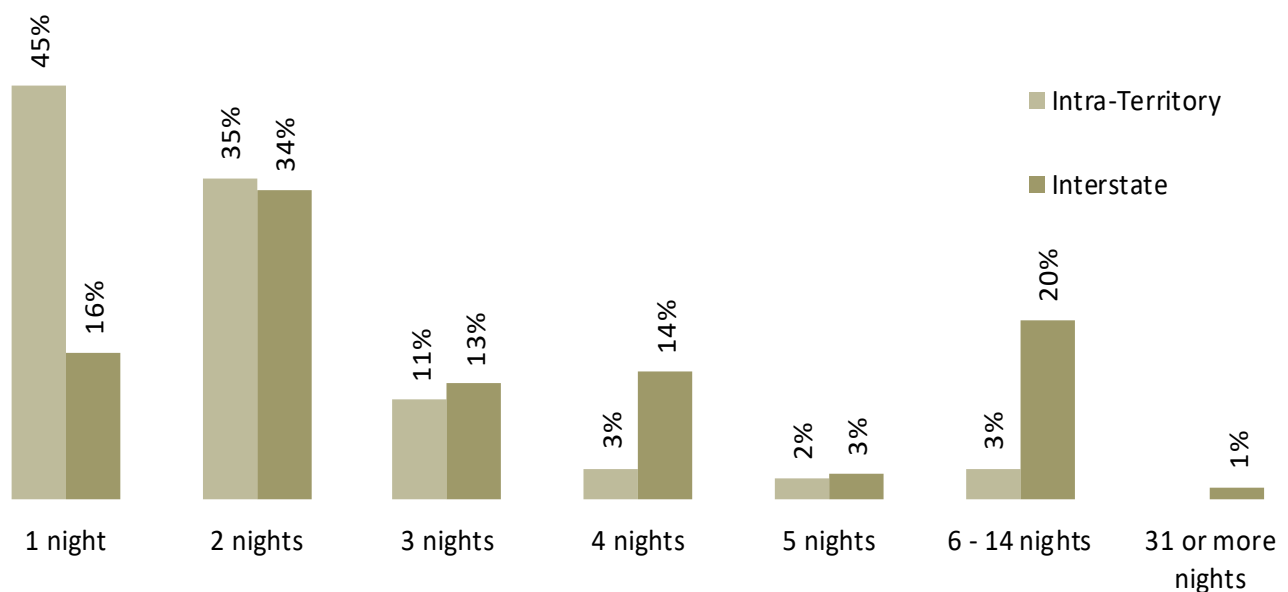
Domestic source markets

NT residents made up 50% of the domestic leisure drive market to the region. Visitors from New South Wales and Victoria were contributing a combined 24%.

Length of stay

Approximately 77% 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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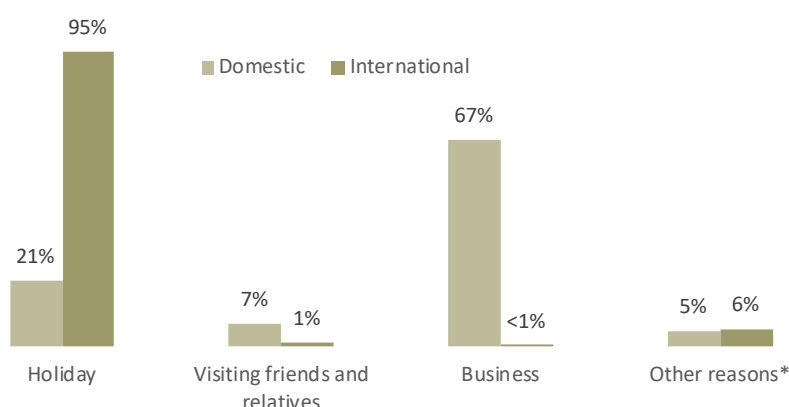
Youth visitation to the region

Youth	Domestic	International	Total
Visitors	59,000	12,000	71,000
Visitor nights	227,000	132,000	359,000
ALOS (nights)	3.8	10.6	5.0

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 Katherine Daly region. They also contribute a quarter (25% or 359,000 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 (83%) of the market. International youth make up 17% of the market, however stay almost three times as long as 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	31,000	24,000	55,000
Visitor nights	103,000	115,000	218,000
ALOS (nights)	3.4	4.8	4.0

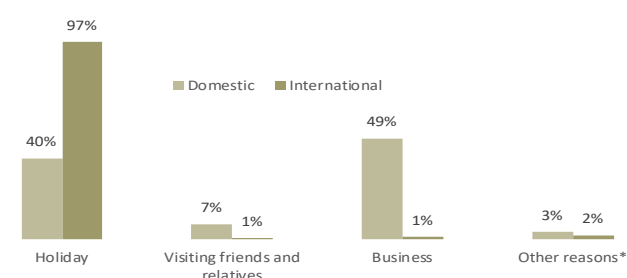
Domestic Aboriginal cultural experiences include: experience Aboriginal art/ craft and cultural displays, and visit an Aboriginal site/ community. International Aboriginal cultural experiences include: experience Aboriginal art/ craft and cultural displays, visit an Aboriginal site/ community, and attend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

*Caution required when interpreting results due to low sample size.

Aboriginal culture is a niche segment for those visiting the Katherine Daly region, with 16% of visitors participating in these activities.

The majority of international visitors who were interested in Aboriginal culture were in the region for the purpose of a holiday (97%). However, the majority of domestic visitors who participated in Aboriginal cultural activities were on a business trip (49%).

Aboriginal Culture Purpose of Visit



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

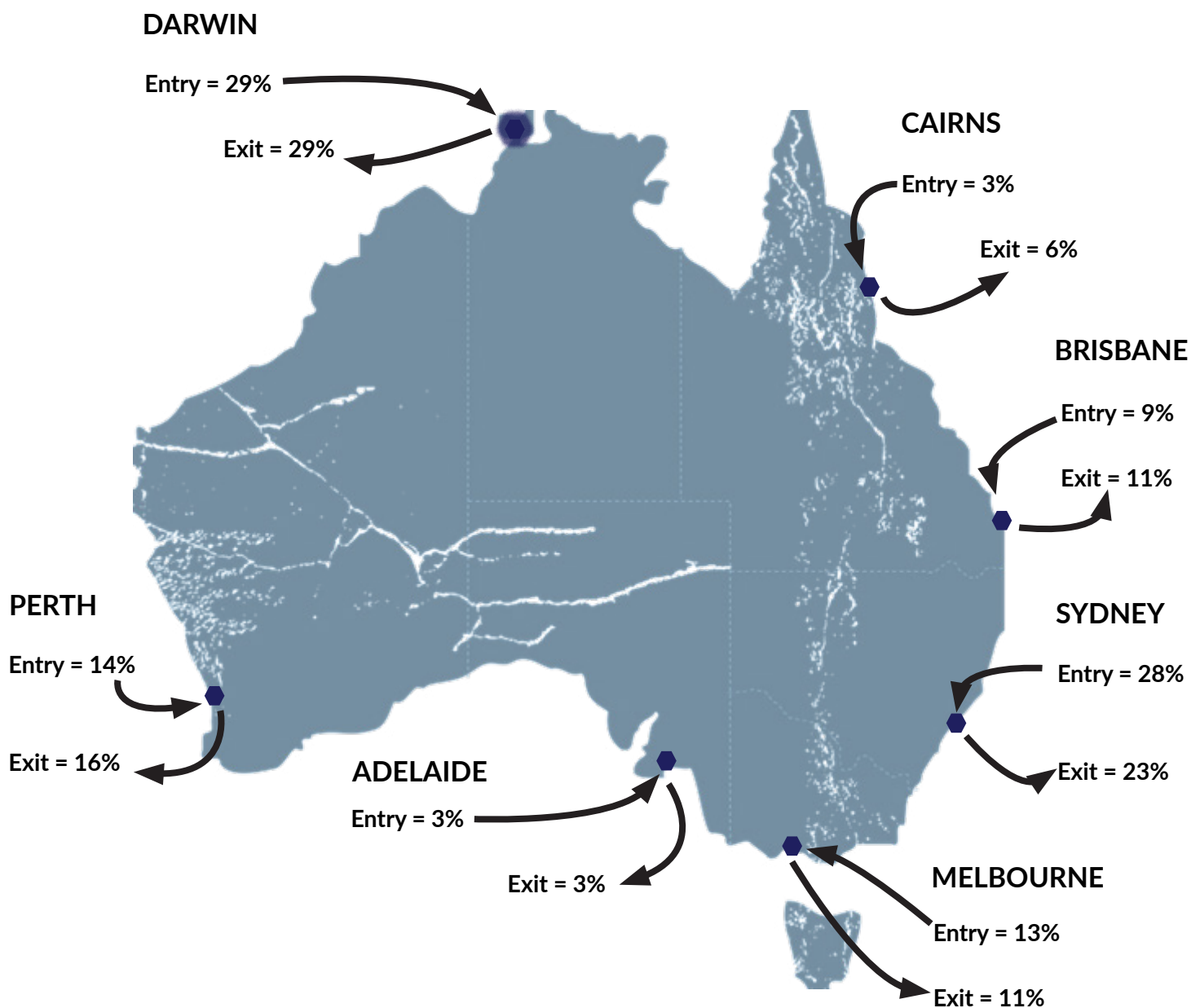
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Year Ending December 2017-19 (3 year average)

HOW do internationals get here?

50% of international visitors to the Katherine Daly region arrived through the east coast ports of Sydney, Melbourne and Brisbane.

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

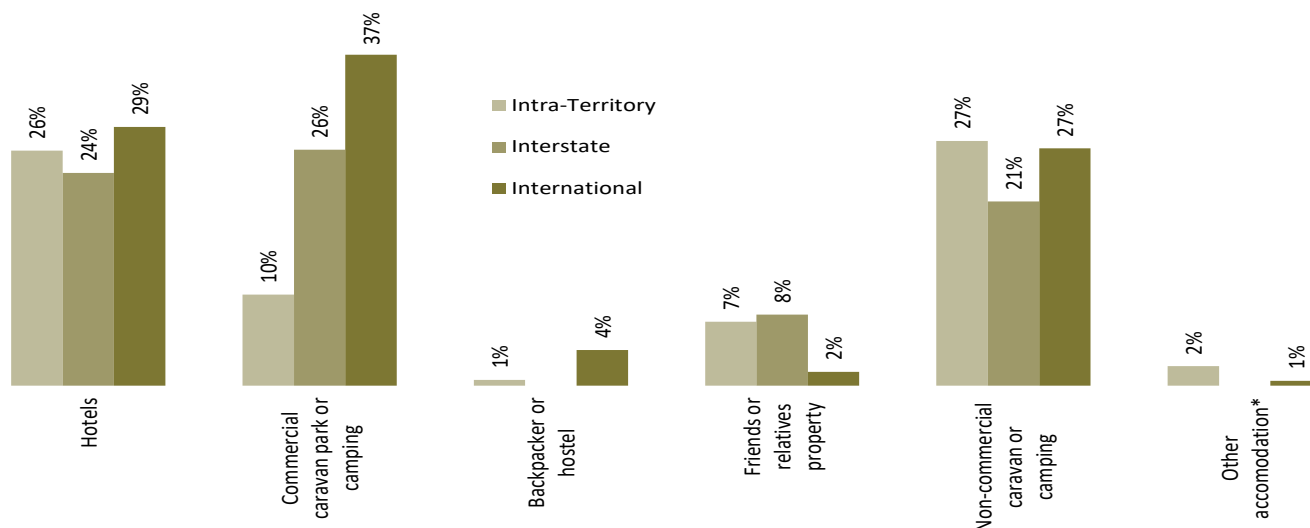


*Note: Other ports of entry and exit, including the Gold Coast, accounted for less than 1%.
East coast ports are defined as Sydney, Melbourne and Brisbane. Percentages may not add to 100% due to rounding.*

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Year Ending December 2017-19 (3 year average)

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 of accommodation types.

WHAT activities did they do?

Aboriginal Art and Culture



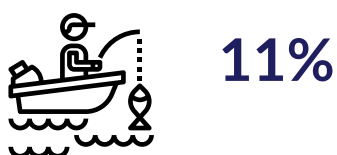
Bushwalks



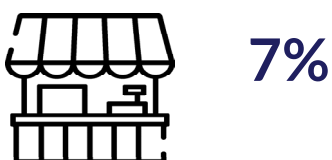
Eat Out and Dining



Fishing



Markets



Pubs Clubs Disco



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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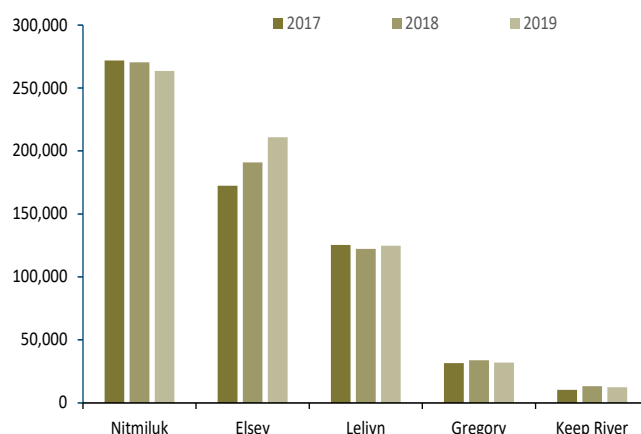
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Industry sector news

Park Visitation

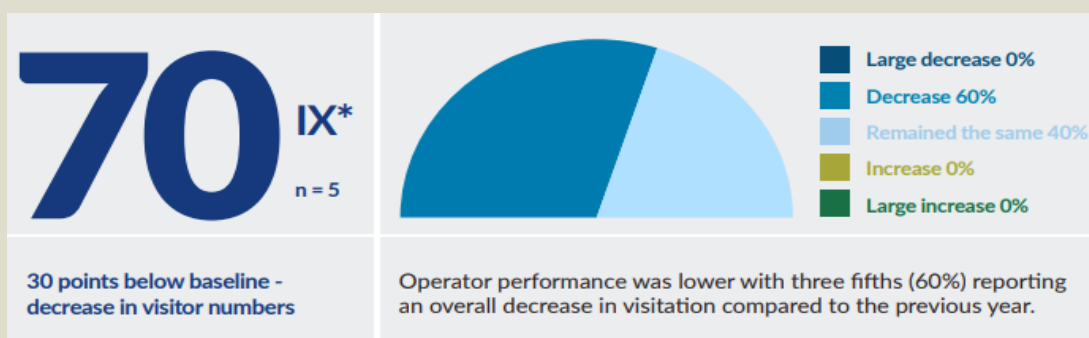
Year Ending December 2019	Visitors
Nitmiluk National Park	271,000
Eley National Park	218,000
Leliyn (Edith Falls)	123,000
Gregory National Park	35,000
Keep River National Park	13,000

Source: NT Parks and Wildlife Commission.



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	343	+/-15%	+/-26%
Interstate	203	+/-17%	+/-21%
International	706	+/-10%	+/-30%

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.