



# Destination Visitor Survey Strategic Regional Research – Northern Territory

## Dispersing Beyond Darwin

### Introduction

Darwin has traditionally been used as a base for visitors to experience the natural and cultural experiences on offer in the surrounding regions. However, anecdotal evidence suggests Darwin is increasingly becoming more of a destination in its own right, with more visitors travelling to Darwin directly without dispersing to the attractions in surrounding regions. This has coincided with a broader trend for visitors to take more frequent but shorter holidays and an increase in fly-in holidays (with low cost carriers), bringing in a different type of visitor to Darwin.

Destinations in the Top End that visitors traditionally disperse to from Darwin include some of Australia's greatest natural and cultural attractions such as Kakadu National Park (one of Australia's National Landscapes), Nitmiluk National Park and Litchfield National Park. Many of the activities and tours in the area showcase these attractions to domestic and international visitors.

This study was undertaken by TNS on behalf of Tourism Research Australia and Tourism NT. The objective was to gain a better understanding of the behaviour of visitors to and around Darwin including the motivations and barriers for dispersal beyond Darwin. The results will be used to develop strategic recommendations to grow visitor dispersal within the Top End.

### Research Approach

This study was conducted quantitatively in two phases to capture the impact of seasonality. The first phase was conducted in the shoulder season during April/May 2011 (n=302), with the second phase conducted in the peak period during August 2011 (n=302). In total, 604 face-to-face interviews were conducted with visitors in a range of locations in and around Darwin. Each interview was 15 minutes with respondents needing to meet the following requirements:

- visiting the Darwin/Top End region for leisure purposes (including visiting friends and relatives)
- not just arrived in Darwin (e.g. had some opportunity to experience the area)
- not there to watch or compete in the Arafura Games (shoulder season only)
- flown in and/or out of Darwin (visitors travelling by road/rail only were excluded).

The Top End region was defined using a map showing an area from Kakadu to Daly River, and down to Katherine/Nitmiluk National Park.



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Quotas were placed on:

- origin
  - domestic visitors (maximum n=210 per wave)
  - overseas visitors (maximum n=90 per wave)
- dispersal type
  - visited Darwin only
  - visited Darwin and took day trips to the Top End region
  - visited Darwin and took overnight trips to the Top End region (minimum n=75 per stage for each trip type).

Six telephone follow-up in-depth interviews were also conducted to add richer insights to the quantitative findings.

## Participant Characteristics

There was a relatively even distribution between visitor dispersal types with little variation in dispersal patterns between the shoulder and peak seasons. Across both stages:

- 35% stayed in Darwin only
- 35% dispersed to the Top End region on a day trip
- 30% dispersed to the Top End region on an overnight trip.

Key characteristics of visitors included:

- 59% of visitors were on their first trip to Darwin
- 69% of visitors were domestic travellers and 31% were from overseas
- 60% of visitors were Experiential Travellers<sup>1</sup>
- 37% of visitors were 18-34 years, 37% were 35-54 years and 28% were 55 years and over
- overseas visitors tended to be younger (65% were 18-34 years) than domestic visitors (24% were 18-34 years)
- those dispersing beyond Darwin were likely to be older than those not dispersing (35% of those 55 years and over dispersed overnight compared with 28% of 18-34 year olds).

## Key Findings

### Differences between dispersal types

Some key differences emerged in the profiles of the different dispersal groups:

- Those visiting Darwin only were more likely to be domestic visitors (83%), 18-54 years (78%), and were more likely to have children living at home (41%) and be visiting friends and relatives (41%) than visitors who dispersed.
- Visitors dispersing on a day trip were less likely to have children at home (25%) than non-dispersers. About 71% were 18-54 years and 20% were visiting friends and relatives. They spent the longest amount of time in Darwin, and for those taking multiple day trips a 'rest' day in Darwin in between trips was often taken.
- Visitors dispersing overnight were the most likely of the dispersal types to be from overseas (44%) and the least likely to have children at home (22%). About a third (32%) were 55 years and over while only 18% were visiting friends and relatives.

### Dispersal behaviour

More nights were spent in Darwin (6.4 nights on average) than anywhere else in the Top End region (3.3 nights on average). This reflects Darwin's position as a hub for this market.

Kakadu National Park and Litchfield National Park were the primary drawcards for dispersing from Darwin.

- Kakadu National Park/Jabiru was the most popular destination with 41% of visitors dispersing there – 63% of these visited on an overnight trip.
- Litchfield National Park was the second most popular destination with 35% of visitors dispersing there – 65% of these visited as a day trip.

<sup>1</sup> Experiential Travellers are Tourism NT's target market. Experiential Travellers seek authentic holidays that provide them with a sense of personal enrichment.

- Nitmiluk National Park was also a popular destination with 18% dispersing there – 76% of these visited as a day trip.

Qualitative feedback, as well as quantitative satisfaction scores, indicated that in hindsight some visitors to Kakadu National Park on a daytrip felt that an overnight trip would have been better due to the long travel time to the region.

Around two fifths of visitors hired a vehicle and of those:

- 38% visited Darwin only
- 41% dispersed to Litchfield National Park
- 38% dispersed to Kakadu National Park.

Bus/coach tours were also popular for accessing Kakadu National Park (52%), particularly amongst overseas visitors (57%) and Non-Experiential Travellers (61%).

In terms of booking their trip:

- Three quarters of visitors (76%) booked either part of their trip or their entire trip in advance.
- Accommodation was the item most frequently booked in advance (82%), followed by onward transport such as flights out of Darwin (55%).
- The internet was often used to book these items either direct with the supplier (43%) or via third party websites (30%).
- About 29% of visitors booked in person through a travel agent or visitor information centre.
- About 15% of visitors booked tours in advance.

### **Dispersal motivations**

Kakadu National Park was a key motivator for visiting Darwin and the Top End region in both the shoulder and peak seasons:

- Almost one third (31%) of all visitors gave Kakadu National Park as a reason for visiting Darwin and the Top End region.
- This proportion was higher for Experiential Travellers, with 49% of Experiential Travellers visiting Darwin and the Top End region because of Kakadu National Park.

Other motivations for visiting the region included:

- always wanted to visit Darwin and the Top End region (29% of visitors)
- visiting friends and family living there (27%).

The weather was also a key drawcard in the peak season (20% compared with 12% in the shoulder season) with Darwin being seen as a good place for a winter break/to get away from the cold.

As well as being a key motivator to visiting Darwin and the Top End region, friends and family ranked highest as a key source of information when planning the trip (49%). The qualitative phase found that hotel staff and brochures/leaflets in hotels were also useful information sources.

### **Barriers to dispersal**

There were a number of barriers provided for not dispersing beyond Darwin:

- Not having enough time to go elsewhere was the main barrier given for both Darwin-only visitors (49%) and those who only took a day trip to the Top End region (36%). However, given the fact that visitors on average spent 6.4 nights in Darwin, other factors may have also played a role such as having enough to do in Darwin.
- Visiting friends and relatives was also a barrier to dispersing for Darwin-only visitors (36%).

Other barriers to dispersal for those who only took day trips in the Top End region included:

- their accommodation in Darwin was booked in advance (19%) – this was specifically an issue in the peak season when hotels were much busier (28% compared with 10% in the shoulder season)
- overnight tours were felt not to represent good value for money (18%) – this was particularly the case in the shoulder season
- day trips were recommended rather than overnight trips (18%)
- they opted to spend their time with friends and family they were visiting (16%).

## Activities while in Darwin and the Top End region

A range of activities were undertaken and a variety of attractions visited across the two seasons. The top five activities in both seasons were:

- eating out at restaurants (67% shoulder season; 63% peak season)
- shopping (66%; 55%)
- a harbour cruise (23%; 25%)
- a nature walk (21%; 19%)
- swimming in a waterhole/waterfall (14%; 18%).

The top five most visited attractions in both seasons were:

- Mindil Beach markets (44%; 56%)
- Darwin Waterfront Precinct (33%; 61%)
- Crocosaurus Cove (37%; 49%)
- Museum and Art Gallery (43%; 37%)
- Military Museum (41%; 29%).

There were key differences between seasons for the top activities and attractions. Shopping was more popular in the shoulder season, as was the Museum and Art Gallery and the Military Museum; whereas visiting the Mindil Beach Markets, the Darwin Waterfront Precinct and swimming in a waterhole/waterfall were more popular in the peak season.

## Satisfaction and perceptions of Darwin

Spontaneous perceptions of Darwin tended to be very positive. Key associations with Darwin and the Top End region were the wildlife such as crocodiles (42%), the hot and steamy weather (32%) and Kakadu National Park (28%).

There were significant differences in how Darwin was perceived and how the Top End region as a whole was perceived.

- The Top End region was more likely to be seen as a destination for a longer trip (90%), to see wildlife in its natural habitat (90%) and to get close to nature (85%).
- Darwin was more likely to be seen as a destination to relax and recharge (79%) and as a destination for a short break/getaway (73%).

There was little difference in the perceptions of Darwin between those who dispersed or not. In contrast perceptions of the Top End region were significantly stronger amongst those who did disperse for day or overnight trips, which reflects higher levels of knowledge about the destination. For example, of the visitors who stayed in Darwin 70% associated the Top End region with adventure. This is compared with 93% of those who took an overnight trip.

Overall satisfaction with Darwin and the Top End region was very high. More than seven in ten visitors were *very satisfied* with Darwin (71%), Kakadu National Park/Jabiru (71%) and Litchfield National Park (72%). In terms of specific attributes:

- 76% of visitors to Darwin were *very satisfied* with the variety of things to see and do compared with 72% of visitors to the Top End region
- 66% of visitors to Darwin were *very satisfied* with the friendliness of locals compared with 65% of visitors to the Top End region
- 57% of visitors to Darwin were *very satisfied* with the local atmosphere compared with 62% of visitors to the Top End region
- 48% of visitors to Darwin were *very satisfied* with the personal security/safety compared with 56% of visitors to the Top End region
- 18% of visitors to Darwin were *very satisfied* with value for money compared with 32% of visitors to the Top End region.

There was also high positive sentiment towards Darwin with four in five visitors (81%) *very likely* to recommend it as a holiday destination while 28% were *very likely* to re-visit Darwin in the next three years. A quarter (26%) of visitors were *very likely* to travel beyond Darwin if they returned, a figure driven by those who visited Darwin only on this trip (33%) and domestic visitors (30%).

## Recommendations

- Darwin as a unique destination presents an opportunity for visitors to relax, recharge, enjoy the variety of things on offer in the city, and serves as an introduction to the Top End region.
- Visitors to the Top End region who stay in Darwin their entire trip are the most likely to revisit and the most likely to disperse next time they visit.
- With two fifths of those visiting Darwin only (in both the shoulder and peak seasons) motivated by visiting friends and relatives, opportunity exists to influence local residents to encourage their visitors to disperse beyond Darwin. These hosts should be motivated to provide ideas for itineraries or reminded of how easy it is to visit places such as Kakadu National Park overnight.
- While Litchfield National Park is both suitable and popular as a day trip destination, visitors should be encouraged to take overnight trips to destinations further afield (such as Kakadu National Park and Nitmiluk National Park) to maximise their experience, increase satisfaction and amplify the positive word-of-mouth. Clearly communicating the benefits of an overnight stay (including the benefits of not being in transit for much of the trip) is fundamental.
- As eight out of ten visitors pre-book accommodation prior to arrival, a larger proportion of visitors are locked into taking day trips from Darwin before arriving in the Northern Territory. Communicating the benefits of going on an overnight trip to regional destinations in the Top End region early in the planning process and prior to booking accommodation is essential to increase overnight dispersal from Darwin.
- Travel websites and travel agents are key information sources in the planning stage of the decision-making process. It is therefore important to ensure that key information is easily seen on tourism websites, such as which destinations are suitable for day trips and which destinations require overnight stays. It is also important to build travel agents' knowledge to include an allowance for overnight tours when accommodation is booked pre-departure.
- Raising awareness of what is on offer and what is open throughout the region during the shoulder and peak seasons is also important to assist visitors to plan their trip effectively. This communication should happen prior to arrival through to their actual stay in Darwin. The 'What's On' Calendar is a suggested medium to communicate both information and example itineraries for visitors depending on the time they have available – for example 'See the Top End region in 4 days/6 days/8 days'.
- Communicating the unique attributes of dispersing in the shoulder season is essential to overcome the perception that overnight tours during this time provide a lesser experience due to limited access and are therefore lesser value. Furthermore, by providing shelters in destinations in the Top End region, visitors are given the ability to have amazing outdoor experiences but are also provided respite from the heat and a reason to disperse during the warmer months of the shoulder periods.

This summary is extracted from research conducted by Tourism Research Australia and Tourism NT in partnership with TNS. For the full Strategic Research Report please email [tourism.research@ret.gov.au](mailto:tourism.research@ret.gov.au).

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Image: Aerial of Cullen Bay Marina/Gunlom Waterhole - Kakadu National Park  
Courtesy of Tourism NT

Publication date: October 2011



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