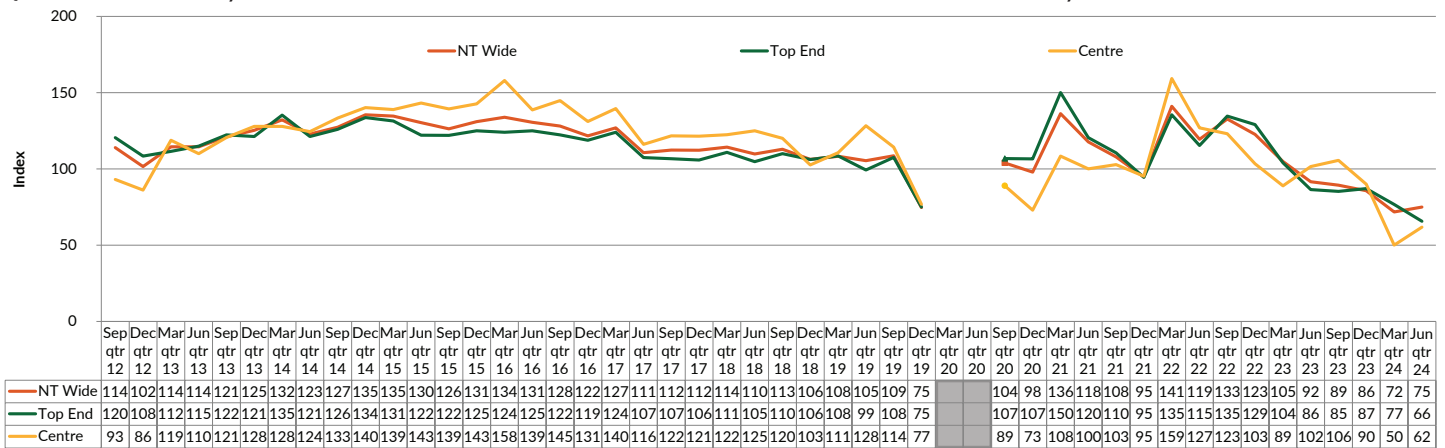


Tourism NT Industry Sentiment Poll June Quarter 2024

63 operators participated in the Industry Sentiment Poll for the June quarter 2024. According to the poll, operator sentiment with regards to their own business outlook was negative in the Centre and the Top End region, as well as across the NT for the next 12 months. Operator sentiment across most regions with regards to their regional outlook for the next 12 months was also negative, with Katherine Daly having a neutral outlook for their own region and Barkly having a neutral outlook for their own business and region in the next 12 month period.

Industry Sentiment Poll: Business Outlook

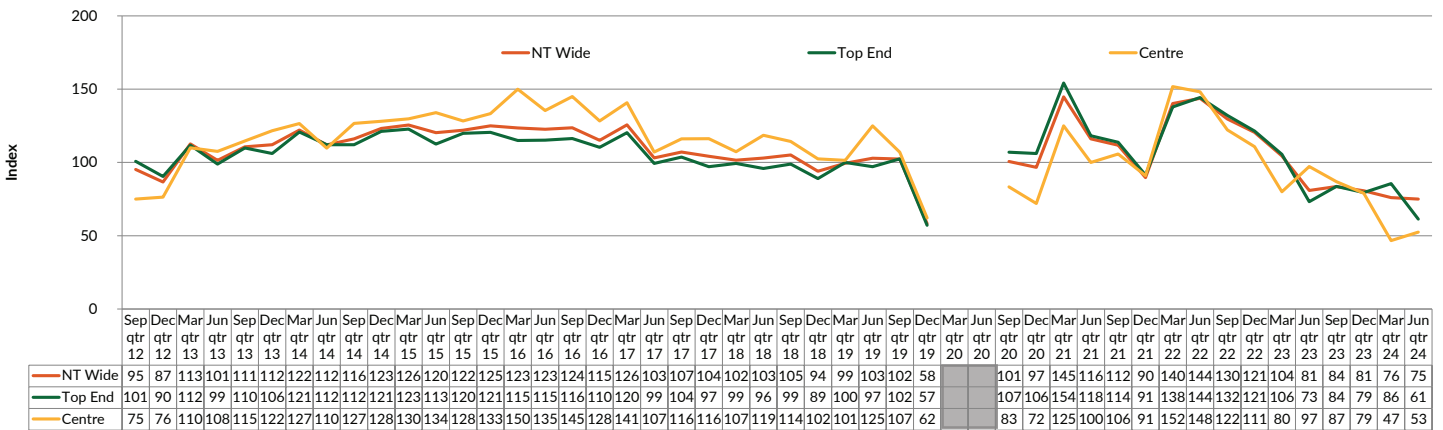
Question: What do you think the outlook for tourism will be like for the next 12 months for your own tourism business?



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.

BUSINESS OUTLOOK

- Darwin and Surrounds (67ix)
- Katherine and Surrounds (75ix)
- Kakadu Arnhem (60ix)
- Barkly/Tablelands (100ix)
- Alice Springs and Surrounds (50ix)
- Uluru and Surrounds (80ix)



REGIONAL OUTLOOK

- Darwin and Surrounds (59ix)
- Katherine and Surrounds (100ix)
- Kakadu Arnhem (33ix)
- Barkly/Tablelands (100ix)
- Alice Springs and Surrounds (32ix)
- Uluru and Surrounds (92ix)

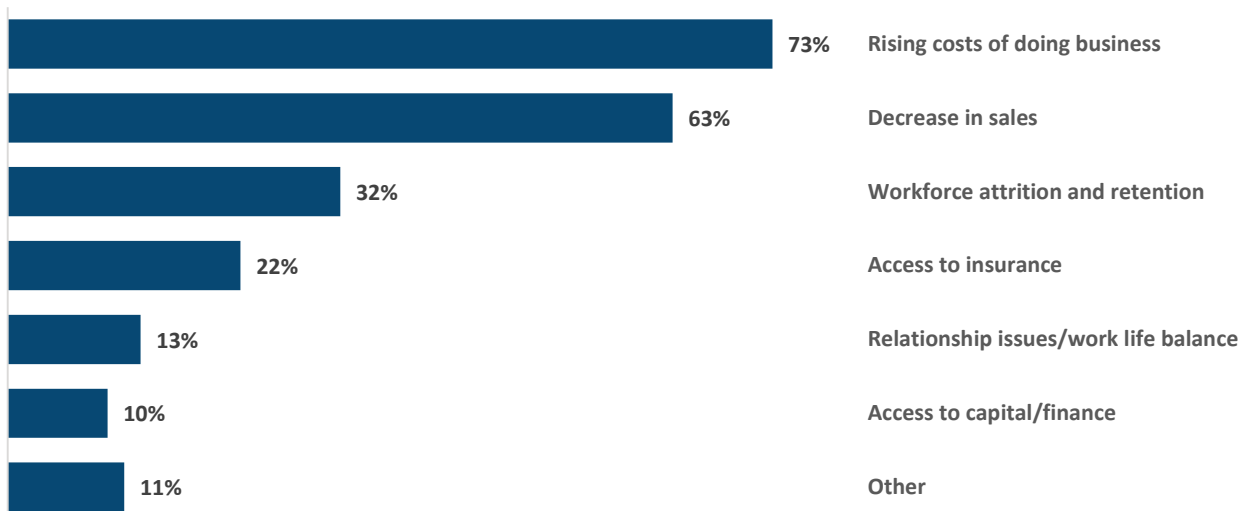
Tourism NT Industry Sentiment Poll

June Quarter 2024

Industry Sentiment Poll: Significant impacts on operation viability

Question: In terms of your own business, do you have any significant concerns impacting the ongoing viability of your operation?

Significant business impacts for operator viability by proportion of respondents surveyed



The majority of operators stated that a combination of 'rising costs of doing business' combined with 'decrease in sales' have had a significant impact on their viability to continue operations. Almost three in four (73%) operators reported challenges with the 'rising costs of doing business' while almost two thirds (63%) reported experiencing a 'decrease in sales'.

Other more prominent contributing factors include 'workforce attrition and retention' and 'access to insurance'. Almost a third (32%) of respondents stated they had problems in 'workforce attrition and retention', while over a fifth (22%) stated that they had difficulty with 'access to insurance'.

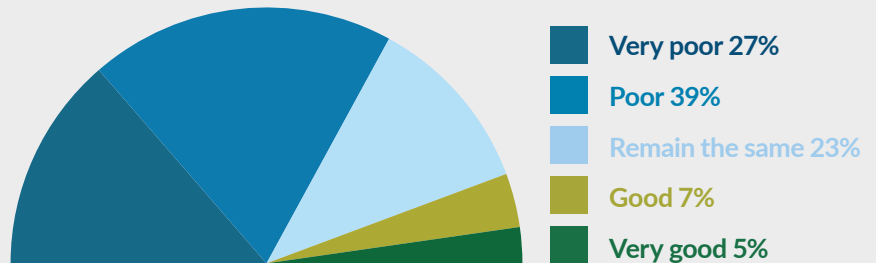
Lower reported factors included 'relationship issues/work life balance' and 'access to capital/finance', with 13% and 10% of operators stating that these issues had impacted the viability of their ongoing operations.

Other issues raised in this section included the cost and number of flights to the Northern Territory, both domestic and international, the late opening of national parks and other tourism sites, poor infrastructure and facilities in regional areas, along with ongoing impact of social issues across the Northern Territory.

Tourism NT Industry Sentiment Poll June Quarter 2024

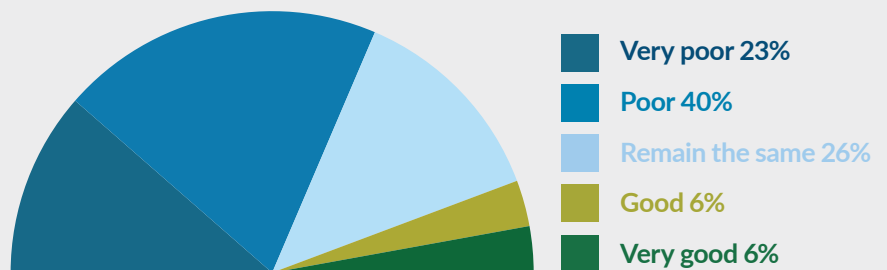
TOP END REGIONAL OUTLOOK

61 IX*
n = 44



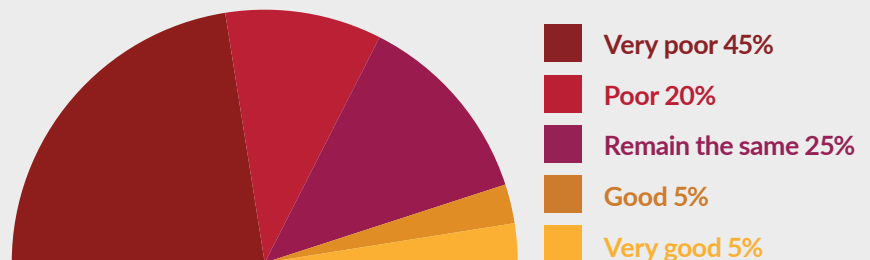
TOP END BUSINESS OUTLOOK

66 IX*
n = 35



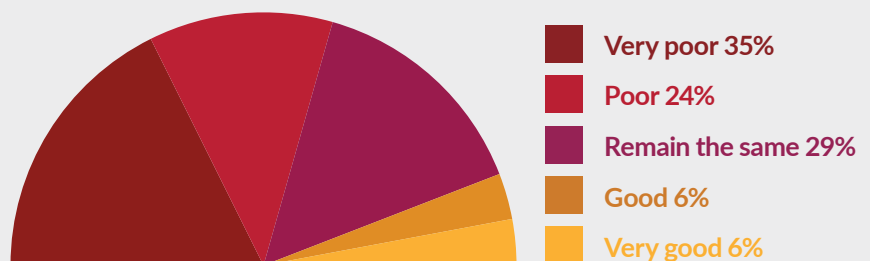
CENTRE REGIONAL OUTLOOK

53 IX*
n = 20



CENTRE BUSINESS OUTLOOK

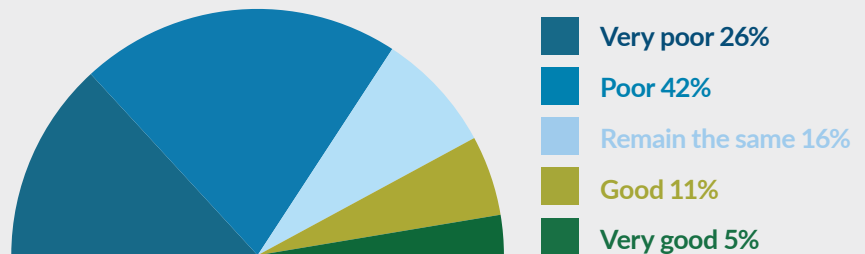
62 IX*
n = 17



Tourism NT Industry Sentiment Poll June Quarter 2024

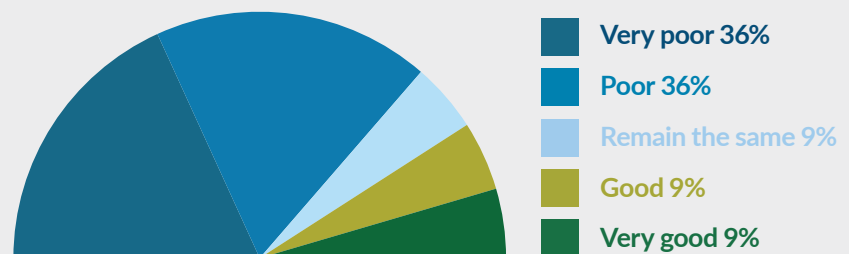
NT BUSINESS OUTLOOK BY SECTOR - Accommodation

63 IX*
n = 19



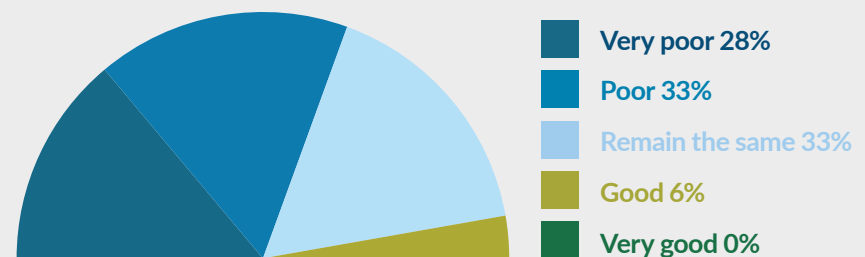
NT BUSINESS OUTLOOK BY SECTOR - Attractions

59 IX*
n = 11



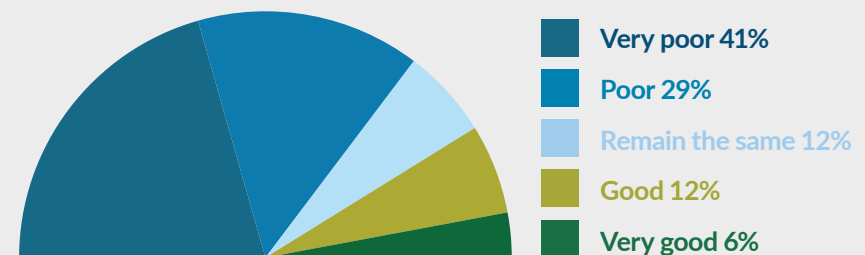
NT BUSINESS OUTLOOK BY SECTOR - Touring and Transport

58 IX*
n = 18



NT BUSINESS OUTLOOK BY SECTOR - All Other Sectors

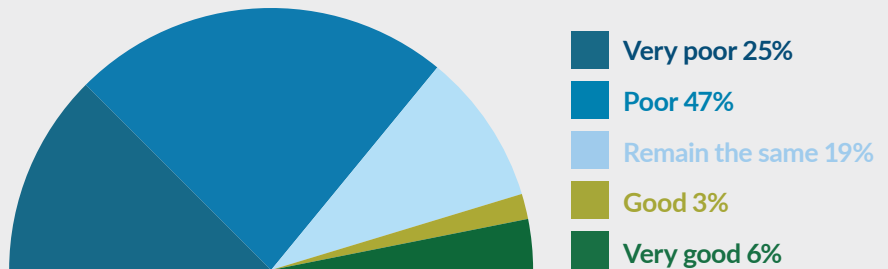
56 IX*
n = 17



Tourism NT Industry Sentiment Poll June Quarter 2024

DARWIN AND SURROUNDS REGIONAL OUTLOOK INDEX*

59 IX*
n = 32

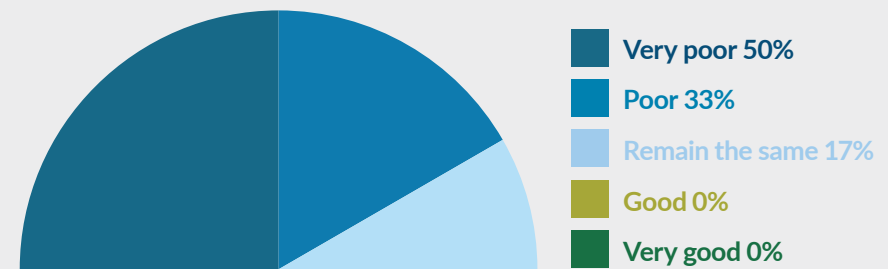


41 points below baseline

Operator outlook for the Darwin and surrounds region was lower with 72% having a negative outlook for the next 12 months. This was in contrast to 9% which had a positive outlook for the next 12 months.

KAKADU ARNHEM REGIONAL OUTLOOK INDEX*

33 IX*
n = 6

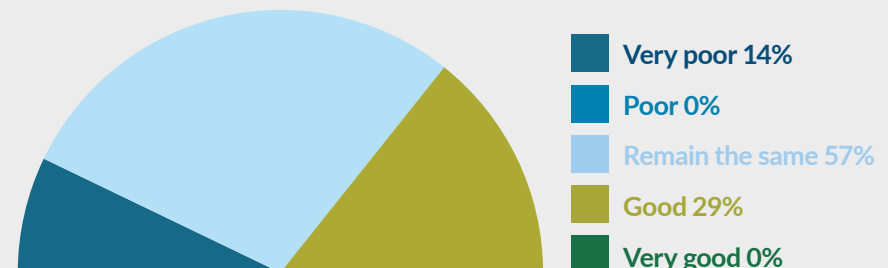


67 points below baseline

Operator outlook for the Kakadu Arnhem region was lower with 83% of operators reporting a negative outlook for the next 12 month period. 17% had a neutral outlook.

KATHERINE AND SURROUNDS REGIONAL OUTLOOK INDEX*

100 IX*
n = 7

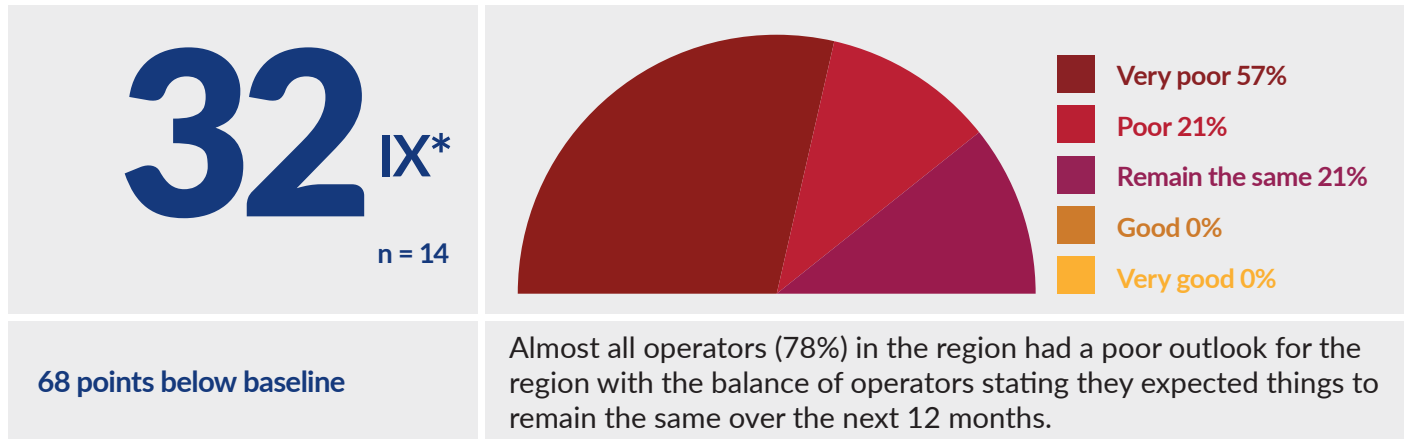


At baseline

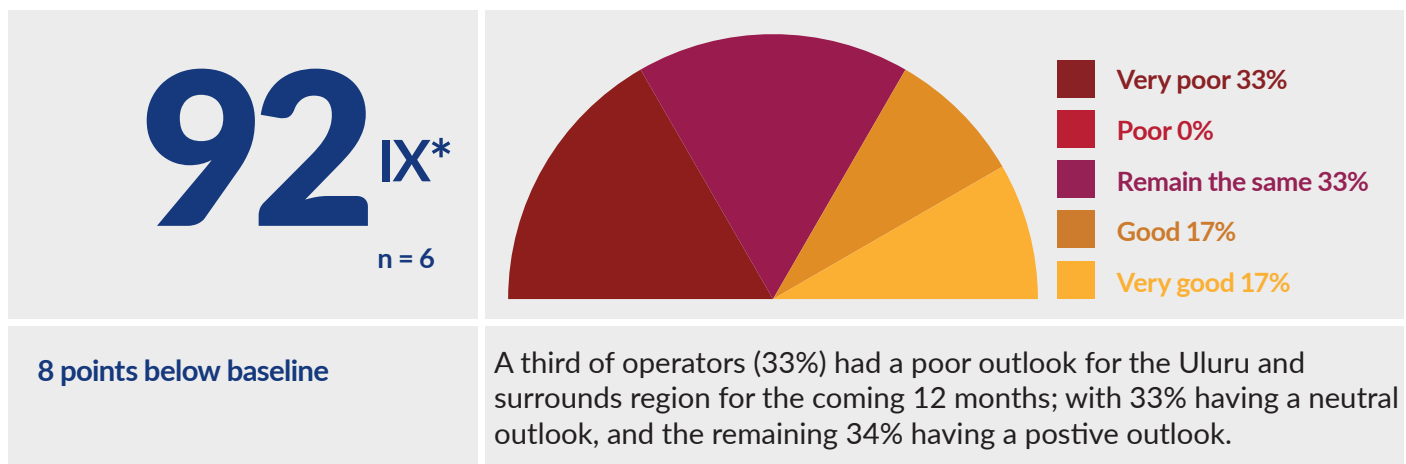
Operators were mostly neutral, with a smaller proportion having a negative outlook (14%) compared to those with a positive outlook (29%) for the next 12 months for Katherine and surrounds.

Tourism NT Industry Sentiment Poll June Quarter 2024

ALICE SPRINGS AND SURROUNDS REGIONAL OUTLOOK INDEX*



ULURU AND SURROUNDS REGIONAL OUTLOOK INDEX*



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 1,448 employing tourism businesses across the Northern Territory in 2022-23. 63 operators participated in the Industry Sentiment Poll for the June quarter 2024. Results presented for the Top End region from the Industry Sentiment Poll are informed by a sample size of 45 tourism operators. Results presented for the Centre region from the Industry Sentiment Poll are informed by a sample size of 21 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.