

NT Drive Study 2023

Since the launch of Drive Tourism Strategy 2021–30



instinct^{and}
reason



Prepared for:



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Overview of the research

Research background

Drive tourism is an essential part of the NT tourism sector. Tourism NT engaged Instinct and Reason to conduct a market segmentation and sizing study in 2019 to understand the context of drive tourism, the attitudes and behaviours towards drive tourism, the market segments, and their potential to take a self-drive or a Fly-Drive trip to the NT.

Tourism NT released the Drive Strategy (2021–30). It identifies the importance of drive visitation to the Territory's visitor economy and will be used to inform road and infrastructure priorities for the NT drive market. It also outlines current strategic positions to enhance the drive tourism experience, increasing visitation and length of stay.

This 2023 drive research will establish a baseline for the Drive Strategy and assist tourism business operators and service providers to plan and provide visitors with the experiences, products and facilities they seek on their journey.



Research purpose

This research provides Tourism NT with evidences and an up-to-date understanding of the behaviour of drive visitors and their levels of satisfaction.

The research measures:

1. satisfaction with NT destinations visited
2. journey experience of NT drive visitors
3. baseline data on the NT drive market, and
4. how the implementation of Tourism NT's drive strategy is impacting visitor perceptions.

Research methodology and sample



Methodology

Approach

Quantitative questionnaire via face-to-face interviews and online completes:

1. Project set up and planning (June 2023)
2. Questionnaire design (July 2023)
3. Fieldwork exit points of NT (September–October 2023)
4. Fieldwork via online panels to boost numbers (October 2023)
5. Analysis and reporting (November 2023).

The survey was administered via a mix of:

- intercept interviews with drive tourists
- self administered completes by drive tourists on their devices
- online completes via research panels.



Survey inclusions:

- Section A: Core questions initiated via intercepting at exits points or via online panel invitation.
 - basis demographic: gender, age, travel companions, accessibility/inclusiveness needs, usual residence
 - mode of transport
 - entry and exit points in and out of NT
 - route driven and areas visited and satisfaction
 - days and money spent on the journey
 - resources used and satisfaction
 - likelihood of returning and recommendations.
- Section B: Supplementary questions that explore inspiration, exposure and information needs of drive tourism in the NT, administered during the intercept interview or via online panel.
 - inspiration of drive holiday
 - value of drive holiday
 - exposure to NT drive tourism information and campaign
 - information needs and search before and during
 - when will they repeat another drive holiday in the NT
 - package deals
 - compare drive holiday in the NT and other destination.




Sample n=338

Potential survey participants were sought via an intercept methodology at various NT exits points — Alice Spring Airport, Kulgera, Katherine, Timber Creek, Darwin Airport, and Uluru — which made up 176 interviews. Due to bushfires near Tennant Creek and surrounds in September and October 2023, interviews did not take place in those areas Interviews were conducted at the Barkly homestead on Barkly Hwy, Threeways roadhouse on Barkly Hwy and Stuart Hwy, and Tennant Creek on Stuart Hwy.

An online survey was also used to capture 163 travellers who had completed their NT drive journey between May and September 2023.

Sample per conference	Section A completion	Section B completion (full survey)
Intercept interview	62	114
MTS visitor sample recontact		95
Online panel		67
Sub total	62	276
Total participant	338	

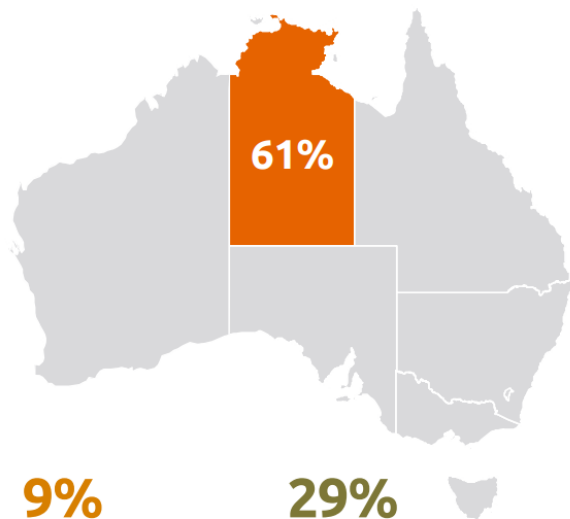
 **SCREENING CRITERIA:** All 18 years or older and currently on or have been on NT drive holiday in 2023.



Drive tourism profile according to the NT drive strategy

Taken from DTM survey - 2019

Figure 4 – Drive source markets*



9%

International

Top International Source Markets –

Germany (1.4%), France (0.9%), UK (0.9%), China** (0.7%).

29%

Interstate

Top Domestic Source Markets –

VIC (7.1%), NSW (6.5%), SA (6.1%) and QLD (5.5%)

* First region is for tourism consumption only, second field is for visitation

Figure 5 – Drive market places visited

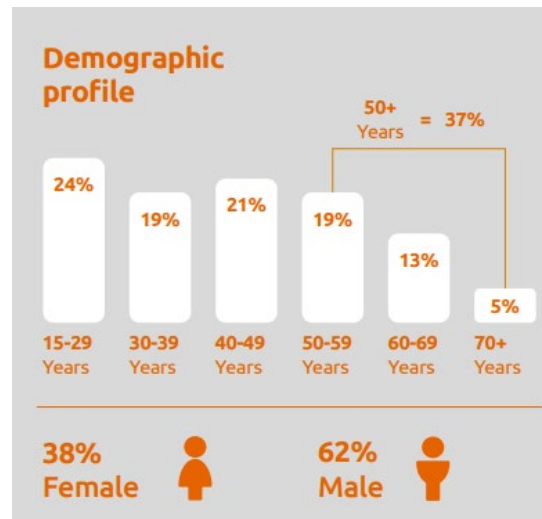
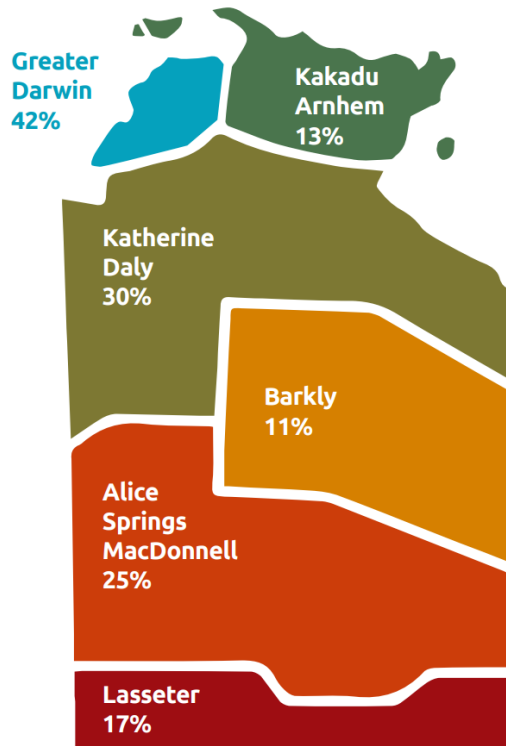


Figure 1 – Visitor numbers, nights and expenditure of drive tourists in the Territory pre-COVID-19 (year ending December 2019)⁶

Intra-Territory



Interstate



International



How good was the sample of drive travellers collected in the 2023 study?



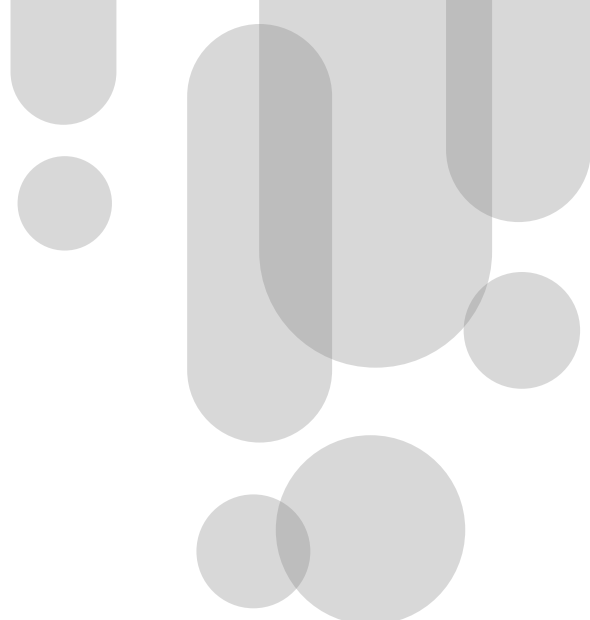
Visitor Type	2019	2023
Intrastate	57%	6%
Interstate	33% (77%*)	84%
Overseas	10% (23%*)	10%

Where did they come from	2019	2023
Victoria	24%	24%
NSW	22%	18%
South Australia	21%	10%
Queensland	19%	16%
Overseas	9%	10%

Where did they visit	2019	2023
Greater Darwin region	42%	51%
Alice Springs MacDonnell Ranges region	25%	49%
Big Rivers region	30%	40%
Barkly region	11%	35%
Lasseter region	17%	34%
Kakadu Arnhem	13%	32%

Sample was of people leaving the NT, which means intrastate NT travellers were likely underrepresented.

- The drive sample was low on overseas drive travellers, but this was due to the international market, which has yet to recover fully. The result is reasonable compared to the result in 2019 used in the Drive Strategy. But it translates to a higher representation of interstate travellers in 2023 when compared to 2019.
- The source of NT drive travellers, with the exception of SA, was similar to the market information collected in 2019.
- The sample captured in 2023 showed higher levels of visitation to the regions. This could be the result of the better-quality data captured in this study given an in-person interview in real holiday time. The National Visitor Survey relies on a telephone interview undertaken some time after the holiday took place. Detailed recall is better with the intercept method.



1b Key findings and conclusions

(1) Key insights into the NT Drive market

Take Out

53% use a 4WD

The Stuart Highway from SA is the number one NT source route

Finding

- Drive market uses 4WD (53%) then 2WDs (24%) and then campervans, RVs or motorhomes (18%). Motorcycle, electric vehicle and others account for the rest (6%).
- 33% of the drive travellers towed something.
- Drive markets use their own vehicle (67%) with one third Fly-Drive.
- **Drive market (own car)** Key entry is the Stuart Highway. (36% entered here and 30% exited). Barkly Highway from QLD and the Victoria Highway from WA were the most popular east and west routes.
- **Fly-Drive market:** Darwin Airport - (63% entered here and 60% exited).
- Alice Springs (entry point (22% entered and 27% exited).
- Uluru airport was the opposite; (10% entered and 4% exited).
- Explorers' Way (Stuart Highway) was the most popular NT drive route (56% drove it). The Kakadu Loop (27%) and Red Centre Way (26%) were the next most popular NT drive routes. Other well used routes were the Outback Way (22%), Savannah Way (22%), Greater Litchfield Loop (21%), and some less well used routes — the Arnhem Way (11%) and Binns Track (9%).

(2) Key insights into the NT Drive market

Take Out

The drive market is split in terms of where they travel with 51% visiting the North and 49% the Red Centre

76% still had “other NT destinations” they wanted to visit (but couldn’t on this trip)

Finding

Red Centre (49%) was most popular for own vehicle drivers (56%)

Barkly region was used more by own vehicle drivers (45% compared to 15% of Fly-Drive).

- West Arnhem was used more by Fly-Drive visitors (30% compared to only 22% own vehicle drivers).
- Only 24% had visited all parts of the NT they wanted to.
- 76% wished they could have visited other part of the NT during their trip.
- West Arnhem was the most desired missed place (22%), then East Arnhem land (20%), the Lasseter Region (17%), Alice Springs and the MacDonnell Ranges (14%), Greater Darwin Region (12%), Big Rivers region (11%) and Barkly region (9%).

(3) Key insights into the NT Drive market

Take Out

There are two very different drive market segments – Owner-driver and Fly-Drive visitors

The average satisfaction score with the NT experience was 4.34 out of 5.

Findings

- Own vehicle drivers spend 19.7 days on average in NT compared to 9 days for Fly-Drive.
- Fly-Drive visitors spend more - \$534.55 pd vs \$233.07 per day for those in own vehicles.
- **There are high levels of satisfaction with the overall NT driving holiday** with 45% very satisfied, 46% satisfied, and 8% neutral. The average score was 4.34 overall. Fly-drive satisfaction = 4.43; Own vehicles 4.29.

Route	Satisfaction	Route	Satisfaction	Route	Satisfaction
Outback Way	4.49	Greater Litchfield Loop	4.25	Binns Track	4.10
Kakadu Loop	4.27	Red Centre Way	4.22	Savannah Way	4.08
Explorers Way (Stuart Highway)?	4.26	Arnhem Way	4.18		

(4) Key insights into the NT Drive market

Take Out

Satisfaction with most regions is high

Findings

Route	Satisfaction	Route	Satisfaction	Route	Satisfaction
Lasseter region	4.46	West Arnhem Land	4.19	Barkly region	3.88
Greater Darwin region	4.24	Alice Springs & MacDonnell Ranges region	4.16		
East Arnhem Land	4.20	Big Rivers region	4.13		

(5) Satisfaction with the NT drive experience

Take Out

Satisfaction with facilities is high except for mobile reception

Satisfaction with food and accommodation has some challenges

Satisfaction with booking has some challenges too

NT drive holiday meeting expectations

Drive travellers are recommending the NT

Finding

- The key area of dissatisfaction, based on those who experienced the facilities, was with the lack of mobile reception. This impacted every drive traveller segment to varying degrees. Mobile reception (2.97 out of 5) was followed by the poor quality of public toilets (3.63 out of 5); mechanical services (3.82) and the lack of / and quality of facilities at rest stops (3.87).
- The key areas of dissatisfaction, based on those who experienced these services, were with the lack of free camping. This impacted every drive traveller segment to varying degrees. The lack of free camping (3.79 out of 5) was followed by the poor quality of restaurants and cafés (3.85), food and drink (3.90 out of 5) and then the poor quality of roadhouses (3.99).
- The key area of dissatisfaction with the visitor experience, based on those who experienced these aspects, was with the difficulty in booking products and services. This impacted every drive traveller segment to varying degrees except solo and group travellers. Booking (3.88 out of 5) was followed by a slightly less-than-ideal quality tourism products and services (3.92 out of 5) and, to a lesser degree, the customer service they experienced (4.03 out of 5).
- The drive holiday met the expectation of 95% of the drive travellers interviewed. It was more likely to exceed the expectations of those who took a Fly-Drive holiday, were more spontaneous rather than carefully planned, families with children, and middle-aged travellers who didn't travel with children.
- 62% of drive holiday visitors would recommend the NT for a holiday and 60% would recommend the NT for a drive holiday with the promotion of the NT being relatively similar for the two drive segments.

(6) Role of marketing in drive travel in the NT

Take Out

54% of drive travellers will return

Information sources: 39% aware of NT marketing. Word of mouth created most exposure.

Was the TNT website helpful?

37% used a suggested itinerary

Finding

- 52% for another drive experience; 13% will not and 33% are only somewhat likely to try the NT again.
- 83% of the aware said the advertising matched their NT experience. Word of mouth creates the most exposure to the current drive market (81%). Websites that promote Drive holidays (56% found out this way) such as northernterritory.com, Tourism Top End, and Discover Australia Holidays. 70% of those said they were helpful in planning their trip.
- 28% of the market found out about NT holiday via northernterritory.com. Exposure was stronger among tourists travelling with children (35%), the Fly-Drive market (32%), inexperienced drive tourists (31%), and planners (30%).
- 98% of those who used itineraries found them easy to understand. 53% developed their own itineraries for their NT drive holiday and 16% booked the trip as a package through a travel agent.
- **If returning**, 17% would like to book a drive holiday as a package (including itinerary, flight, accommodation, car hire, and limited activities) either online or through a travel agent.
- Fly-Drive to book a flexible package, allowing them to be able to change dates and directions (39%).
- Drive-Drive to create their own itinerary (44% were not interested in packages online or via a travel agent).

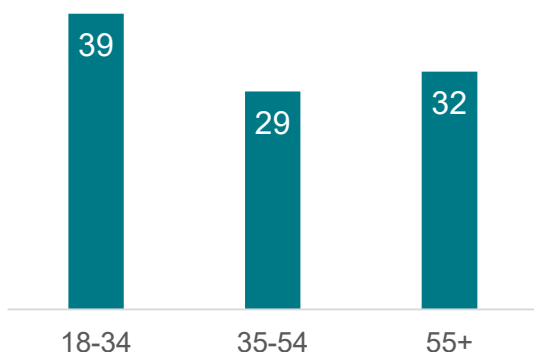


2 Insights into the drive market

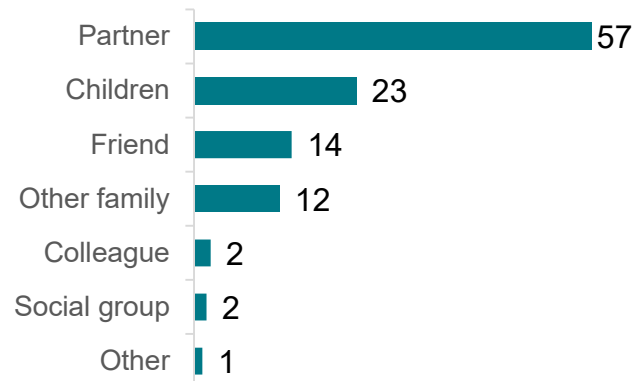


2023 drive survey sample

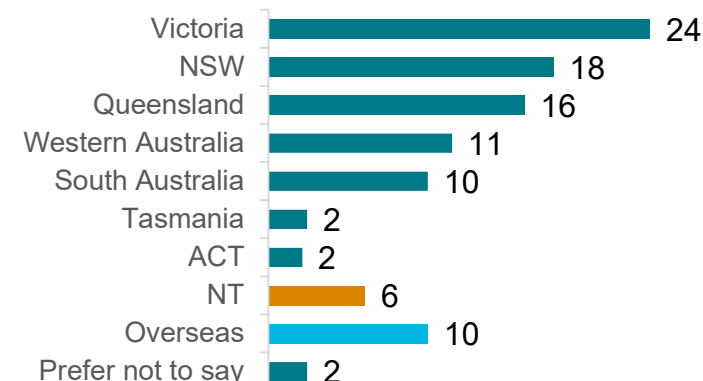
Age (in %)



Travel companion (in %)



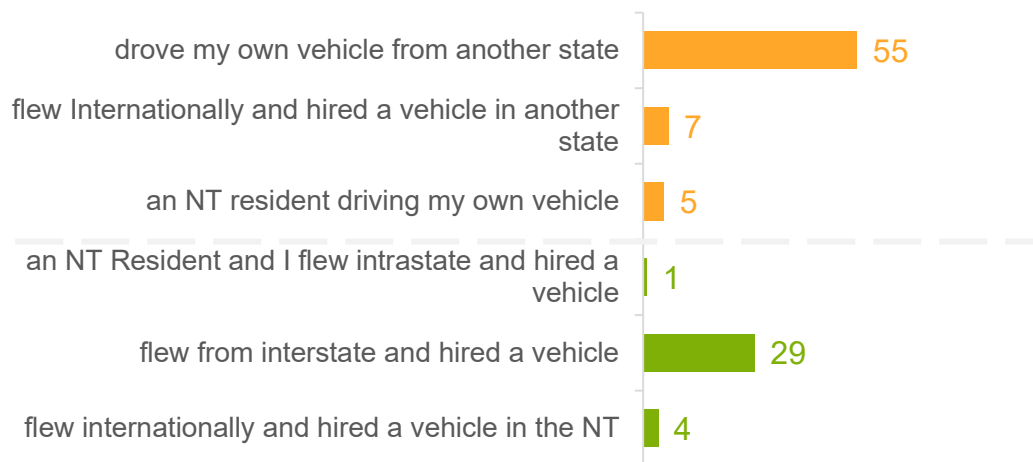
Where they come from (in %)



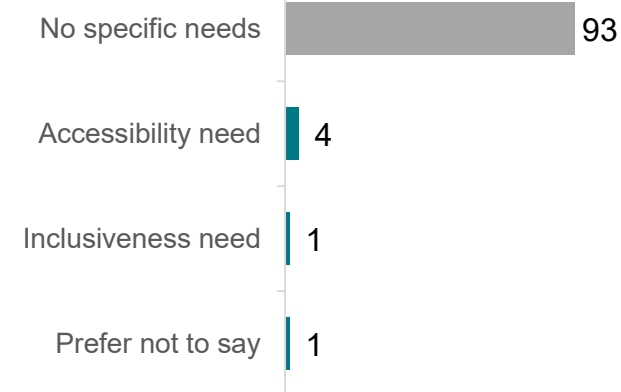
Drive segment (in %)

Drive-Drive
67%

Fly- Drive
33%



Accessibility / inclusiveness (in %*)



Note: *Percentages do not add up to 100% due to rounding.



Profile of the drive segments

Drive-Drive segment were more likely to:

- travel in a 4WD
- tow a caravan, camper trailer
- enter and exit NT via Stuart Hwy from SA, Victoria Hwy from WA
- visited Alice Spring & MacDonnell Ranges and Barkly region
- driven on Explorers Way, Savannah Way and the Overlanders Way
- use:
 - rest stops/bays
 - camping
 - commercial caravan/camping site
 - national park campground
 - free camping
 - roadhouse
 - motor vehicle mechanical support
 - farm stay
 - hipcamp or similar
- have a household yearly income between \$30,000 and \$59,000
- be disinterested in booking a drive holiday online or through a travel agent if they were to re-visit the NT for another drive holiday,
- be extremely likely to return for another Drive holiday in the NT (53%)

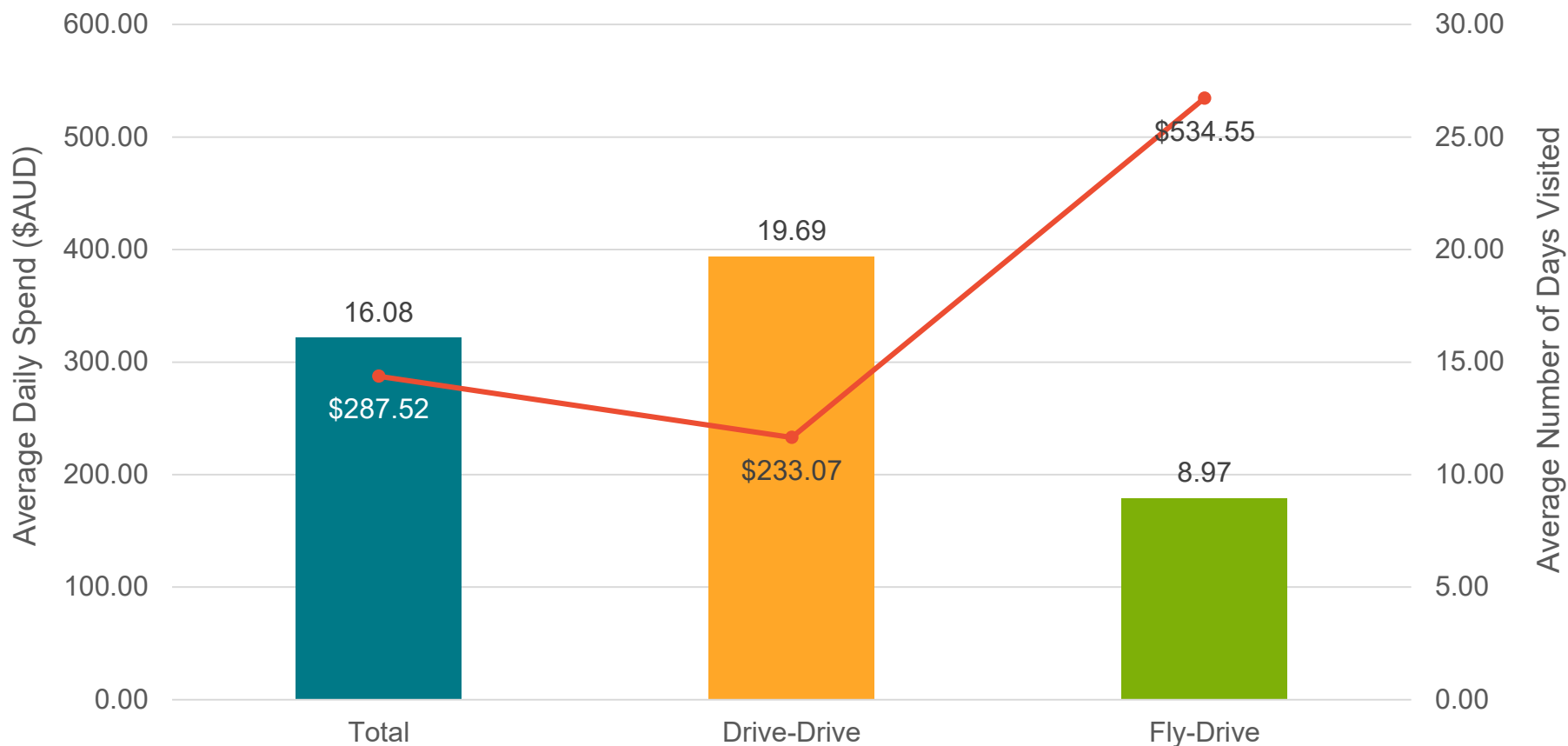
Fly-Drive market were more likely to:

- travel in a 2WD vehicle
- not tow anything
- enter and exit via Darwin, Alice Springs and Uluru airport.
- spending AUD\$5000 or more on the whole Fly-Drive trip
- stay in hotel/motel/cabin
- use hired vehicle
- have a household yearly income over \$150,000
- carefully plan the accommodation and experiences for drive holidays
- book a flexible package allowing them to change dates and include a hire car, accommodation and activities if they were to re-visit the NT for another drive holiday,
- be extremely likely to return for another Drive holiday in the NT (50%)



Number of days and money spent

total sample by drive segment



- The Fly-Drive and those using their own vehicles are very different markets.
- Those driving their own vehicle spend substantially longer travelling around the NT (19.69 days on average compared to 8.97 days for Fly-Drive visitors).
- In contrast, Fly-Drive visitors spend more money in the NT. It was \$534.55 per day on average for the Fly-Drive market and \$233.07 per day for those using their own vehicles.

Base: Total sample n=338, Drive-Drive n=225, Fly-Drive n=106

Source: IC12.How many days did you spend on your drive holiday in the NT? (include all the days you spent travelling in the NT)? IC13. Could you estimate about how much you spent for your entire drive holiday in the NT for your travelling party? (Including accommodation, fuel, food, entertainment, and experiences)



What types of vehicles are used for an NT Drive holiday?

by total sample

Vehicle used (in %)		Item towed (of total % - multiple choice)				
		Didn't tow	Caravan	Camper trailer	Boat	Trailer
Total sample:		67	22	8	1	2
4WD	53 n=179	28	18	5	1	1
2WD Hatchback/sedan	24 n=80	21	1	1	1	-
Campervan/Recreation Vehicle/Motorhome SUV	18 n=60	12	4	2	-	0.3
Other	4 n=15	4	-	-	-	-
Electric vehicle	2 n=8	1	1	1	0.3	-
Motorcycle	2 n=6	2	-	-	-	-

Self-contained tourists account for **44%** of the market

Most of the Drive market uses 4WD (53%), followed by 2WD sedans (24%), and then campervans, RVs or motorhomes (18%).

33% of the drive travellers towed something: 22% towed a caravan, 8% camper trailer, with the rest towing boats or trailers.

People with 4WD were more likely to tow than others.



What makes people choose the NT for a drive holiday?

total sample



Base: Total sample n=338

Source: A1. Thinking about this drive holiday, what were the reasons you chose the NT for a drive holiday?



Attitudes towards drive holidays

total sample by drive segment

■ Planner

47% of the sample

■ Spontaneous

53% of the sample

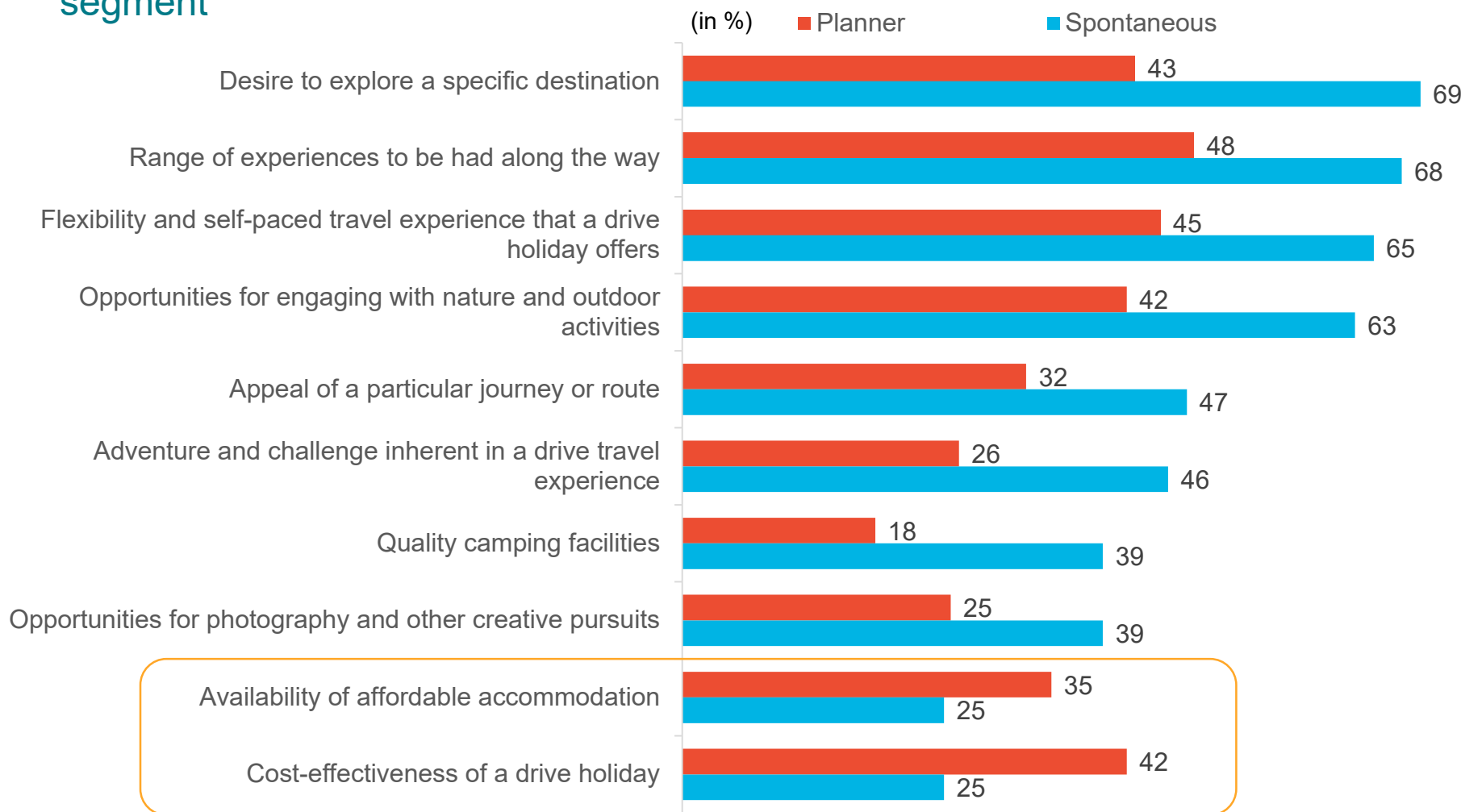


- **Planners:** while they enjoy the freedom and adventure a drive holiday offers, they also carefully plan accommodation and their holiday experiences for their drive holiday (4.27 out of 5).
- **Spontaneous:** enjoy the freedom and adventure aspects of drive holidays even more but place less importance on planning (2.81 out of 5).



How do segments differ in terms of the reasons they chose the NT?

Planners vs Spontaneous, there were gaps over 10% and the reasons matter to more than 20% of the segment



- Spontaneous drive travellers are much more driven by the desire for experiences.
- Planners appear to be heavily impacted by the need to keep to a budget, sometimes overriding their ability to enjoy the experiences they find along the way. The cost-effectiveness of a drive holiday is substantially different to that of spontaneous drivers (42% to 25%). Affordable accommodation features were a much more important reason (35% compared to 25% for the spontaneous drivers).
- We also see on the previous chart that Planners score high on “I like to carefully plan the accommodation and experiences for drive holidays” compared to the more Spontaneous traveller.
- Planners are less inclined to recommend NT than spontaneous drivers.

Profile of the planners/spontaneous travellers

Planned (53%) drive travellers were more likely to:

- fly internationally and hire a vehicle from other states
- score 7-8 out of 10) to recommend NT for a holiday
- to have booked this trip as a package through a travel agent
- to have found out about NT drive holiday via third-party agency or organisation
- to have used a suggested itinerary
- if they were to re-visit NT, to book a holiday as a package (including itinerary, flight, accommodation, car hire, and activities)

Spontaneous (47%) drive travellers were more likely to:

- (9-10) to recommend NT as a place for a holiday
- (9-10) to return to NT for another drive holiday
- have used :
 - Public toilets,
 - Restaurants and cafes
 - Road signage
 - Rest stops
 - National parks
 - Camping
 - Visitor information centre
 - Commercial caravan/camping site
 - Free camping
 - Roadhouse
 - History/heritage
 - Cultural tourism products
 - Adventure (hiking/biking/fishing)
- word-of-mouth a helpful source of information to plan drive holiday
- created their own itinerary
- done a drive holiday elsewhere than the NT



What were the entry and exit points for those using their own car?

by travellers not from NT, Drive-Drive

Darwin Airport:

- Entry: 5%*
- Exit: 10%

Victoria Hwy from WA:

- Entry: 14%
- Exit: 14%

Other entry/exit points into the NT:

- Entry: 1%
- Exit: 2%

Tjukarru Rd from WA:

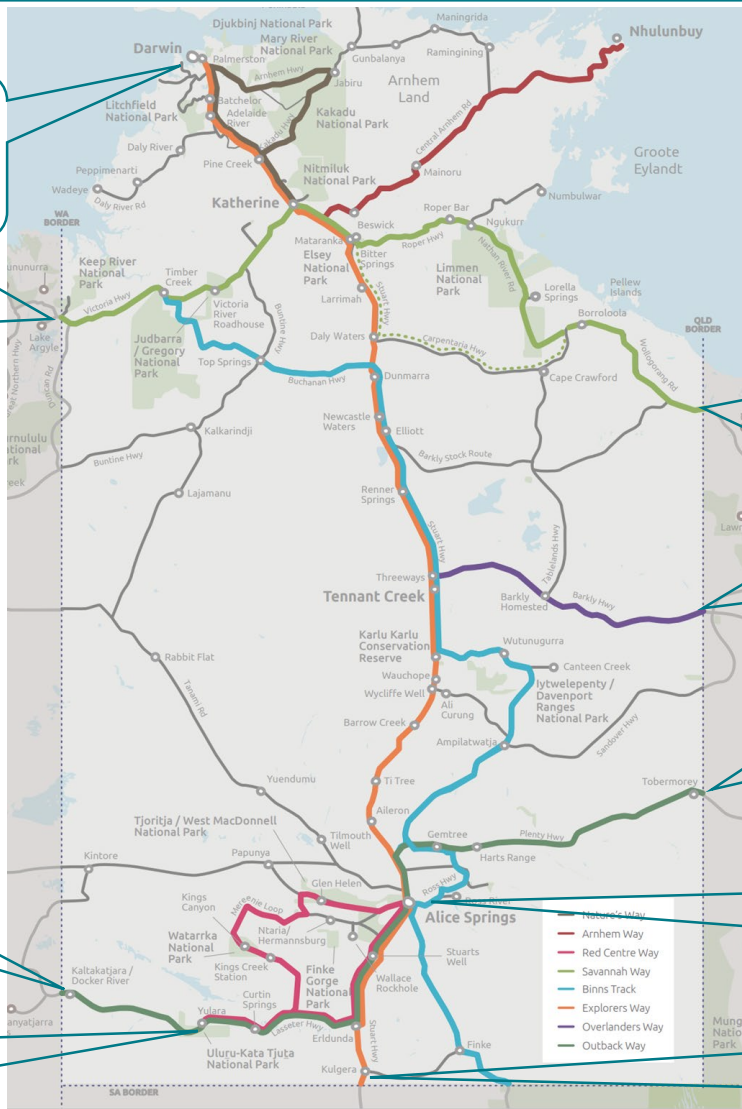
- Entry: 2%
- Exit: 3%

Uluru Airport:

- Entry: 2%
- Exit: 3%

*Includes:

- those who have friends or relatives in the NT who didn't hire a rental car to drive in the NT
- those (such as backpackers) who bought a car to start their drive holiday



• Stuart Highway from South Australia is the predominant entry and exit point among those who drove into the NT to begin their holiday (36% entering here and 30% exiting).

• The Barkly Highway from QLD and the Victoria Highway from WA are the most popular east and west routes.

Wollogorang Rd from QLD:

- Entry: 8%
- Exit: 8%

Barkly Hwy from QLD:

- Entry: 16%
- Exit: 19%

Plenty Hwy from QLD:

- Entry: 5%
- Exit: 6%

Alice Springs Airport:

- Entry: 11%*
- Exit: 6%

Stuart Hwy from SA:

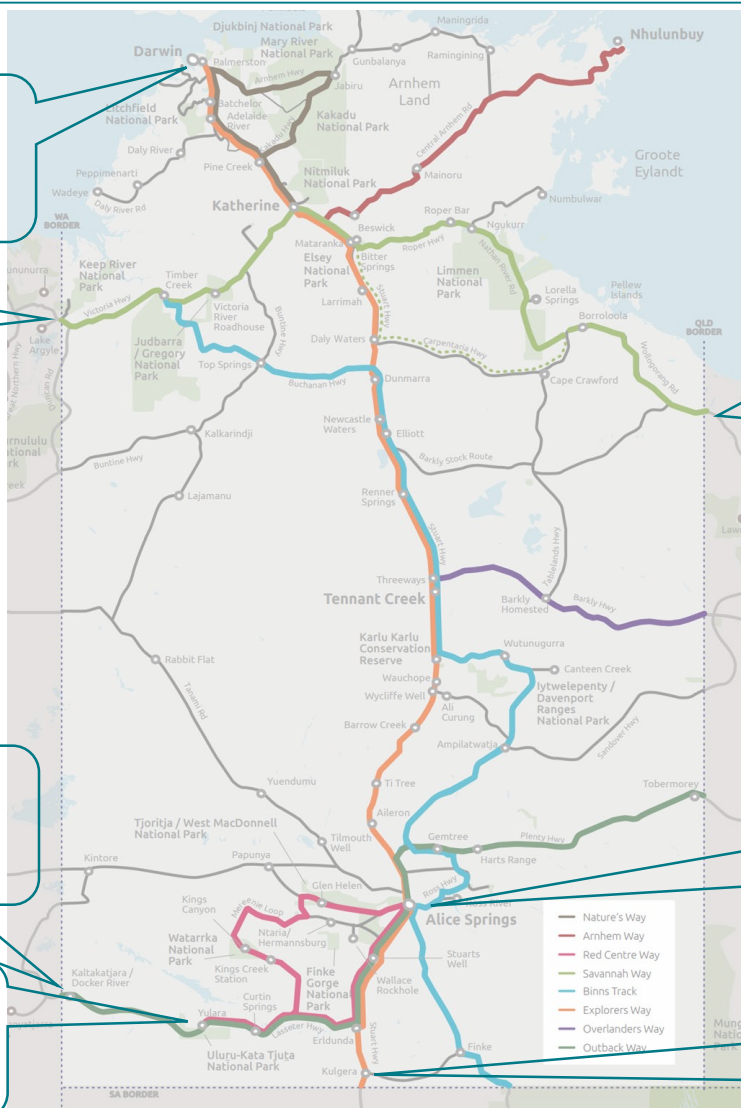
- Entry: 36%
- Exit: 30%

NB: The visual difference in the charts are due to decimal place rounding because of a sample difference of 1 or 2 respondents.
Base: Sample who are not NT residents and the Drive-Drive segment n=207
Source: IC6. What was your entry point into the NT? IC7. What is your intended exit point out of the NT?



What were the entry and exit points for those hiring a car in the NT?

by travellers not from NT, Fly-Drive



Darwin Airport:

- Entry: 63%
- Exit: 60%

Victoria Hwy from WA:

- Entry: 1%
- Exit: 2%

- Darwin Airport is the main entry point among those who flew into the NT to begin their drive holiday (63% entered here and 60% exited).
- Alice Springs was also important as an entry point (22% entered here) but more important as an exit point (27%), while Uluru airport was the opposite. It was more important as an entry point (10%) and less so as an exit point (4%).

Wollogorang Rd from QLD:

- Entry: 2%
- Exit: 2%

14 of the sample flew into Uluru Airport:

- 7 left via Alice Springs airport,
- 3 left via Uluru airport
- 2 left via Tjukarru Rd to WA,
- 1 via Wollogorang Rd to QLD
- 1 via another exit

Tjukarru Rd from WA:

- Entry: 0%
- Exit: 1%

Uluru Airport:

- Entry: 10%
- Exit: 4%

Alice Springs Airport:

- Entry: 22%
- Exit: 27%

Stuart Highway from SA:

- Entry: 1%
- Exit: 5%

NB: the visual difference in the charts are due to decimal place rounding because of a sample difference of 1 or 2 respondents.

Base: sample who are not NT residents and the Fly-Drive segment n=104

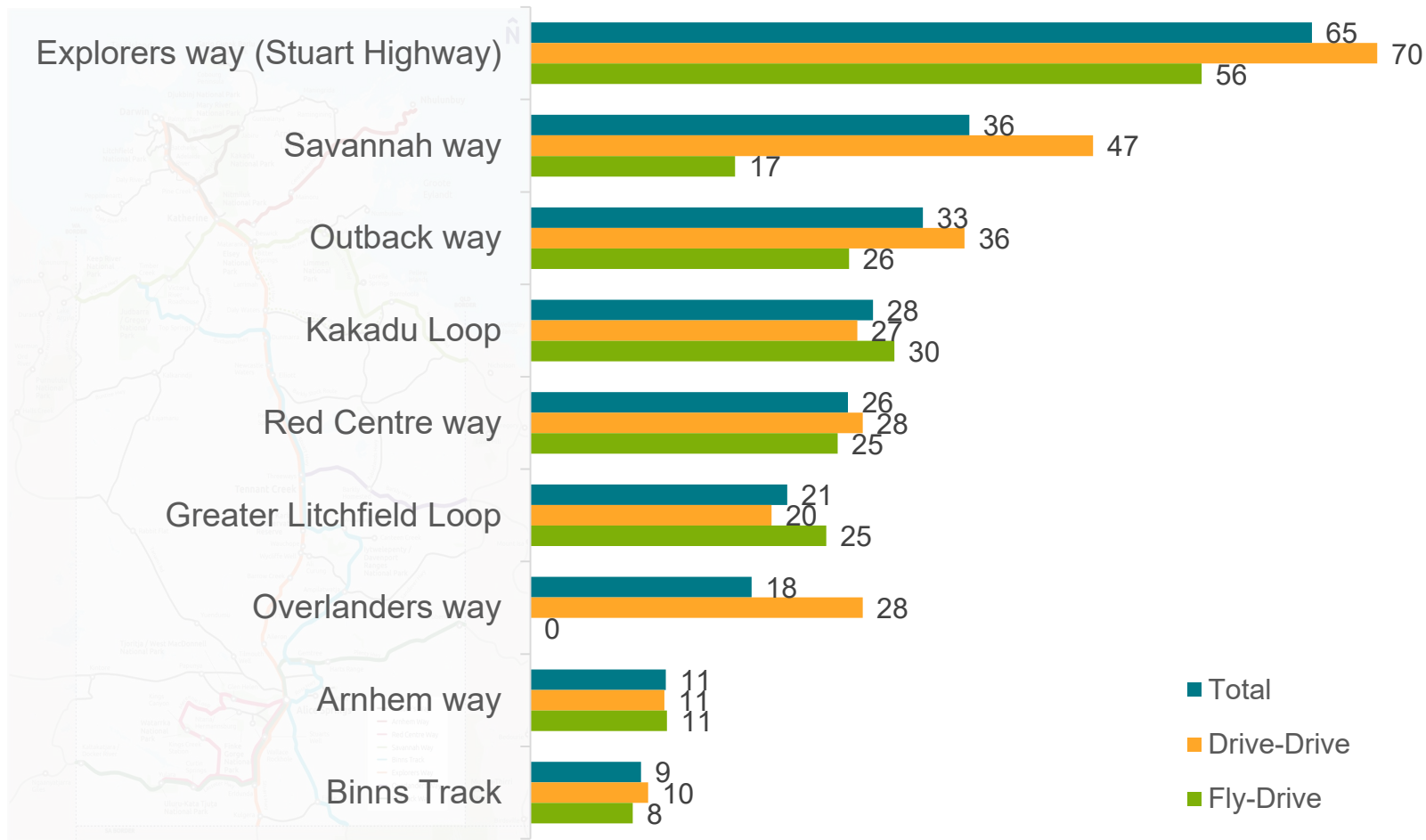
Source: IC6. What was your entry point into the NT? IC7. What is your intended exit point of the NT?



What NT drive routes were undertaken?

by all drive travellers

(in %. Multiple choices, add to more than 100%)



- Explorers' Way (Stuart Highway) was the most popular drive route, driven by 65% of the drive market.
- Savannah Way (36%) and Outback Way (33%) were the next most popular drive routes, especially among the Drive-Drive market.
- Other well used routes were:
 - The Kakadu Loop (27%)
 - Red Centre Way (26%)
 - Greater Litchfield Loop (21%)
- Followed by some minor routes:
 - Arnhem Way (11%)
 - Binns Track (9%)

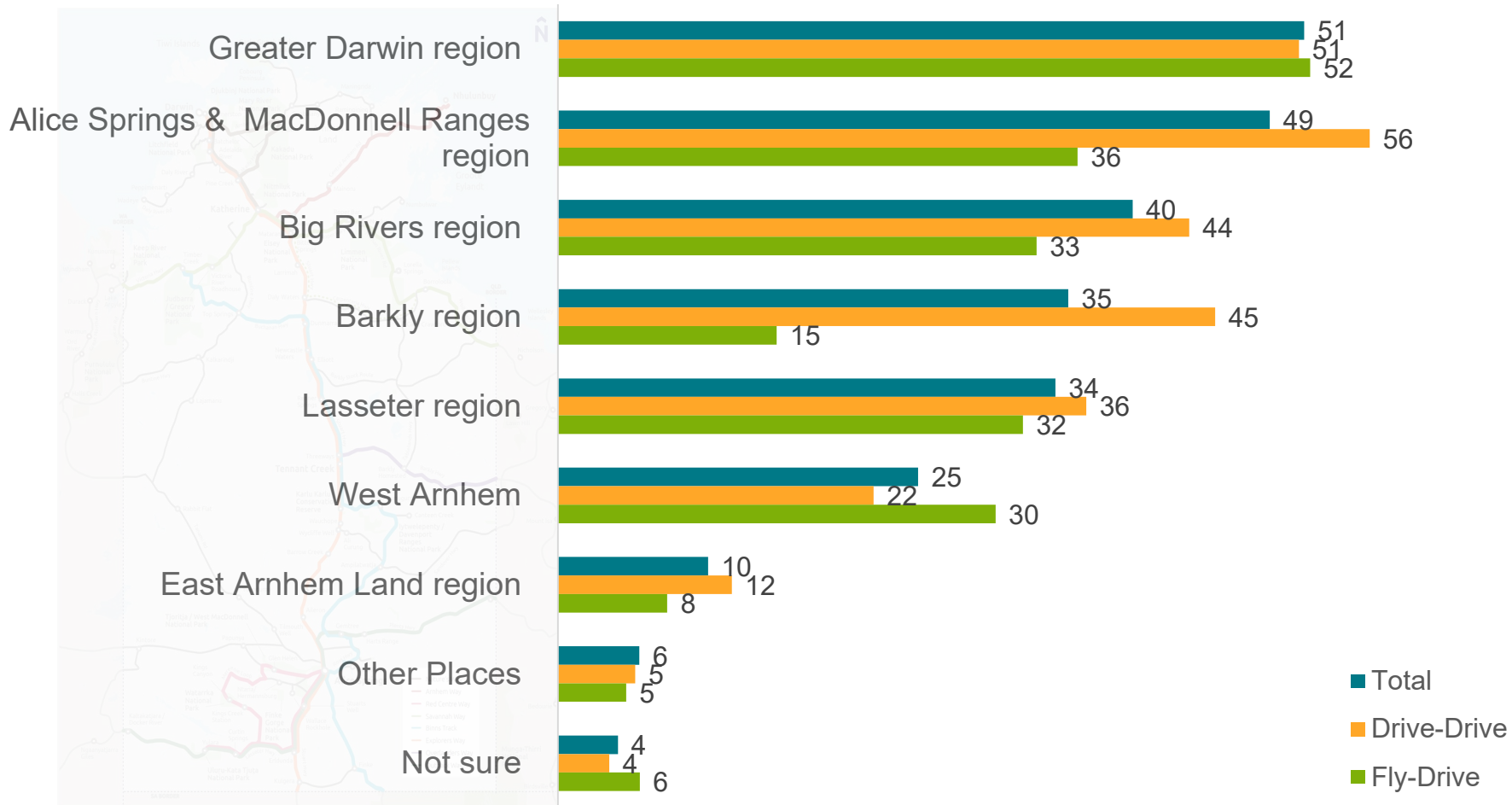
Potential new route: General consultation with stakeholders in Northern Australia revealed that the Outback Way from Winton/Boulia (QLD) to Alice Springs was discussed more and might represent a new drive route of importance to the Northern Territory as it offers a different experience and provides a new loop journey from the Eastern States to the NT and return (i.e. the Savannah way could be used to enter the NT and the Outback way could be used to return to the East Coast without covering the same route).



Which regions of the NT were visited by the NT Drive market?

total sample by drive segment

(in %. Multiple choices, add to more than 100%)



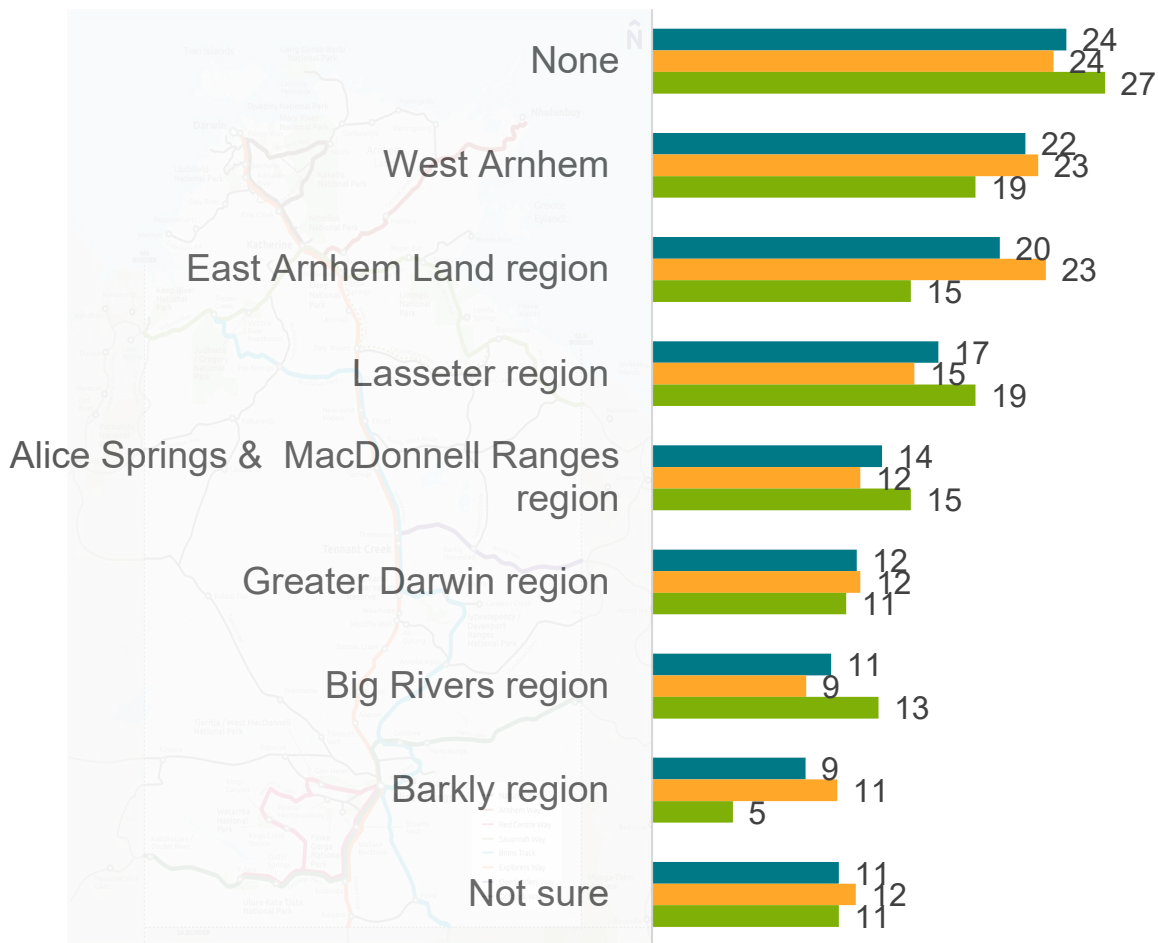
- Greater Darwin in the tropical North was marginally the most popular area visited by 51% of the total drive market.
- This was closely followed by Alice Springs and the MacDonnell Ranges in the Outback (49%) with this part of the NT more popular for those driving their own vehicles (56%).
- The Barkly region was similarly used more by those driving their own vehicle (45% compared to 15% of Fly-Drive).
- West Arnhem, in comparison, was used more by Fly-Drive visitors (30% compared to only 22% of those driving their own vehicle).



Which areas of the NT did travellers want to visit but didn't?

total sample by drive segment

(in %. Multiple choices, add to more than 100%)



- **44%** didn't visit a place they wanted due to time constraints
- **6%** didn't because of distance
- **1.3%** didn't because of a perception it wasn't safe (Alice Springs and Tennant Creek)

- Only 24% had visited all parts of the NT they wanted to.
- 76% wished they could have visited at least one other part of the NT of these listed areas during their trip.
- West Arnhem was the place missed by most (22%), followed by East Arnhem land region (20%), the Lasseter region (17%), Alice Springs and the MacDonnell Ranges (14%), the Greater Darwin region (12%), the Big Rivers region (11%) and the Barkly region (9%).

■ Total
 ■ Drive-Drive
 ■ Fly-Drive

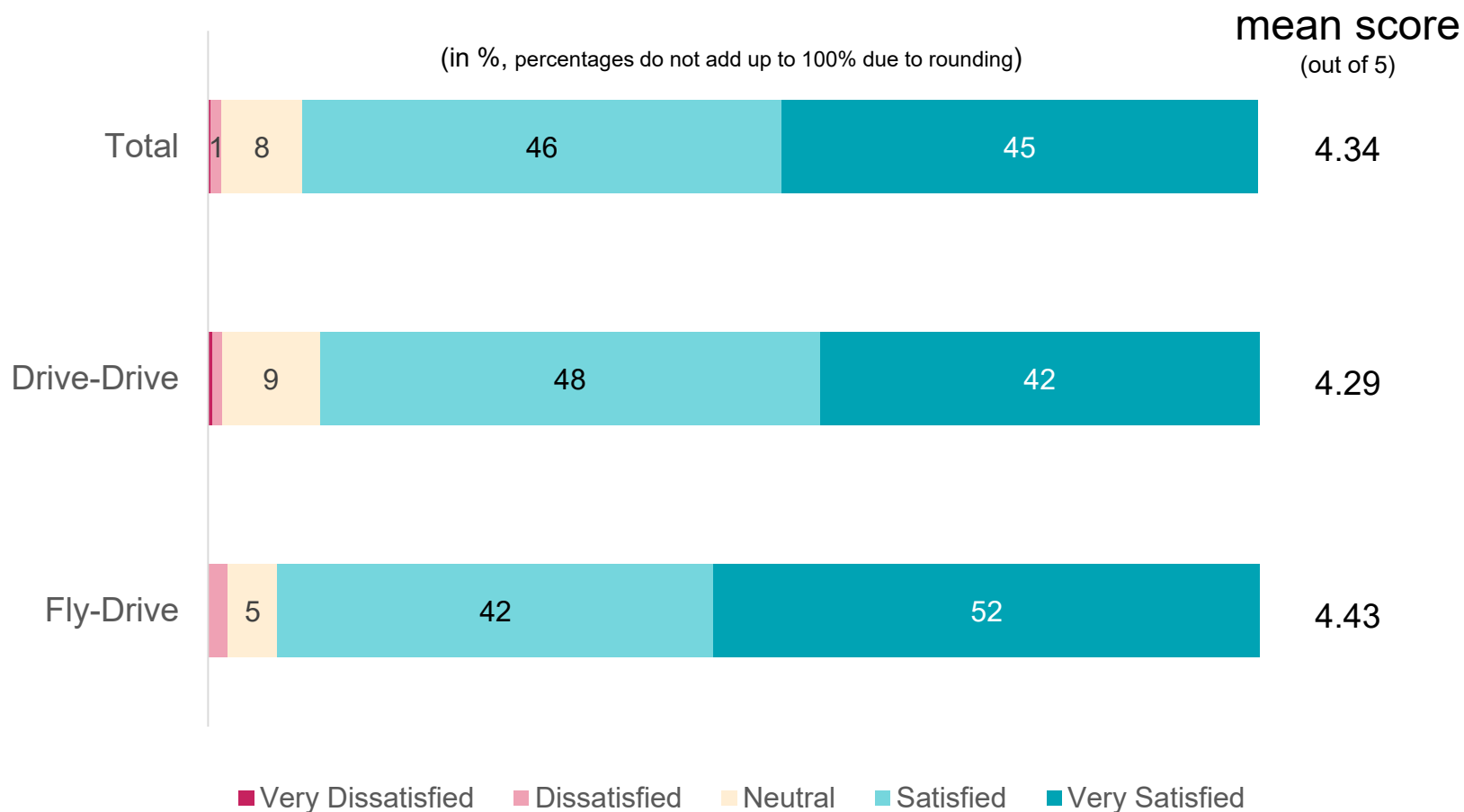


3 Does the NT drive experience satisfy travellers?



Overall satisfaction with the NT drive holiday experience

total sample by drive segment



- There are high levels of satisfaction with the overall NT driving holiday – with 45% very satisfied, 46% satisfied, and 8% neutral. The average score was 4.34 overall.
- Fly-Drive segment had slightly higher satisfaction levels (average score of 4.43 out of 5) than those using their own vehicles (4.29 out of 5).

Base: Total sample n=338, Drive-Drive n=225, Fly-Drive n=106

Source: IC14. On a scale from 1 to 5, with 1 being 'Very Dissatisfied' and 5 being 'Very Satisfied', how would you rate your overall driving holiday experience at each of the following routes and locations you have been on/to?



3a Do the NT Drive holiday **routes** satisfy travellers?

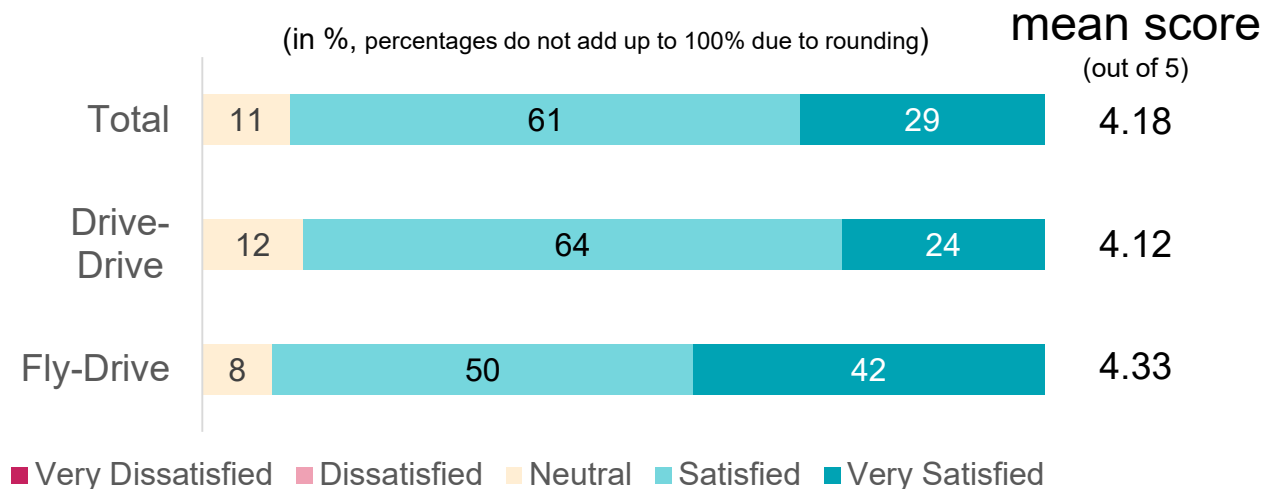


How satisfied were users of the Arnhem Way?

total sample by drive segment

11% driven
n=38

Drive-drive n=25*
Fly-Drive n=12*



- 29% of travellers on this route are very satisfied with the Arnhem Way drive route, 61% satisfied.
- Satisfaction is stronger among the Fly-Drive segment (4.33 compared to 4.12 for the Drive-Drive segment).

Travellers with children are significantly less likely to be unhappy about this route

"The road is a 'dirt road' and should be made into bitumen/sealed. It is not easily accessible and infrastructure needs to improve. Other options such as flights in and out of the town are expensive. If the road were sealed/upgraded/improved, it would vastly improve visitation of the town and assist tourism and diversification (especially given the looming mine closure)"

But [a contrasting view] is that "given the unsealed road that reduced visitation unless properly equipped, Nhulunbuy is currently a peaceful heaven for those who can make it there. Visitors are out there for months to enjoy the area".

*small sample size. Interpret with caution

Base: Sample size as indicated above

Source: IC14. On a scale from 1 to 5, with 1 being 'Very Dissatisfied' and 5 being 'Very Satisfied', how would you rate your overall driving holiday experience at each of the following routes and locations you have been on/to?



How satisfied were users of the Binns Track?

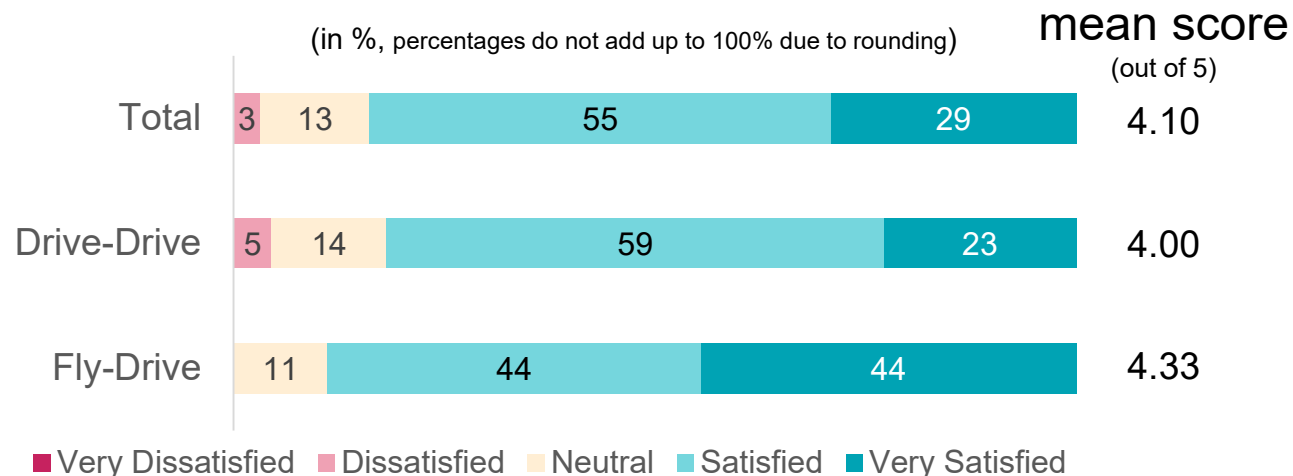
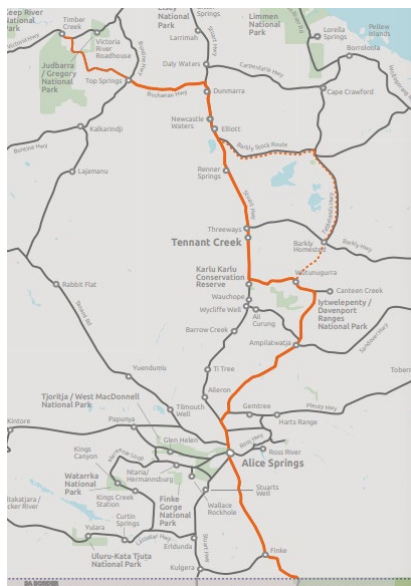
total sample by drive segment

9% driven

n=31

Drive-drive n=22*

Fly-Drive n=9*



- 29% are very satisfied with the Binns Track drive route, 55% satisfied.
- 3% were dissatisfied. The average satisfaction score was 4.1 (out of 5).
- Satisfaction is stronger among the Fly-Drive segment (4.33 compared with 4.00 for the Drive-Drive segment).

Due to lack of internet reception in certain areas, especially in National Parks. Travellers cannot book into a camp site if they decided they wanted to stay after seeing the beautiful views. The lack of connectivity compromises the spontaneous experience that many travellers hope to have with a drive holiday.

Tourists reported having great contact with Aboriginal people when stopping at the roadhouse and having conversations with Aboriginal people. They shared stories and traditions of their Aboriginal culture, such as hunting, how to prepare and cook a kangaroo on fire and where to see traditional women. However, they learned that taking photographs was forbidden. These kinds of authentic experiences make the drive experience highly memorable.

*small sample size. Interpret with caution

Base: Sample size as indicated above

Source: IC14. On a scale from 1 to 5, with 1 being 'Very Dissatisfied' and 5 being 'Very Satisfied', how would you rate your overall driving holiday experience at each of the following routes and locations you have been on/to?

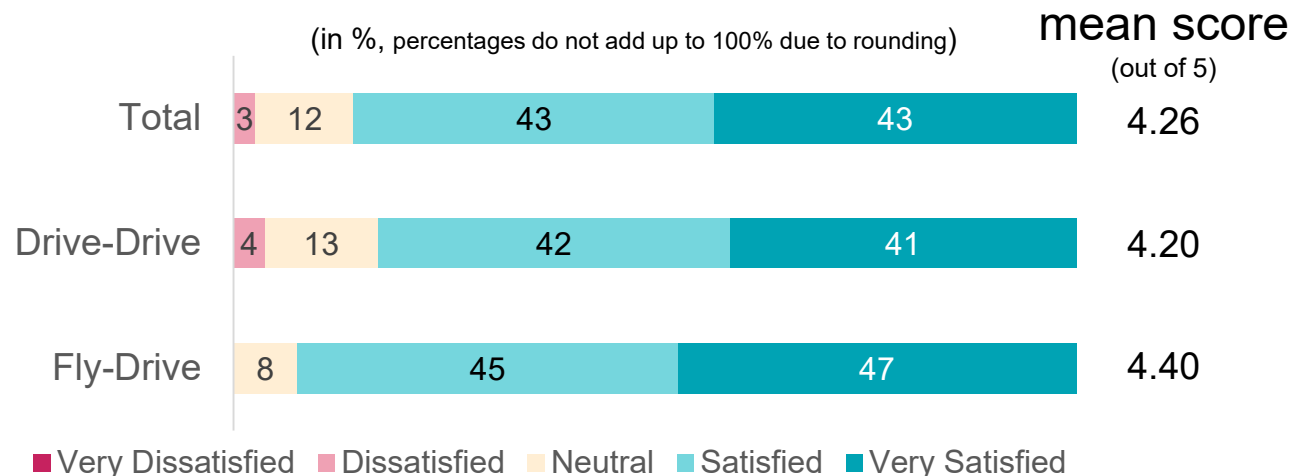


How satisfied were users of the Explorers Way (Stuart Highway)?

total sample by drive segment

56% driven
n=189

Drive-drive n=134
Fly-Drive n=53



- 43% are very satisfied with the Explorers Way drive route, 43% satisfied (average score was 4.26 out of 5).
- 3% were dissatisfied.
- Satisfaction is stronger among the Fly-Drive segment (4.40 compared to 4.20 for the Drive-Drive segment).

There were several specific calls for improvements and increasing the number of free overnight places to stay. There were also requests for potable drinking water to be made available at these overnight stay destinations especially those adjacent to the main roads.

Travellers reported that some equipment in roadhouses didn't work occasionally. Travellers recognise that it can take time to repair, but there was a sense that repairs were not conducted urgently and that the roadhouses were generally run down. Not having the equipment means many travellers go on the road without coffee or food and end up frustrated.

Alice Springs Airport doesn't open till 7:30am. Some drive travellers report having arrived early and feel confused. They couldn't find signage about this and had to wait outside the airport.

*small sample size. Interpret with caution

Base: Sample size as indicated above

Source: IC14. On a scale from 1 to 5, with 1 being 'Very Dissatisfied' and 5 being 'Very Satisfied', how would you rate your overall driving holiday experience at each of the following routes and locations you have been on/to?

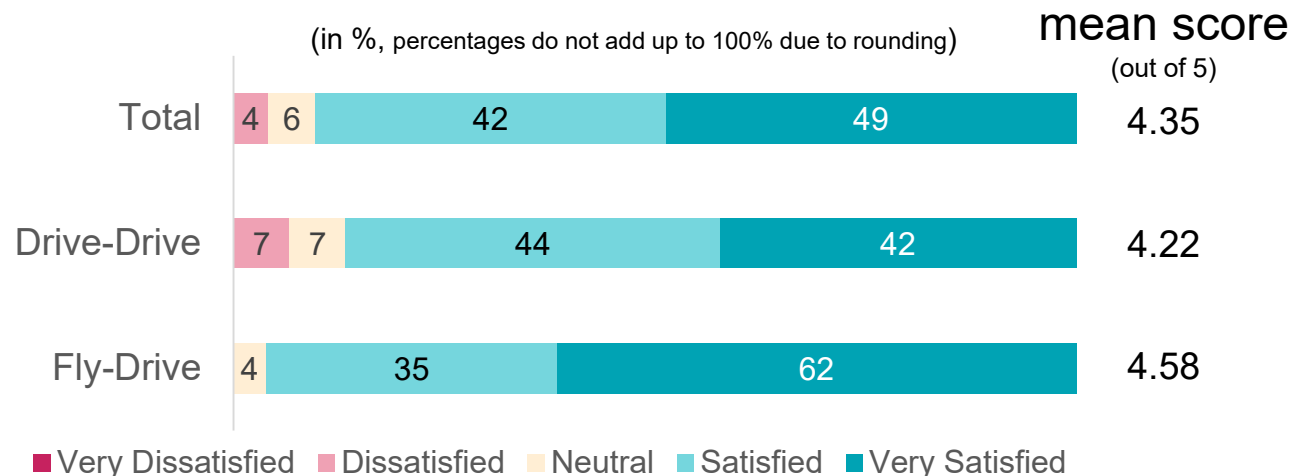


How satisfied were users of the Greater Litchfield Loop?

total sample by drive segment

21% driven
n=72

Drive-drive n=45
Fly-Drive n=26*



The data revealed that drive travellers in groups (without children) and aged 18-34 were significantly more likely to be dissatisfied with the Greater Litchfield Loop.

The toilet in the Litchfield national park received several very bad reviews. One couple commented that a few stalls in the toilet at Wangi Falls café were taped (unavailable), and another was full of rubbish.

Several reported the need for more signage as to how to find the Darwin airport or to get between the Darwin airport to the city. Only one side of the road has the sign to Darwin airport (on McMillans Road).

- 49% are very satisfied with the Greater Litchfield Loop drive route, 42% satisfied. The average satisfaction score was 4.35 out of 5)
- 4% were dissatisfied.
- Satisfaction is stronger among the Fly-Drive segment (4.58 compared with 4.22 for the Drive-Drive segment).

*small sample size. Interpret with caution

Base: Sample size as indicated above

Source: IC14. On a scale from 1 to 5, with 1 being 'Very Dissatisfied' and 5 being 'Very Satisfied', how would you rate your overall driving holiday experience at each of the following routes and locations you have been on/to?

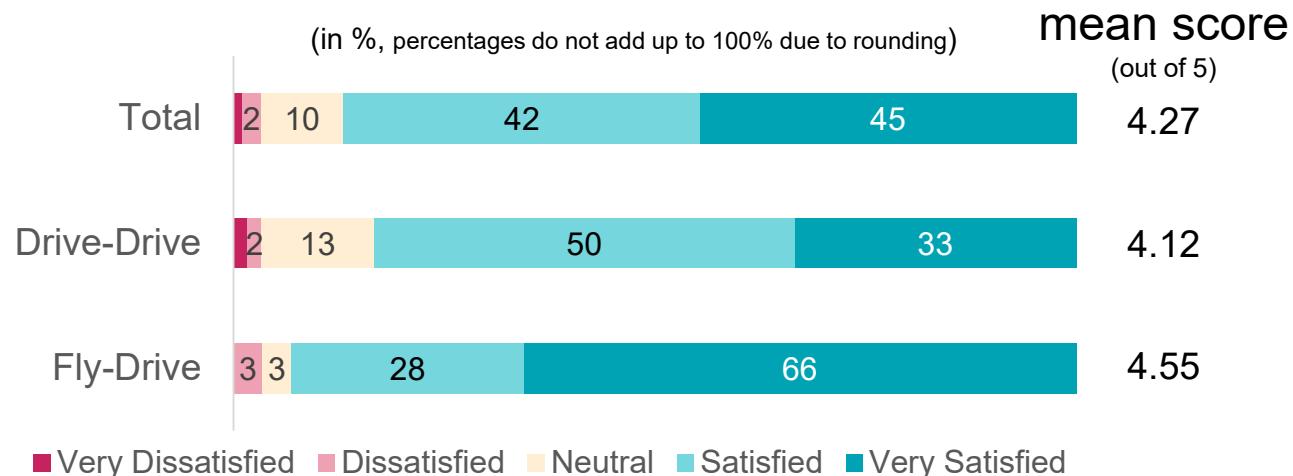


How satisfied were users of the Kakadu Loop?

total sample by drive segment

27% driven
n=92

Drive-drive n=60*
Fly-Drive n=29*



- 45% are very satisfied with the Kakadu Loop drive route, 42% satisfied. The average score was 4.27 out of 5).
- 3% were dissatisfied overall.
- Satisfaction is stronger among the Fly-Drive segment (4.55 compared to 4.12 for the Drive-Drive segment).

There were several calls for better signage around bushfires which were present at the time of interviewing. As one traveller reported, "we weren't informed about the Kakadu Bush fire, and we drove past a fire that was very dangerous and there was extremely low visibility. This was very unsafe".

"The dirt roads in Kakadu were a disgrace, and I don't think they've been improved in years. I wish I hadn't wasted my money and time in Kakadu, except for the Ubirr Rock Art and Sunset experience and spent more time in Litchfield!"

"There needs to be improvements to the Kakadu NP experience, especially focusing on grading the dirt roads such as the one to Jim Tukaram Falls road and providing access to drinking water in the park like there is at Uluru and in the West MacDonnell ranges"

*small sample size. Interpret with caution

Base: Sample size as indicated above

Source: IC14. On a scale from 1 to 5, with 1 being 'Very Dissatisfied' and 5 being 'Very Satisfied', how would you rate your overall driving holiday experience at each of the following routes and locations you have been on/to?



How satisfied were users of the Red Centre Way?

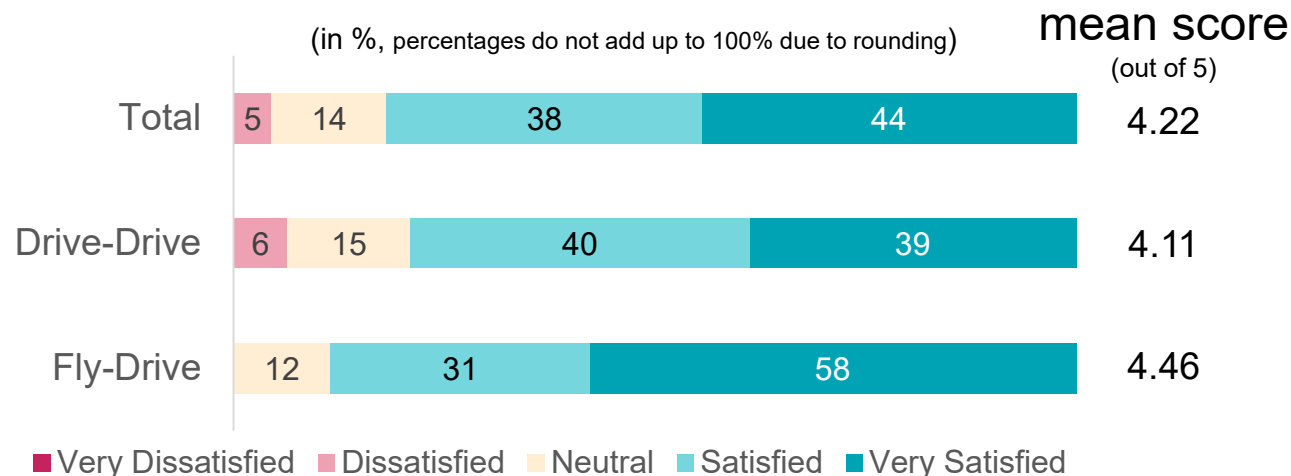
total sample by drive segment

26% driven

n=88

Drive-drive n=62

Fly-Drive n=26*



- 44% are very satisfied with the Red Centre Way drive route, 38% satisfied. The average satisfaction score was 4.22 out of 5.
- 5% were dissatisfied.
- Satisfaction is stronger among the Fly-Drive segment (4.46 compared to 4.11 for the Drive-Drive segment).

A drive holiday from the southern cities and regional areas to Uluru can comfortably fit in the school holiday period but school holiday limitations means a longer trip to the tropical north is out of range.

There were several adverse reports about the roads. Some reported that the initial 80km of Lasseter Hwy to Erldunda is narrow, and drive travellers have to compete with the road trains, which also use this road and dominate the available space. Mount Ebenezer Roadhouse (on Lasseter Hwy) is now permanently closed, and it is close to 200km without a toilet stop on the road.

The road condition of the Mereenie Loop "is a shocker", which introduces much vibration of equipment and breaks them. Road signage in Yulara was also reported to need some improvement. Travellers often rely on Google Maps to get around as road signage is poor.

Other Fly-Drive travellers report that "the mileage aspect of the vehicle rental charge is too steep. I rented with Thrifty they only gave 600 free kms and everything was extra after that. Just Alice Springs to Uluru is 439 kms so you get slapped by a massive bill. "

"It would be great if the Ernest Giles road was sealed, so you would be able to drive on it with a hire car and make the drive from Kings Canyon to Alice Springs much shorter"

*small sample size. Interpret with caution

Base: Sample size as indicated above

Source: IC14. On a scale from 1 to 5, with 1 being 'Very Dissatisfied' and 5 being 'Very Satisfied', how would you rate your overall driving holiday experience at each of the following routes and locations you have been on/to?

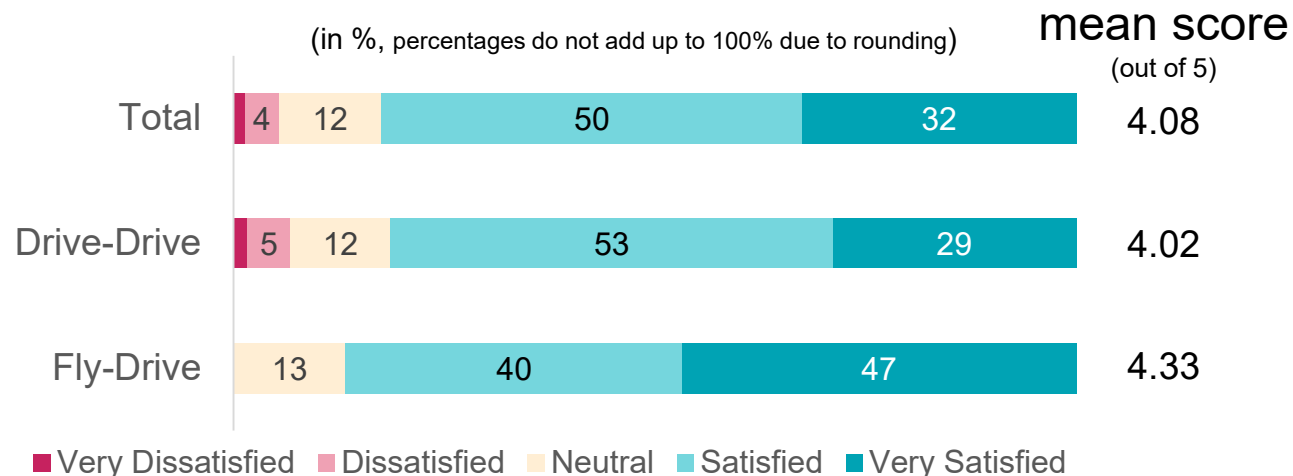


How satisfied were users of the Savannah Way?

total sample by drive segment

22% driven
n=74

Drive-drive n=59
Fly-Drive n=15*



- 32% are very satisfied with the Savannah Way drive route, 50% satisfied. The average satisfaction score was 4.08 out of 5.
- 5% were dissatisfied overall.
- Satisfaction is stronger among the Fly-Drive segment (4.33 compared to 4.02 for the Drive-Drive segment).

Drive travellers expect signage that indicates the state of the road before they become committed to using it. If a road is rough, it needs to be better promoted that it is unfit for hired campervans. This was especially reported to be the case for the Savannah Highway towards Hells Gates east of Borroloola.

“Fix up some of the roads from Borroloola to Hells gate so people can spend more time in these outback areas.” On the other hand, the challenging road conditions make it an exciting adventure for tourists. Borroloola is seeing an increasing number of families, backpackers, motorcyclists and fishing tourists.

“Road from Kununurra to Timber creek also has lots of potholes and needs to be taken better care of.”

*small sample size. Interpret with caution

Base: Sample size as indicated above

Source: IC14. On a scale from 1 to 5, with 1 being 'Very Dissatisfied' and 5 being 'Very Satisfied', how would you rate your overall driving holiday experience at each of the following routes and locations you have been on/to?



3b do the NT Drive holiday **regions** satisfy travellers?

How satisfied were visitors to the Alice Springs & MacDonnell Ranges region?



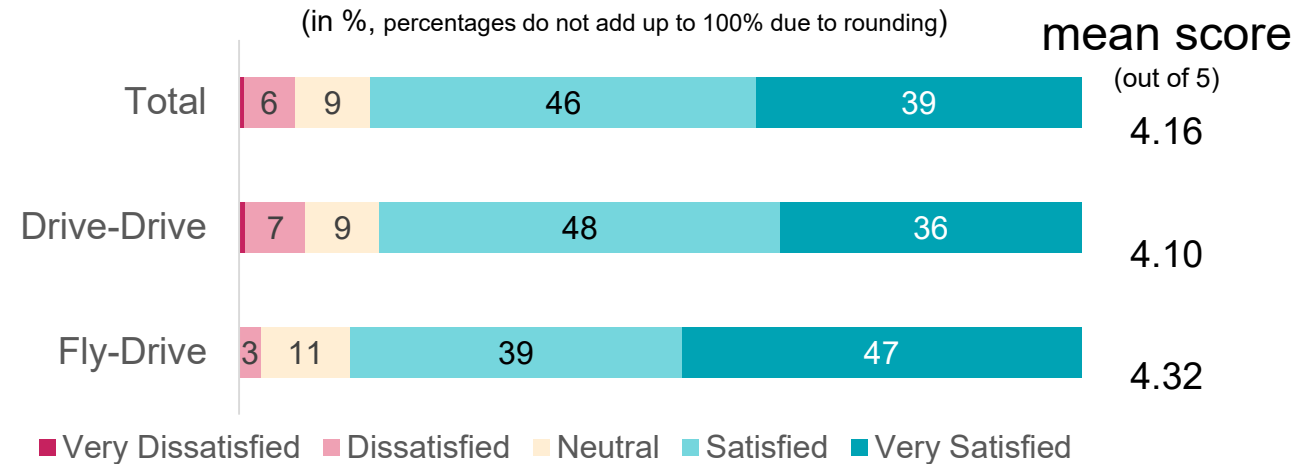
total sample by drive segment

49% visited

n=166

Drive-drive n=126

Fly-Drive n=38



- 39% are very satisfied with the Alice Springs & MacDonnell Ranges region, 46% satisfied.
- 7% were dissatisfied overall.
- Satisfaction is stronger among the Fly-Drive segment (4.32 compared to 4.10 for the Drive-Drive segment).

Safety is one of the big concerns in this region, especially in connection with the town centre of Alice Springs. Caravan parks generally send out friendly reminders to tourists to lock up their vehicles, cabins and secure any items of value. They also offer the phone number of the local police. While valuable, these safety reminders help set the scene that there is a sense that security is an issue.

More than half of the drive travellers who stayed in Alice Springs mentioned they had personally experienced petty crime. This included windows getting broken and visitors needing to stay in the town for extra time to get the windows replaced. This kind of event disrupted holiday planning and prevented some drive travellers from getting to some of the places they wanted to visit in the NT.

The Alice Springs city centre had many local shops that had closed, and this generated an unpleasant vibe. Word-of-mouth safety warnings were issued to women not to walk alone and to be especially careful when walking through groups of Aboriginal men. Some reported hearing stories that women were slapped on the face when walking past a group of Aboriginal women. Police often arrived too late and could not do much anyway, and even the security people were often scared of the situation.

“The only frustrating part of the trip was purchasing a park pass for Kings Canyon. The pass was required for every visitor, but we found that it was difficult to find any mobile service to allow us to buy the pass. Mobile reception at Kings Canyon Resort is poor (even though Telstra says we have full 4G reception), and the Wi-Fi was not working either. I don't mind going places that don't have mobile service, but there should be another way to purchase a park pass if mobile reception isn't available.”

Base: Sample size as indicated above

Source: IC14. On a scale from 1 to 5, with 1 being 'Very Dissatisfied' and 5 being 'Very Satisfied', how would you rate your overall driving holiday experience at each of the following routes and locations you have been on/to?

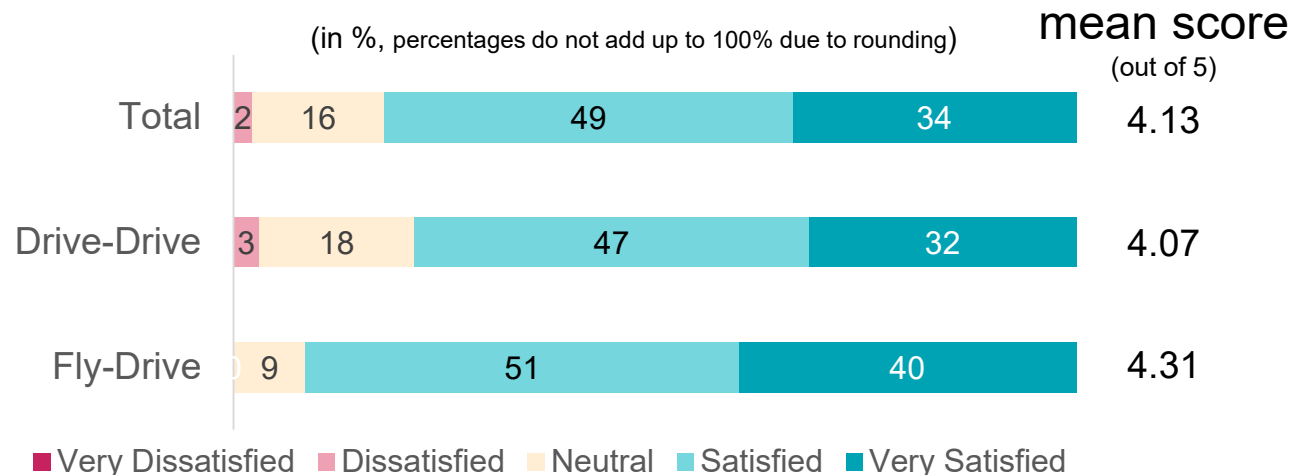


How satisfied were visitors to the Big Rivers region?

total sample by drive segment

**40% visited
n=134**

Drive-drive n=98
Fly-Drive n=35



- 34% are very satisfied with the Big Rivers region, 49% satisfied.
- 2% were dissatisfied.
- Satisfaction is stronger among the Fly-Drive segment (4.31 compared to 4.07 for the Drive-Drive segment).

There was a comment that the hours and days one can buy beer (alcoholic drinks) are constrained, which was a turn-off for some tourists.

Many of the adverse reports about the NT came through media reports. One example was the media reporting that highly dangerous criminals were being transferred to Katherine at the time (in September), which added to any adverse word of mouth comments suggesting that Katherine is a dangerous place.

“The government also needs to support roadhouses so they can stay open e.g. Emerald Springs.”

“They need to do more work with the Police museum (near Timber Creek Police Station). It has a lot of content on the Australians having to fight the Japanese alongside our First Nation’s people. It seems to be currently looked after by volunteers and had received limited fundings. If the content can be digitised by an experienced curator, Timber Creek could be on the map internationally.”

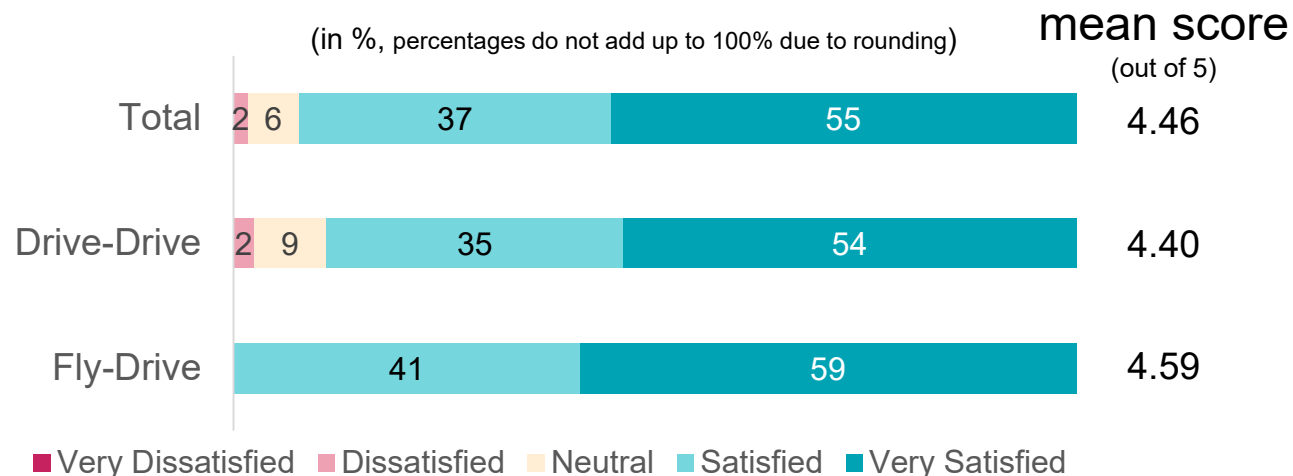


How satisfied were visitors to the Lasseter region?

total sample by drive segment

34% visited
n=116

Drive-drive n=82
Fly-Drive n=34



- 55% are very satisfied with the Lasseter region, 37% satisfied.
- 2% were dissatisfied.
- Satisfaction is slightly stronger among the Fly-Drive segment (4.59 compared to 4.40 for the Drive-Drive segment).

Drive travellers regularly commented about the lack of vegetarian options in the Uluru area, but that this was also the case during their NT trip in general.

The area was perceived to be extremely safe and well looked after. But the result was that some perceived the area as “too commercial”.

Uluru (at Voyages) was where drive travellers could see the efforts to support local Indigenous employment, and many commented favourably on this. Many drive-travellers interacted with Aboriginal people and saw them working on their own land. The region was also seen to be very accessible, and the area was well-equipped to provide mechanical services when needed.

The King’s Canyon experience was highly satisfying except that access to digital services were poor. However, one drive traveller commented that at least having a public phone present on one of the walks was reassuring.

Base: Sample size as indicated above

Source: IC14. On a scale from 1 to 5, with 1 being 'Very Dissatisfied' and 5 being 'Very Satisfied', how would you rate your overall driving holiday experience at each of the following routes and locations you have been on/to?

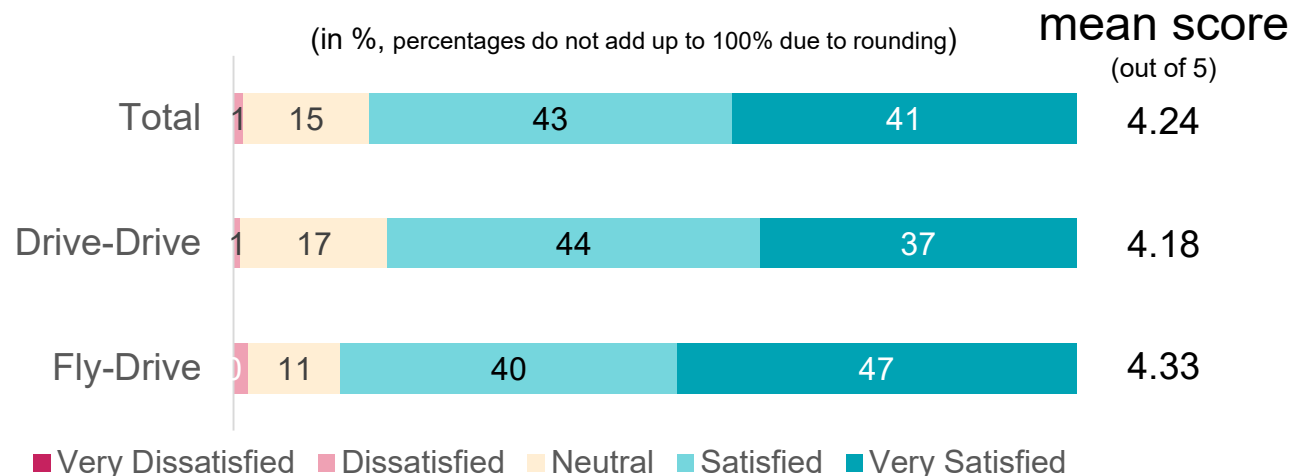


How satisfied were visitors to the Greater Darwin region?

total sample by drive segment

**51% visited
n=174**

Drive-drive n=115
Fly-Drive n=55



- 41% are very satisfied with the Greater Darwin region, 43% satisfied.
- 1% were dissatisfied.
- Satisfaction is slightly stronger among the Fly-Drive segment (4.33 compared to 4.18 for the Drive-Drive segment).

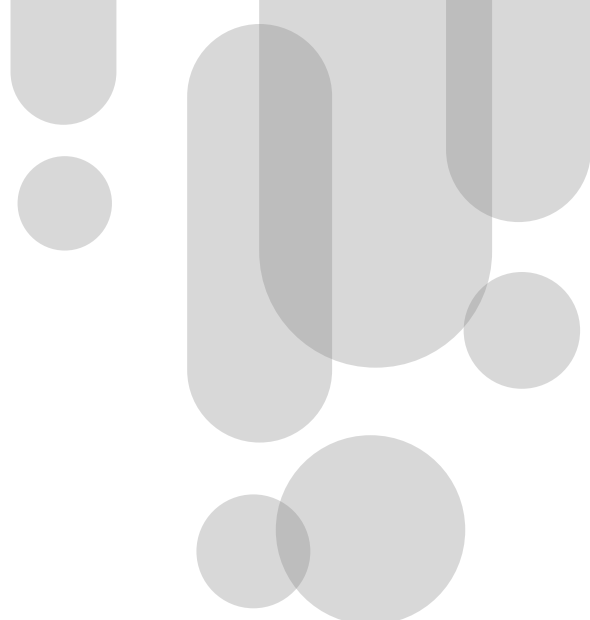
The waterholes, especially Florence Falls, were thought to offer great amenity and the campgrounds provided were very appealing and satisfying.

For those driving their own vehicle, the town centre of Darwin was perceived unsafe for caravanners. The caravan park in Karama was mentioned by several respondents. In contrast, caravan parks further out from the City Centre, such as the caravan park in Coolalinga, were perceived as safer.

“Would be nice to have some camping options closer to the city of Darwin.”

“The paid campsites in the national parks near Darwin were beautiful. The only thing that let some down when you’re paying \$30 a night is that some toilets look like a bomb site. They should attend to these more often if they are charging that amount of money.”

“The facilities in the Litchfield NP require more regular attention. E.g. Sandy Creek campsite had no water, and all the facilities were blocked and overflowing. The other campsites and day-use areas were also in need of attention”



3c do the NT Drive **facilities and services** satisfy travellers?



Satisfaction with facilities used on the NT drive experience

total sample

Mean score (out of 5)
Green highlight better satisfaction score, while **red** highlight lower satisfaction score

	n=	Total	Drive-Drive	Fly-Drive	Planner	Spontaneous	Sole travellers	Group travellers with children	Group travellers without children 18-34	Group travellers without children 35-54	Group travellers without children 55+
Road signage	206	4.11	4.04	4.23	4.11	4.09	4.29	3.94	4.06	4.17	4.20
Visitor information/Visitor centre/Kiosk	138	4.06	3.97	4.23	4.23	3.91	4.06	4.08	3.86	4.24	4.16
EV charging availability	11*	4.00	3.89	4.50	4.40	3.67	3.50	5.00	3.80	4.00	
Fuel availability	298	3.99	3.97	4.01	3.97	3.95	4.00	3.97	3.90	4.09	4.06
Vehicle hire	86	3.94	3.85	3.98	3.97	3.79	3.56	4.22	3.61	3.93	4.24
Road condition	338	3.94	3.90	4.05	3.91	3.87	4.02	3.87	3.99	3.90	3.92
Rest stops/bays	205	3.87	3.85	3.94	3.79	3.95	4.11	3.96	3.84	4.04	3.62
Motor vehicle mechanical support	62	3.82	3.83	3.80	3.80	3.58	4.00	3.88	4.00	3.80	3.50
Public toilets	230	3.63	3.61	3.66	3.69	3.48	3.81	3.79	3.46	3.70	3.52
Mobile reception/Internet signal availability	137	2.97	2.99	2.93	3.09	2.88	2.86	3.14	3.00	3.10	2.76

• The key areas of dissatisfaction, based on those who experienced the facilities, were with the lack of mobile reception. This impacted every drive traveller segment to varying degrees. Mobile reception (2.97 out of 5) was followed by the poor quality of public toilets (3.63 out of 5); then mechanical services (3.82) and the lack of / and quality of facilities at rest stops (3.87).

*small sample size, interpret with caution



Satisfaction with food and accommodation services used

total sample by drive segment, attitude towards planning and travel groups

Mean score (out of 5)
Green highlight better satisfaction score, while **red** highlight lower satisfaction score

	n=	Total	Drive-Drive	Fly-Drive	Planner	Spon-taneous	Sole travellers	Group travellers with children	Group travellers without children 18-34	Group travellers without children 35-54	Group travellers without children 55+
Camping	148	4.20	4.18	4.21	4.17	4.25	4.11	4.13	4.21	4.18	4.34
Hotel/motel/cabin	121	4.09	4.11	4.04	4.13	4.12	3.90	4.44	3.97	3.86	4.15
Hipcamp or similar	26*	4.04	4.00	5.00	4.25	4.00	3.00	3.43	4.33	4.67	4.75
National Park campground	115	4.03	3.95	4.24	3.95	4.12	4.33	3.81	4.03	4.43	4.00
Commercial caravan/camping site	128	4.02	3.99	4.14	4.09	3.98	3.93	4.19	3.89	4.07	3.97
Roadhouse	109	3.99	3.98	4.05	4.04	3.92	4.36	3.89	4.20	4.00	3.82
Food and drink	272	3.90	3.94	3.86	3.99	3.81	3.95	3.97	3.75	4.16	3.84
Restaurants and cafes	218	3.85	3.81	3.90	3.88	3.82	3.63	3.98	3.72	4.04	3.87
Farm stays	27*	3.81	3.79	4.00	3.73	3.92	3.00	3.80	4.00	3.83	3.80
Free camping	110	3.79	3.77	4.00	3.50	3.87	3.94	3.71	3.83	3.50	3.79

“Would be great to have more free camping sites”
“Not enough dump points”

• The key area of dissatisfaction, based on those who experienced these services, was the lack of free camping. This impacted every drive traveller segment to varying degrees. The lack of free camping (3.79 out of 5) was followed by the poor quality of restaurants and cafés (3.85), food and drink (3.90 out of 5) and then the poor quality of roadhouses (3.99).



Satisfaction with health, accessibility and safety services used

total sample by drive segment, attitude towards planning and travel groups

Mean score (out of 5)
Green highlight better satisfaction score, while **red** highlight lower satisfaction score

	n=	Total	Drive-Drive	Fly-Drive	Planner	Spon-taneous	Sole travellers	Group travellers with children	Group travellers without children 18-34	Group travellers without children 35-54	Group travellers without children 55+
Healthcare providers (e.g. doctor, physio visits)	52	3.54	3.63	3.25	3.48	3.50	3.93	3.47	3.56	3.29	3.00
Accessible facilities	41	3.66	3.81	3.33	3.56	3.73	3.75	3.67	4.00	3.50	3.22
Safety to me and my belongings	124	3.65	3.61	3.75	3.84	3.33	3.58	3.72	3.69	4.36	3.11

Safety and social issues in town centres (Darwin, Katherine, Tennant Creek, and Alice Springs, where there are larger populations) were seen to have a higher risk of petty crime. Some travellers found it unpleasant to visit where people walked or slept on the roadside in town centres. Travellers enjoyed the areas with fewer people and where social issues were out of sight.

“Stop pushing the Indigenous aspect so much. Not impressed with the safety in many places. The razor wire around some of our caravan parks was telling as it was being bailed up by aggressive/drunk individuals with their foul-mouthed racist rants. When my sister-in-law (who lives in Alice Springs) explained that the white paint on letter boxes was part of a code that warned other potential Indigenous burglars that there were guard dogs at those premises, I was appalled. It got to the stage that we were glad to get back to Three Ways and head off to Qld. I am a member of a caravan club and we discuss these issues and warn each other about safety issues. If you want tourists to report good experiences (so that others will go there), then you need to stop pretending about this huge issue.”

“I was more concerned when staying in Tennant Creek after what I had read on social media. Buying a 6 pack of beer in Alice Springs was very confronting with kids in the car, and they were Darwin residents. The aggressive nature of the way I was asked questions was a low light.”

“Every roadhouse/caravan park with a bar often had noisy and somewhat intimidating Aboriginals coming in with beat-up cars in multiple groups. When driving, you might see a collection of young Indigenous boys lighting a fire, and the only option was to call the police. Is there a different line to call or avenue to address this?”



Satisfaction with the NT experience

total sample by drive segment, attitude towards planning and travel groups

Mean score (out of 5)
Green highlight better satisfaction score, while **red** highlight lower satisfaction score

	n=	Total 338	Drive-Drive 225	Fly-Drive 106	Planner 127	Spon-taneous 114	Sole travellers 60	Group travellers with children 78	Group travellers without children 18-34 81	Group travellers without children 35-54 42	Group travellers without children 55+ 77
History and Heritage	103	4.43	4.36	4.56	4.40	4.50	4.33	4.32	4.30	4.73	4.50
National Parks	194	4.41	4.31	4.59	4.34	4.45	4.32	4.51	4.34	4.56	4.33
Guided tours	79	4.39	4.24	4.67	4.25	4.36	4.60	4.30	4.20	4.73	4.35
Adventure (Hiking/Mountain Biking/Fishing)	78	4.38	4.31	4.54	4.20	4.50	4.00	4.43	4.44	4.50	4.36
Overall tourist experience (tours/attractions/National parks etc.)	137	4.30	4.26	4.38	4.03	4.38	4.00	4.48	4.17	4.53	4.30
Cultural tourism products	94	4.29	4.17	4.55	4.37	4.18	4.13	4.39	4.00	4.54	4.39
4WD experience	80	4.23	4.19	4.35	4.21	4.28	3.90	4.33	4.11	4.40	4.32
Customer service	114	4.03	4.01	4.12	4.21	3.81	3.86	3.92	4.17	4.42	3.97
Quality of product or services	93	3.92	3.89	4.07	3.83	3.95	3.67	3.91	3.88	4.27	3.95
Booking products or services	137	3.88	3.89	3.87	4.09	3.65	4.37	3.74	3.69	4.15	3.78

• The key area of dissatisfaction with the visitor experience, based on those who experienced these aspects, was the difficulty booking products and services. This impacted every drive traveller segment to varying degrees except solo and group travellers 35-54 yrs. Booking (3.88 out of 5) was followed by slightly less-than-ideal quality tourism products and services (3.92 out of 5) and, to a lesser degree, the customer service they experienced (4.03 out of 5).

Base: Sample as indicated above

Source: IC21. [ASK IF CODED AT IC20] How satisfied are you with each of them?

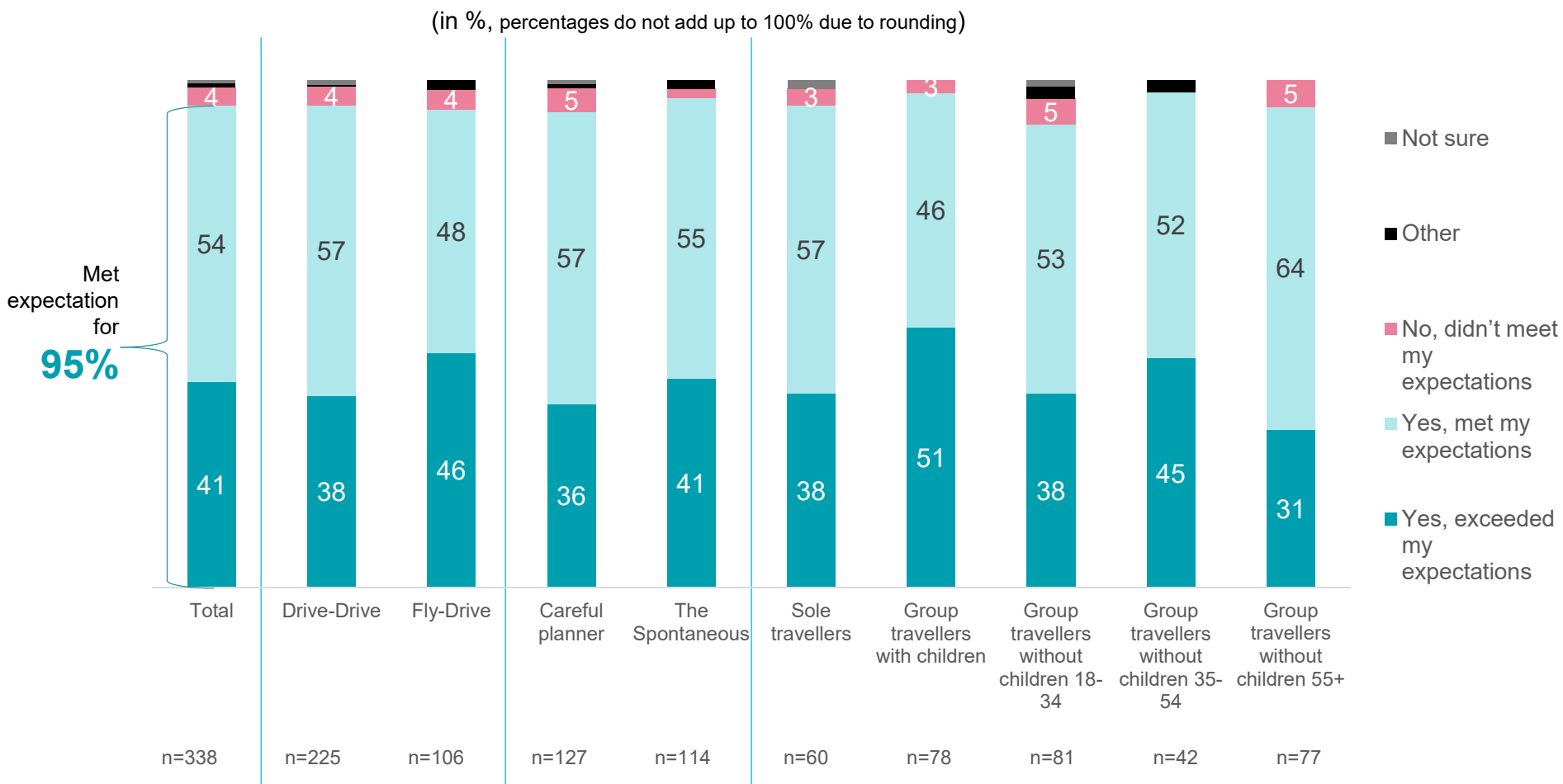


3d recommendation and returning to the NT



Are NT drive holidays meeting expectations?

total sample by drive segment, attitude towards planning and travel groups

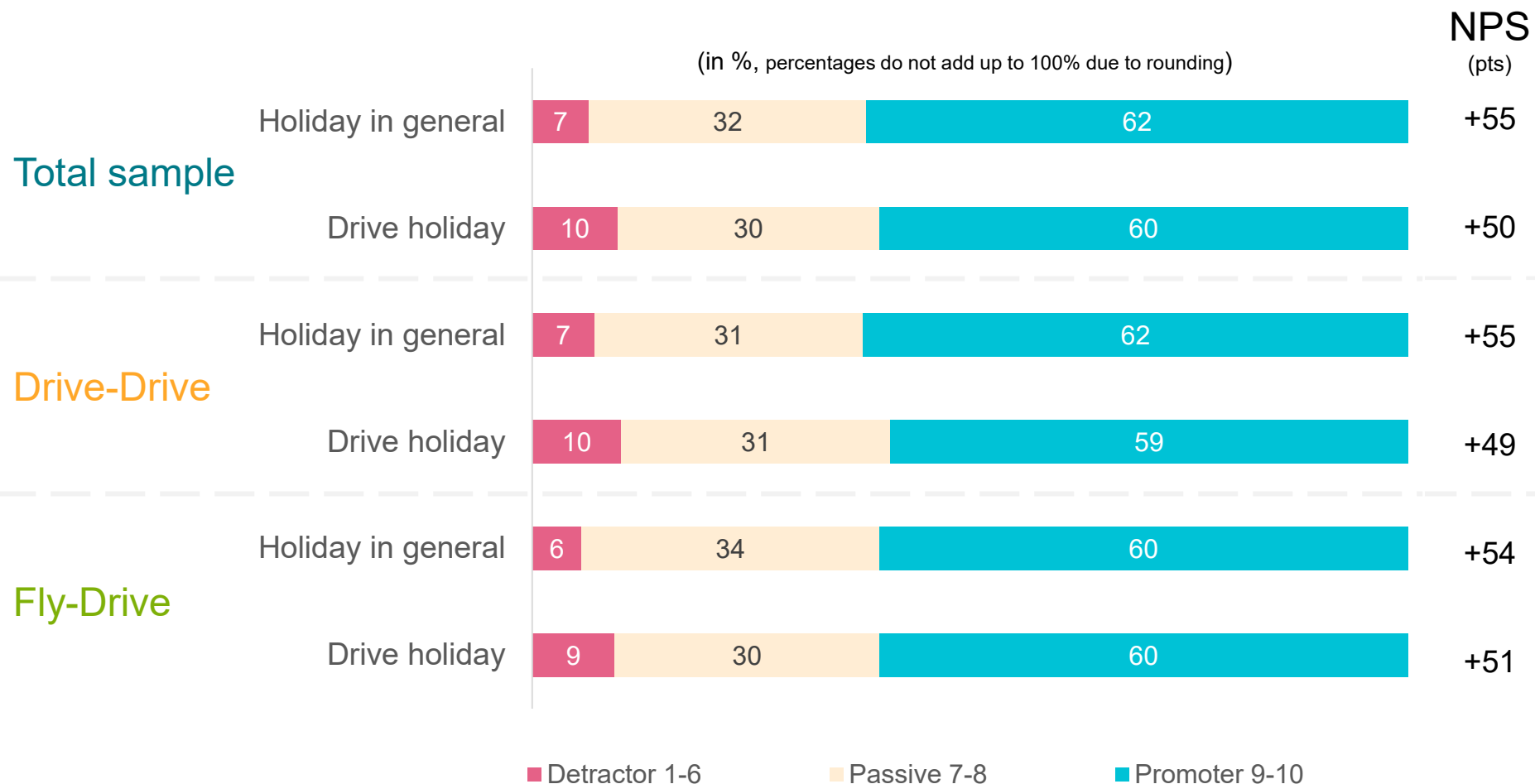


- The drive holiday met the expectation of 95% of the drive travellers interviewed.
- While none of the differences in this chart were statistically significant (with this limited sized sample) the indications were that the experience was more likely to satisfy those who were group travellers families with children.



Are drive travellers recommending the NT?

total sample by drive segment



- 62% of drive holiday visitors would recommend the NT for a holiday,
- 60% would recommend the NT for a drive holiday
- The promotion of the NT is relatively similar for the two drive segments.

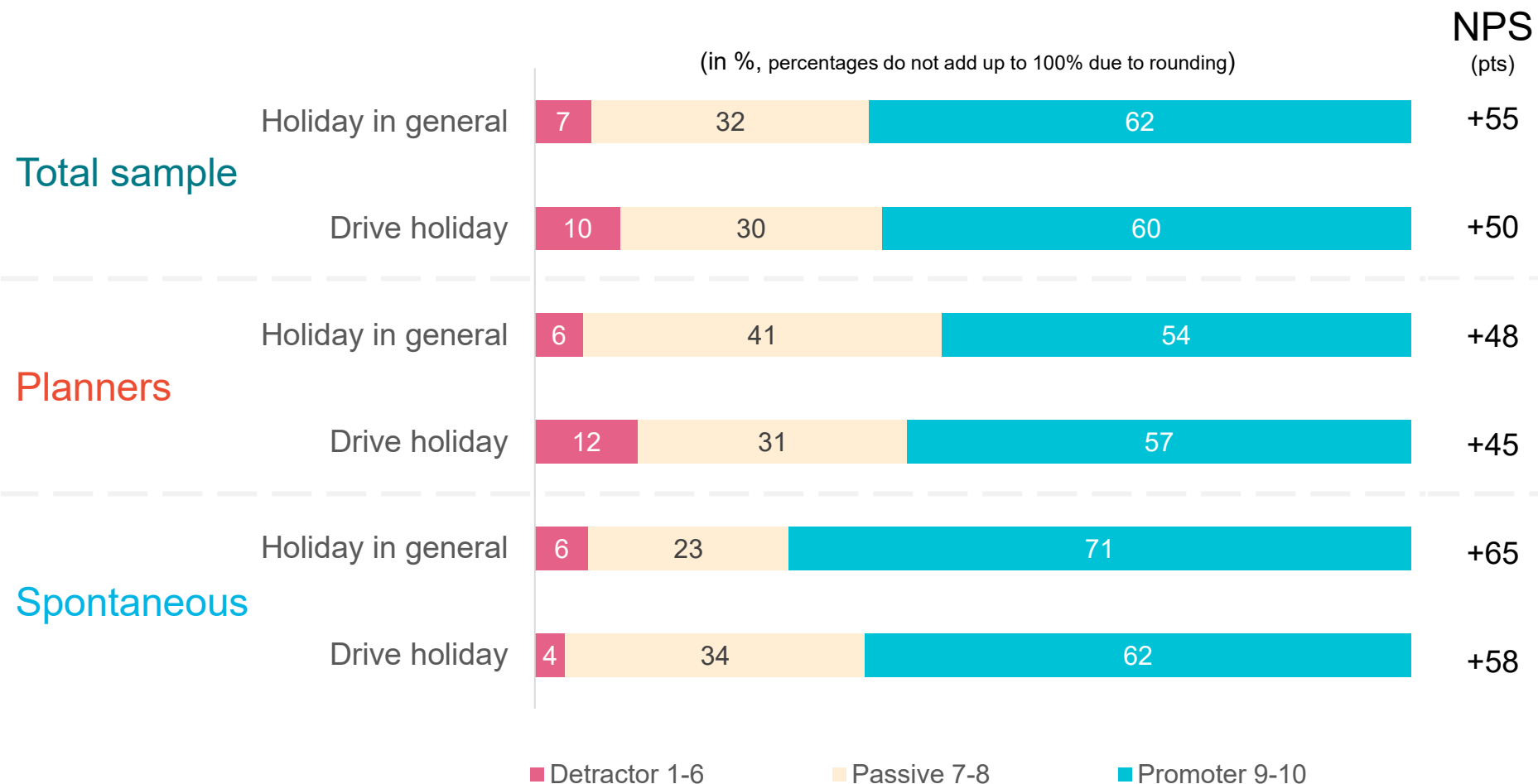
Base: Total sample n=338, Drive-Drive n=225, Fly-Drive n=106

Source: IC16. On the scale from 0 to 10, how likely are you to recommend the Northern Territory as a place for a holiday in general? IC17. To recommend the Northern Territory for a drive, fly/drive holiday?



Are drive travellers recommending the NT?

total sample by attitude towards planning



- There is a difference in propensity to recommend the NT between people who approach their drive holiday with a spontaneous attitude and those who plan their holiday carefully.
- Planners were less likely to recommend NT as a holiday destination in general as well as for a Drive holiday.

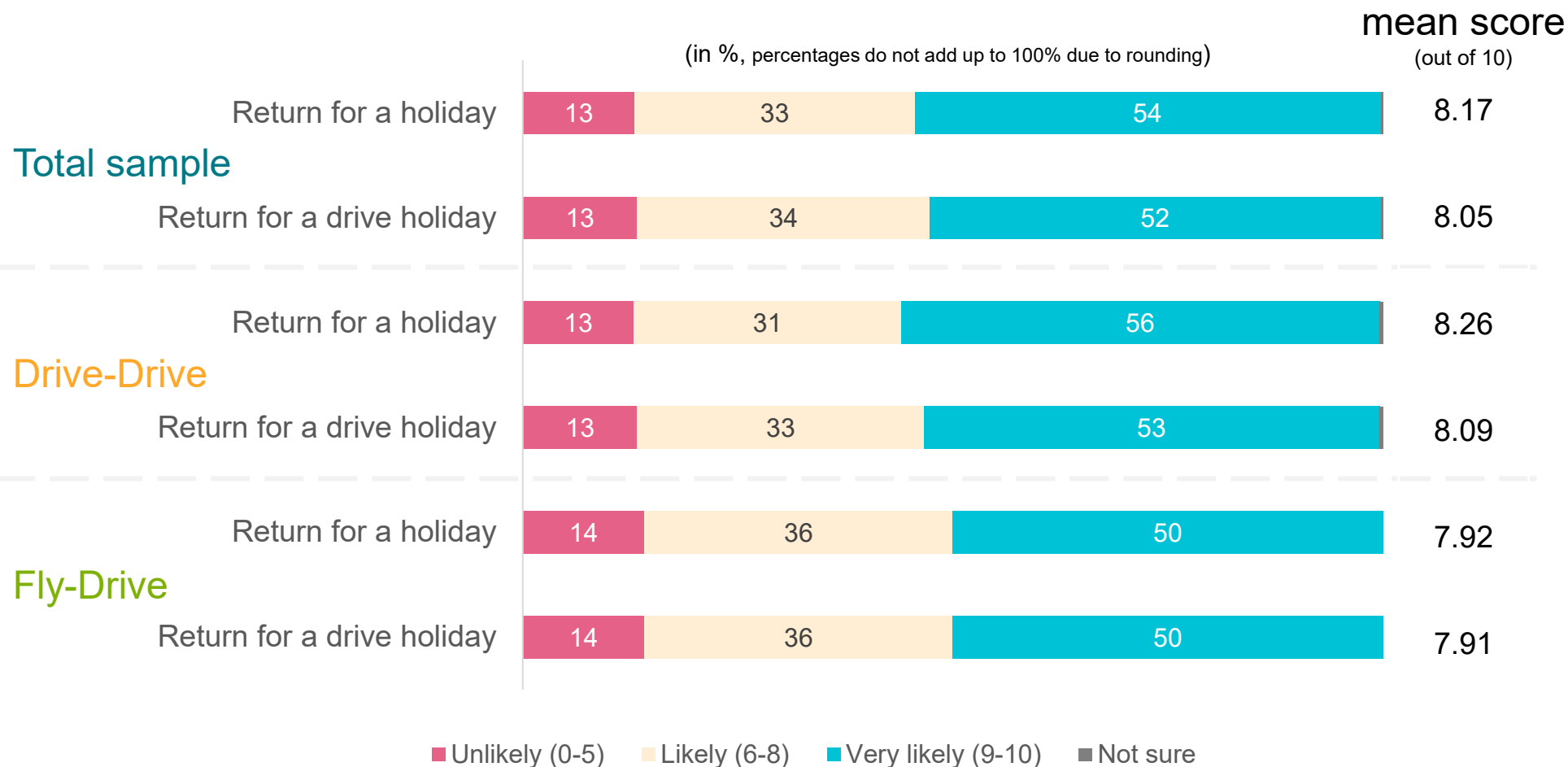
Base: Total sample n=338, Planner n=127, Spontaneous n=114

Source: IC16. On the scale from 0 to 10, how likely are you to recommend the Northern Territory as a place for a holiday in general? IC17. To recommend the Northern Territory for a drive, fly/drive holiday?



Will drive travellers return to the NT?

total sample by drive segment

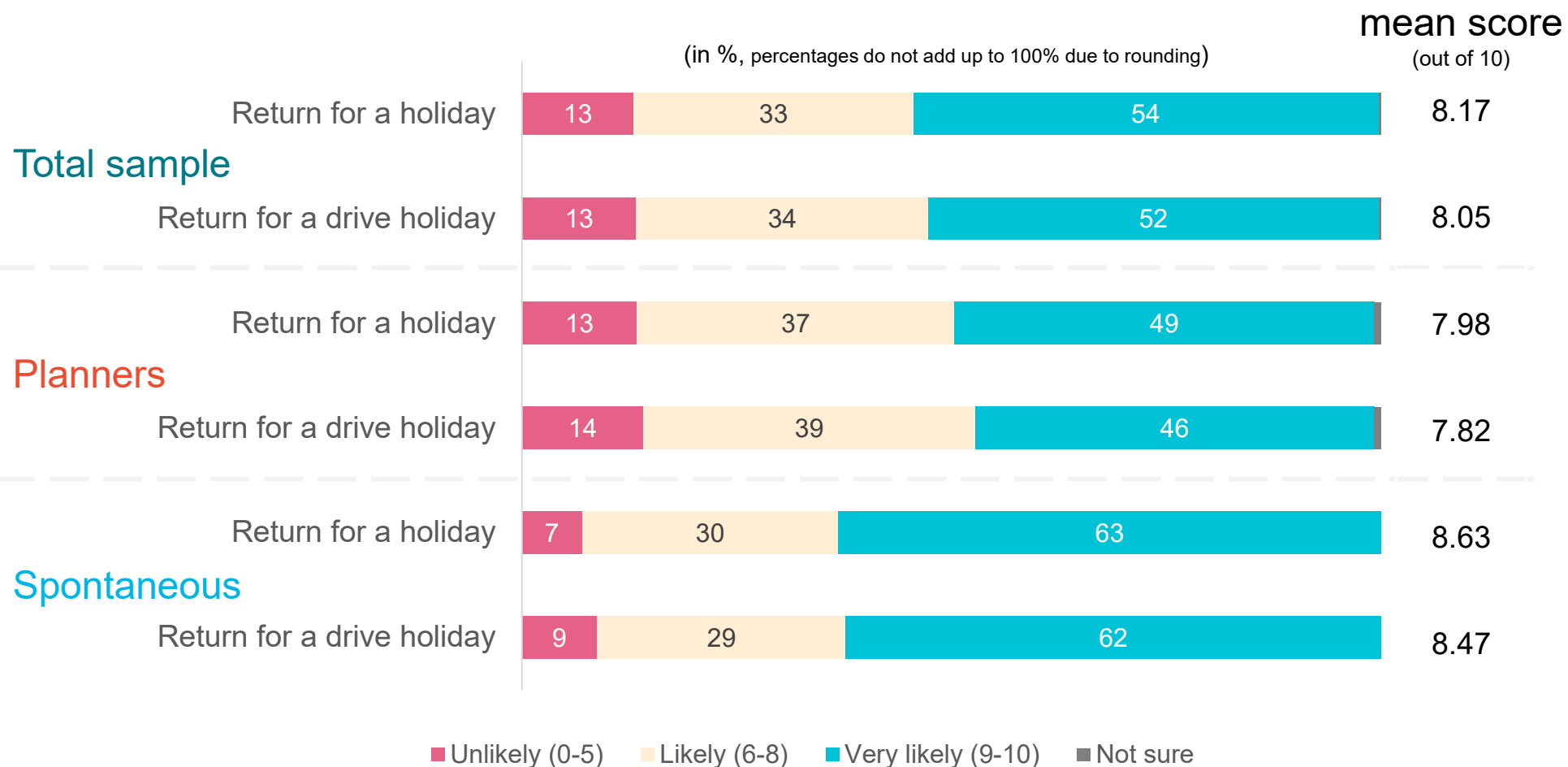


- 54% of all the drive travellers are very likely to return to the NT for a holiday and 52% for another drive experience.
- 13% will not, and 34% are somewhat likely to try the drive experience in the NT again.



Will drive travellers return to the NT?

total sample by drive segment



- Spontaneous drive travellers are more likely to return to the NT for a holiday (63%) and for a drive holiday (62%)
- This compares to planners with only 49% intending to return to the NT for a holiday and 46% for a drive holiday.



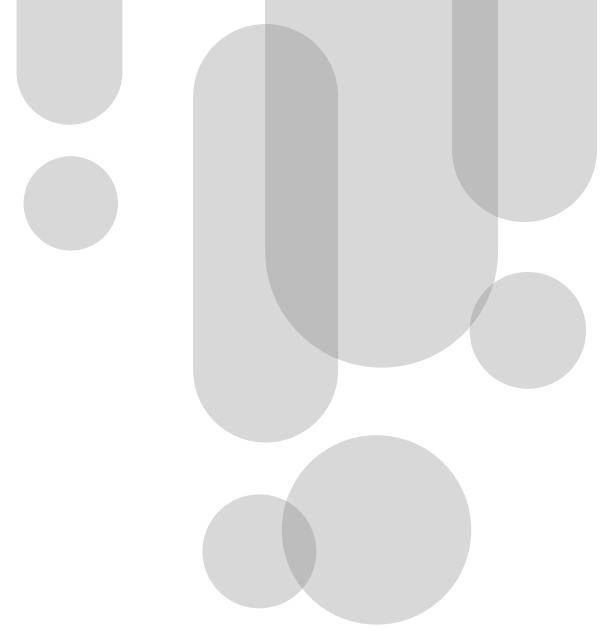
How long before the drive travellers return to the NT?

sample who intend to return for a holiday, by drive segment

Driven by age, 55+ are more likely unsure (15%)



- 11% of drive travellers will return to the NT within a few months and 31% within one year.
- Those who drove to the NT for their holiday are more likely to return earlier than those who had a Fly-Drive experience.

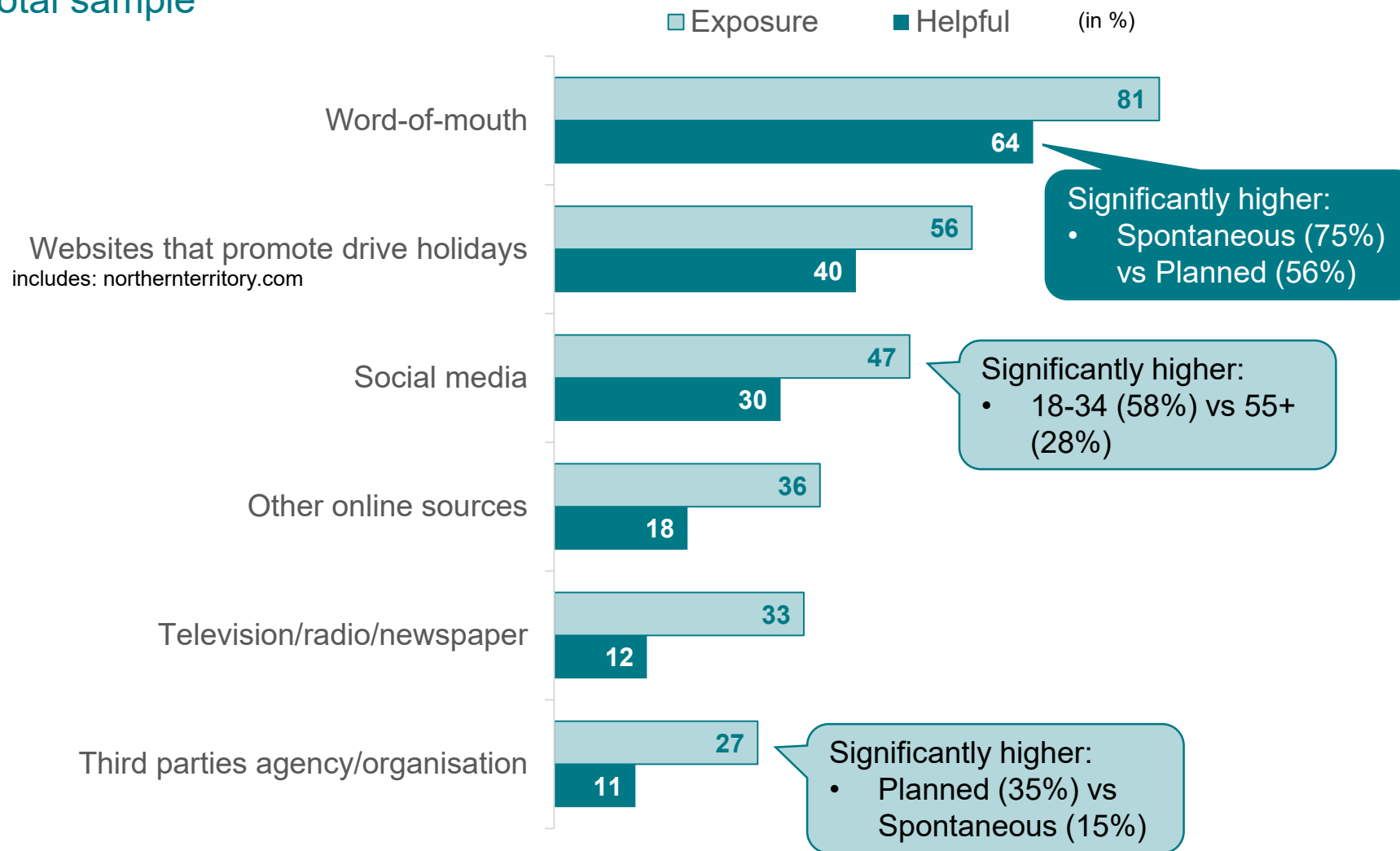


3e driving holiday information sources



Where did travellers get their information about the NT drive holiday?

total sample

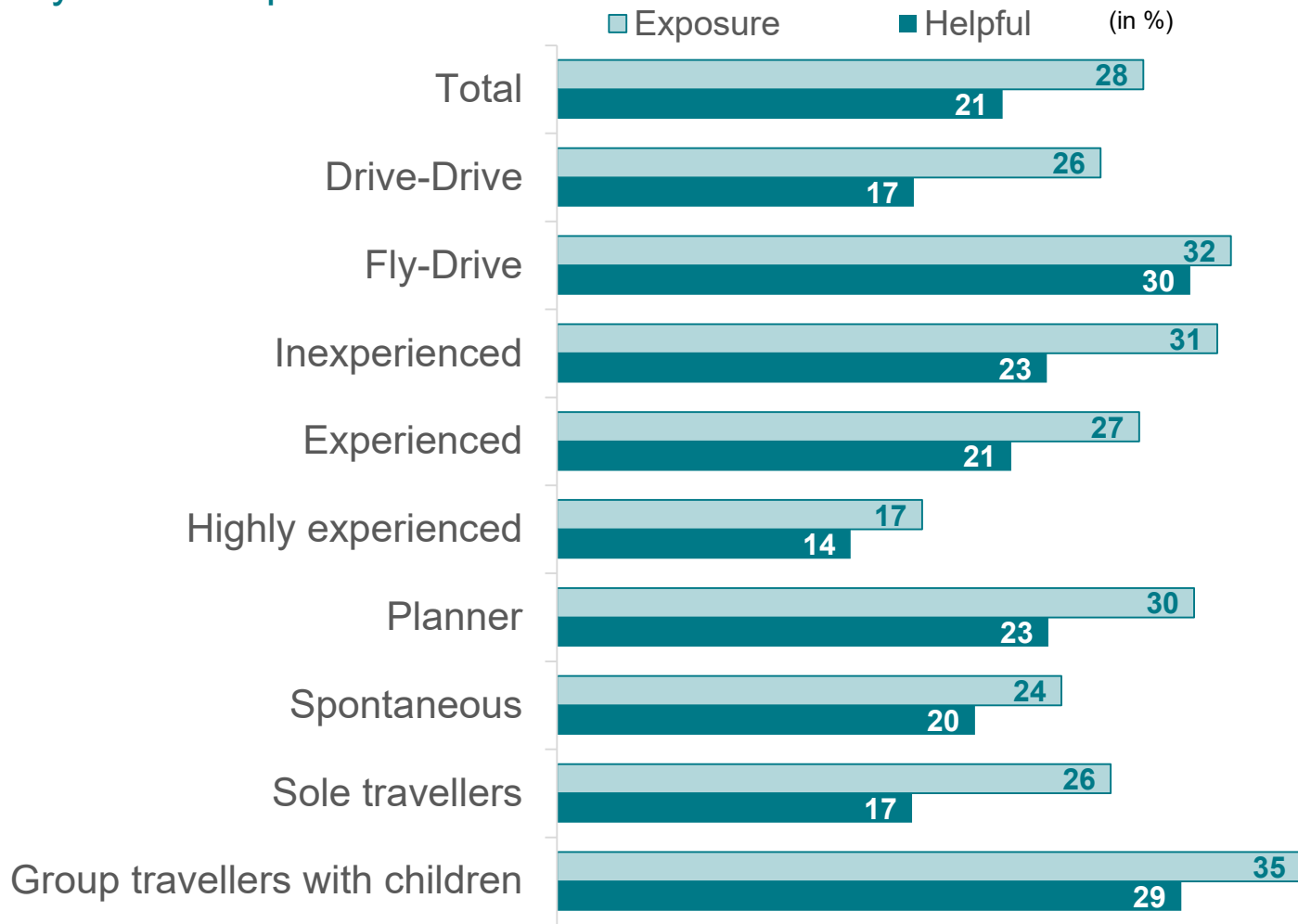


- Word-of-mouth on NT Drive holiday has created the most exposure to the current drive market, where 81% found out about NT this way.
- Next, websites that promote drive holidays were how 56% found out about NT drive holidays, which includes websites such as northernterritory.com, Tourism Top End, Discover Australia Holidays.
- Over 70% of those who find out about NT drive holidays via worth-of-mouth of the relevant promotional website have found these sources helpful in planning their trip. The helpfulness is reduced when it comes to social media, other online sources and traditional media.



Was the information in *northernterritory.com* website helpful?

by total sample



Northernterritory.com is highly useful to people who are unfamiliar with trips in the NT. They often land on this site via Google searching. But regular NT travellers don't use it, or the need for it gradually reduces as they gain familiarity. More importantly, the Government website is perceived to provide factual and unbiased information compared to social media groups.

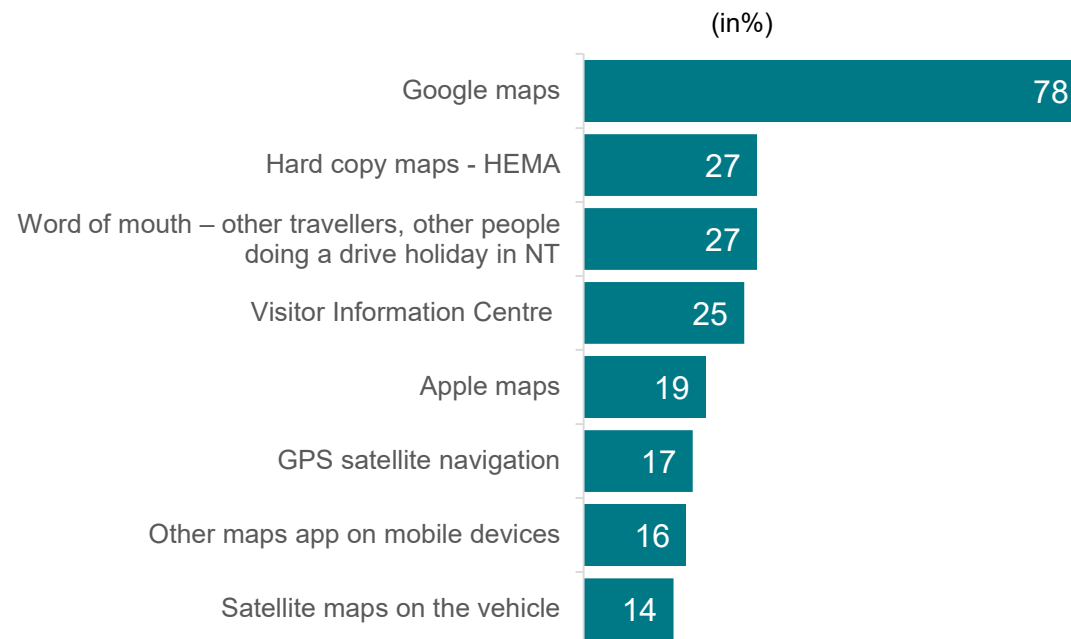
- 28% of the market found out about the NT holidays via *northernterritory.com*.
- Exposure was stronger among:
 - Tourists travelling with children (35%)
 - The Fly-Drive market (32%)
 - Inexperienced drive tourists (31%)
 - Planned (30%).
- The Fly-Drive market was more likely to find it a helpful tool to plan their road trip in the NT.
- For those highly experienced with drive holidays, only a small portion found out about NT via the website, but for those who did, up to 80% of them found it helpful in planning the NT trip.
- During one of the interviews, a male drive traveller said: *"I tend to hop onto it for some guidance when I'm in the unfamiliar road, but once I've got the lay of the land, I rarely need to use it."*



What information sources were accessed on the road?

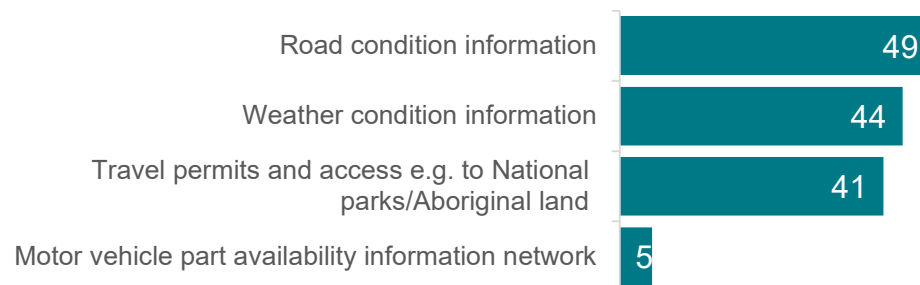
by total sample

Navigation **97%**



- 78% used Google maps. This was the dominant source of information that helped travellers during their holiday.
- Road (49%) and weather (44%) condition information, and travel permits, and access (41%) were the next most helpful information types.

Other road information **70%**



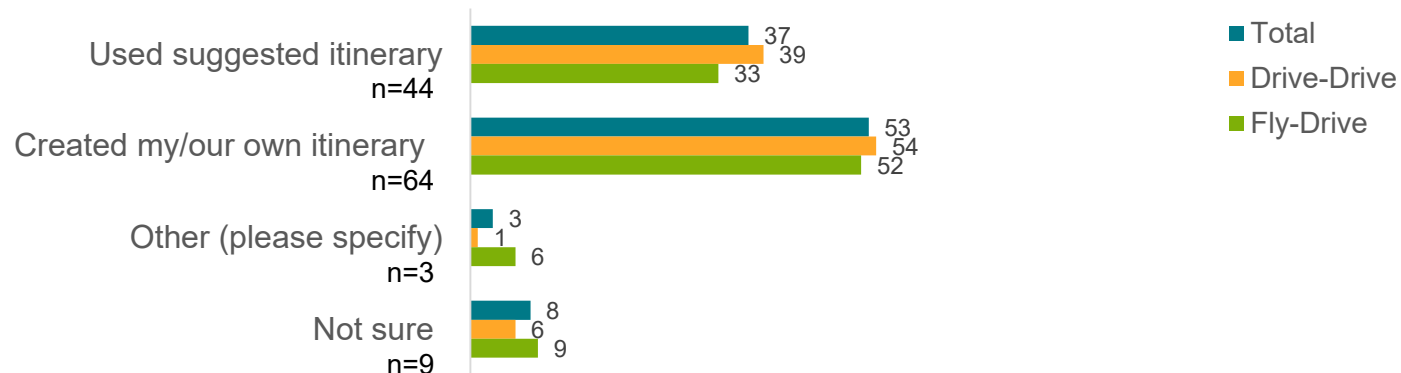
Facility information maps could be useful to people who were **unfamiliar with NT**. Travellers appreciated being able to look up how far to a toilet, rest bay, internet reception, food/water sources and other stop information. Some of the road signage was easy to miss. Having something travellers can refer to (even if loaded when in mobile reception but that they can use offline) can help build confidence for the traveller.



How well used were the suggested drive itineraries?

total sample by drive segment

Developing their itinerary (in %)



Ease of understanding the suggested itinerary (in %)



- 37% of drive travellers used a suggested itinerary, with 98% of those who used them finding the itineraries easy to understand.
- 53% reported developing their own itineraries.

Suggestions for improvement:

- Drive tourists with limited experience with road trips or road trips in the NT tended to refer to itineraries they found online. When people become more experienced, they require less road information and weather information online.
- The inexperienced often needed help planning the stops, knowing which fuel station operates and where they are likely to get internet coverage on the road.
- International travellers, especially those more senior and less experienced with using online resources, would benefit from basic tips that are more common knowledge for an Australian. For instance, getting Telstra and Optus sim cards maximises phone reception coverage.

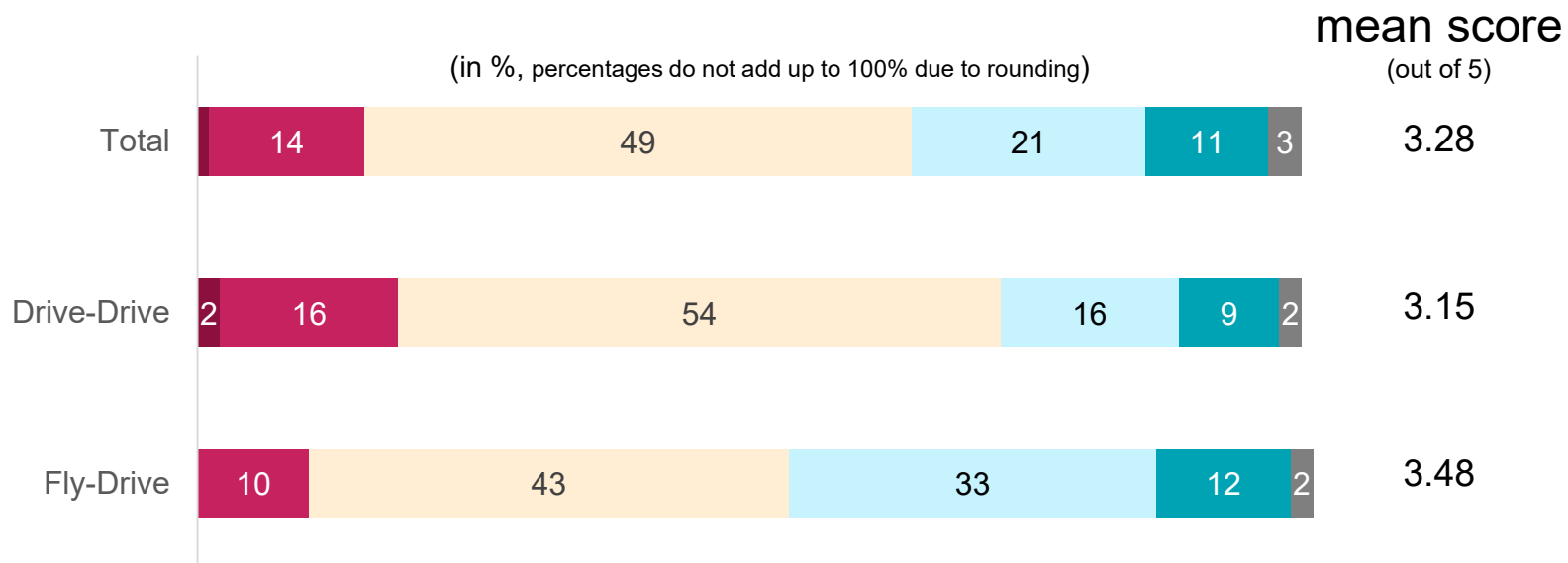
Base: Total sample used tourism websites n=120

Source: B10. Did you use any of the suggested itineraries like the ones below to inform your trip/journey or did you create your own itinerary from scratch? B11. Was it easy to understand and follow? B12. Do you have any suggestion for improvement on the suggested itineraries?



How does an NT drive holiday compare to other destinations?

by drive segment



• 32% of visitors who had taken a drive holiday outside the NT think the NT drive holiday was much better (11%) or somewhat better (21%) than the other drive experiences.

- Much worse than other state/territory
- Somewhat worse than other state/territory
- About the same as other state/territory
- Somewhat better than other state/territory
- Much better than other state/territory
- Not sure

what makes NT better

- the layback vibe
- a very special place with a diverse culture and nature sites
- Better road signage than that of NSW, VIC and SA.

what makes NT worse

- safety issues
- expensive
- road signages are not on par with that of WA. Signages in WA are designed well for tourists.
- car rental offers limited mileage. The long distance between locations in the NT makes it impossible to avoid the extra charge.

Base: Total sample took a drive holiday outside the NT n=150

Source: B15b. How would you compare your overall driving experience in the NT, including aspects such as experiences, products, services, and infrastructure, with other driving or fly/drive holidays you've had in different states or territories in Australia?



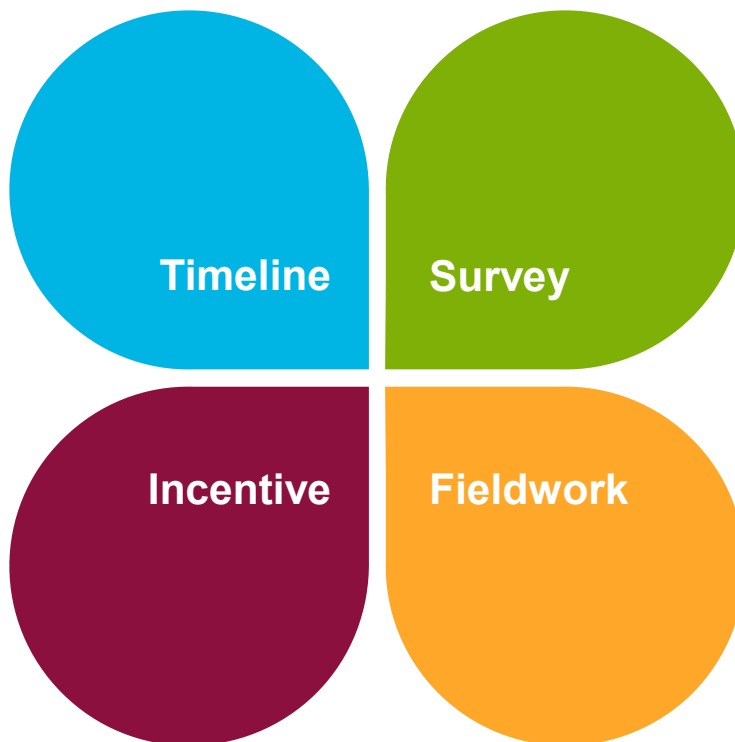
Thoughts on future Drive studies

Earlier fieldwork date for higher visitor flows in certain exit points

Start from August as tourists stream dry up in certain area earlier than the end of dry season (such as Borroloola).

Better incentives to encourage completes

Park pass, discount on fuel



Some questions to add for further analysis

How experienced are they with Drive holiday?

Have people done a Drive holiday in the NT before?

How often do they repeat this visit? Why?

Offline completes and partnership with stakeholders.

PDF completes on the road without reception. Click and send back the result with the "submit form" button.

Fieldwork collaboration with stakeholders listed in the Drive strategy: especially National Parks, and car rental depots.

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