



Greater Darwin Region Destination Management Plan 2022 Summary



Key Partners



Acknowledgement of country

Tourism NT respectfully acknowledges the Larrakia, Tiwi, Wulna, Limilngan, Uwnmil, Kungarrakan and Awaraï (Warai) people as the Traditional Owners of the Greater Darwin region, and pay respect to their leaders, past, present and future.

The Larrakia people are the Aboriginal Traditional Owners of lands and waters far beyond the municipal boundaries of Darwin. Tourism NT recognises the different Aboriginal cultures identified within this plan and respectfully acknowledges Larrakia as Traditional Owners of greater Darwin, with the boundaries of the region proposed within this plan encompassing neighbouring land areas and Aboriginal groups.

Front cover:
Tolmer Falls, Litchfield National Park
Image: Tourism NT/Jackson Groves

This page:
Sunset over East Point Reserve
Image: Tourism NT/PRLX - Felix Baker



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Fogg Dam Conservation Reserve
Image: Tourism NT/Daniel Tran



Destination management planning process

The Department of Industry, Tourism and Trade (DITT) has invested in destination management planning as part of a suite of actions following the development and release of the *NT's Tourism Industry Strategy 2030 (the Strategy)*.

Tourism can be an economic driver, contributing to the growth and development of a region through job creation, investment attraction, and infrastructure development. Equally important are the social benefits delivered from tourism, such as added vibrancy and the lifestyle benefits that attract visitors and residents alike.

Destination management ensures that tourism is cohesively integrated into the economic, social, cultural and ecological fabric of a community, by considering tourism growth holistically, through a regional lens and across a long-term timeframe.

The Strategy highlighted the need for Destination Management Plans to:

- identify investment-ready opportunities across regions, including new experiences and products to be delivered by the private sector, and core infrastructure to be delivered by the public sector; and
- identify priority segments for the regions.¹

The Greater Darwin Region Destination Management Plan (DMP) identifies key strengths and assets that support tourism outcomes across the region. The DMP considers visitation demand insights, existing planning and priorities for destinations in the region, and input from stakeholder engagement. The DMP identifies actions to activate the identified opportunities, address gaps which limit development outcomes for the tourism industry and prioritises product development options. The DMP seeks to enable the region's tourism industry to meet visitor demand, while encouraging the development of a sustainable tourism sector for the region.

Stakeholder feedback has informed the approach to develop the region's tourism industry, and supported analysis and design of the DMP. Over 100 contributions from stakeholders, through workshops, one-on one meetings, and survey responses, were collected as part of the consultation process.

An important role of the DMP is to identify and coordinate tourism industry and cross sectoral development initiatives across the region, to maximise the impact of this activity for tourism, as well as avoiding duplication and inefficiencies limiting destination outcomes.

The guiding approach utilised in the development of the Greater Darwin DMP includes:

- defining the destination and its access points
- understanding the market and offering
- engaging stakeholders to consider the vision for the future of the destination; and
- using a clear, structured and well communicated process to engage all stakeholders in the delivery of the vision.



Greater Darwin region overview

The Greater Darwin region (the region) covers over 30,000 square kilometres and includes the cities of Darwin and Palmerston, a number of regional centres, and the Tiwi Islands across the Timor Sea. The region extends south to Adelaide River, east to Mount Bundy on the Arnhem Highway, and follows the Mary River up to the Van Diemen Gulf. It is comprised of seven local government areas (LGA): City of Darwin, City of Palmerston, Litchfield, Coomalie, Tiwi Islands, unincorporated NT* and the Wagait Shire.

As a result of its northern proximity, Darwin is the closest Australian capital city to Asia, offering convenient air and sea travel routes for visitors. Darwin's international airport, cruise terminal and tourism experiences encourage travel via Asia and the Pacific.



Tourism contributed
\$691 million
to the Greater Darwin region's
economy in 2019-20²

In 2019-20, the Darwin region
directly employed
4,700 people
in the tourism industry, totalling
5.3%
of the working population**

Outside of the Darwin region,
the tourism industry provided
**55% direct
employment**
in 2019-20, compared to the
rest of the NT economy which
employs approximately
38% outside of Darwin.³

Figure 1 - Greater Darwin region map

Source: Community id, Deloitte

*Note: Unincorporated land in the region is made up of 2 distinct areas, being 1: East Arm - located just south-east of Darwin, bounded by the City of Darwin, Litchfield Council area, the City of Palmerston and Port Darwin; 2: located east of Darwin, bounded by Van Diemen Gulf, the West Arnhem Regional Council, the Victoria Daly Regional Council, the Coomalie Community Government Council and the Litchfield Council.

**Figures reflect both FTE and PTE total employment.

Destinations in the region

There are many locations offering tourism experiences in the Greater Darwin region, they are presented according to the LGA in which they are located. A summary of each of the key destinations in the region is outlined in Appendix C in the full plan.

Darwin

- Casuarina Coastal Reserve
- Charles Darwin National Park
- Darwin Botanic Gardens
- Darwin CBD
- Darwin Waterfront
- East Point
- Fannie Bay
- Holmes Jungle Nature Park
- Mindil Beach

Coomalie

- Adelaide River
- Batchelor

Litchfield

- Berry Springs
- Blackmore River Conservation Reserve
- Fogg Dam Conservation Reserve
- Gunn Point
- Harrison Dam Conservation Area
- Howard Springs Nature Park
- Humpty Doo
- Noonamah
- Tree Point Conservation Area

Palmerston

- City of Palmerston

Tiwi Islands

- Bathurst Islands
- Melville Islands

Unincorporated NT

- Bynoe
- Djukbinj National Park
- Dundee Beach
- Litchfield National Park
- Mary River National Park

Wagait Shire

- Wagait Beach
- Mandorah

Greater Darwin is a developed tourism region supporting tourism outcomes across the Northern Territory (NT), and northern Australia. The region benefits from established infrastructure and services, enabled through its capital, the most northern capital city in Australia – Darwin.

Darwin is the most common entry and exit access point for those visiting the NT. The region offers a diversity of well-established tourism capabilities – enabling visitors to plan travel to Greater Darwin region as a destination in its own right or to leverage the region as a stopover in broader exploration of the NT.

In addition to an active central business district that offers diverse hospitality, arts and cultural institutions, and leisure experiences, the region contains the acclaimed Litchfield National Park, a vast harbour, expansive rivers, and spacious tropical beachfronts. The region's accessible social, cultural and environmental experiences provide visitors with a diverse array

of quality opportunities to engage with the local history, culture, wildlife and adventure available in the region.

The Greater Darwin region incorporates the lands of the Larrakia, Tiwi, Wulna, Limilngan, Uwnmil, Kungarrakan and Awarai (Warai) people, providing opportunities for visitors to engage with local Aboriginal culture and communities, and the potential for further development of cultural tourism.

The region hosts an international airport, establishing the destination as an important bookend to journeys in, and out, of Australia and the Territory. The current breadth of offerings in the region attract a diverse cohort of visitors, such as bucket-list travellers on The Ghan rail journey, fishing enthusiasts and people of all ages attracted by the region's festivals and events.



Visitation snapshot

756,000

Visitors in 2019-20 to the region⁵

86%

of which were domestic visitors⁶

86%

of interstate visitors travelled by air⁷

42%

of international visitors arrived via air travel⁸

82%

of intra-Territory visitors used a private vehicle to travel to and around the region

This confirms the importance of road infrastructure and services across the NT to enable access for intra-Territory visitors.

In 2019, approximately

450,000 travellers

to other NT tourism regions originated their trip in the Greater Darwin region⁹

43%

international visitors to the Greater Darwin region go on to visit other NT tourism regions¹⁰

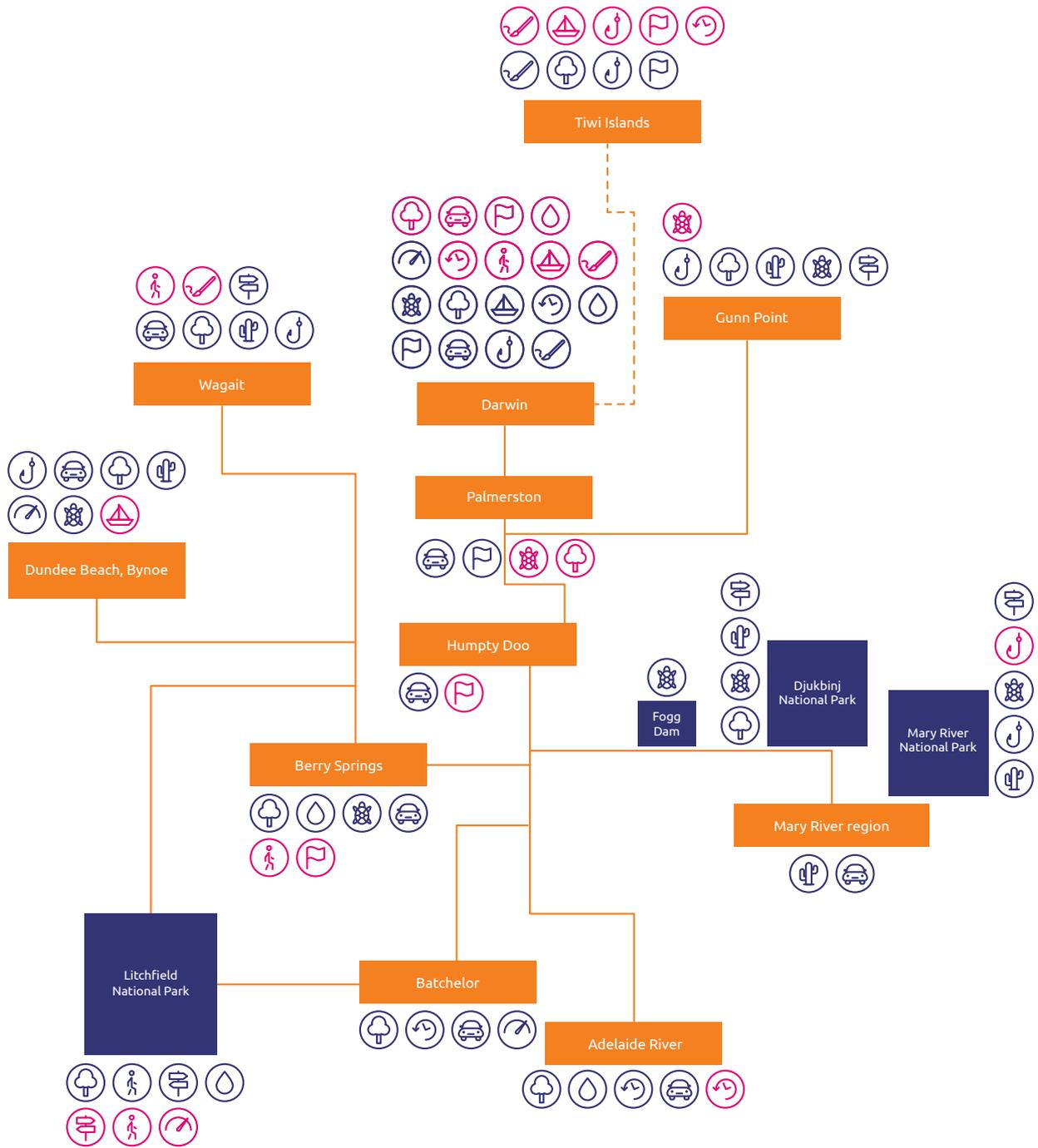
This establishes the important role of product packaging and collaboration across the Territory's regions in supporting tourism outcomes.

Intra-Territory visitors average

2.5 nights per visit¹¹

Interstate and international visitors stay on average

5.8 and 11.9 nights respectively.¹²



Legend

- | | | | |
|----------------------|------------------------------|--------------------------|---------------------|
| Fishing | Adventure tourism | Swimming and hot springs | Festivals/events |
| Natural attractions | Hiking & cycling | Wellness | Arts and culture |
| History and heritage | Cruise/tours | Wildlife | Existing product |
| 4 wheel driving | Services (fuel, accom, etc.) | Outback experience* | Product opportunity |

Figure 2 - Snapshot of tourism destinations and experiences in the Greater Darwin region

Source: Deloitte

*Note: Outback experience describes unique outdoor environments and experiences of the region.



Value of tourism

The region's estimated resident population in 2020 totalled 151,251 residents, representing 61% of the NT population.¹³ However, like much of the Territory, population attraction and retention is a key challenge for the region and a barrier to growing economic capacity. Between 2017 and 2020, the population decreased by 1,842 residents, or 1.2% for the period.¹⁴

There are 10,975 registered businesses in the region, representing about 74% of all NT registered businesses. The value of all goods and services in the region is \$18.64 billion, comprising 71% of the Territory's total economic value. The leading industries in the region in 2019/20 by value included:

- Mining (\$5.2 billion)
- Public administration and safety (\$2.2 billion)
- Health Care and Social Assistance (\$1.2 billion)
- Construction (\$1.1 billion)¹⁵

Tourism is an important industry for the Darwin region, contributing \$691 million to Gross Regional Product (GRP) and employing 4,700 people in 2019-20*. This equates to 3.7% of the region's GRP, and 5.3% of the region's employment.¹⁶

Notably, approximately 55% of the direct employment by the tourism industry in 2019-20 was outside of the Darwin region, compared to the rest of the NT economy which only employs approximately 38% outside of Darwin.¹⁷

In 2019-20, the hospitality sector employed an estimated 1,411 jobs* in the Darwin region across the following sectors:

- accommodation
- cafés, restaurants and takeaway food services
- clubs, pubs, taverns and bars
- casinos and other gambling services.

Tourism also offers unique economic benefits for the Territory's Aboriginal population, through employment, business development, Indigenous land holdings and cultural tourism opportunities.

In 2019-20, tourism's contribution to the Darwin region's GRP dropped 26% from the previous year to \$691 million, and employment dropped 18% to 4,700 (noting that these figures reflect the impact of COVID-19).¹⁸

Visitor market profile

The Greater Darwin region welcomed 756,000 visitors in 2019-20.19 These visitors spent a total of \$818 million during their trips to the region.^{**20}

Tourism contributed \$691 million to Darwin's GRP in 2019-20, a 26% decrease from the previous year. The key categories for visitor spending were long distance passenger transportation, takeaway and restaurant meals, accommodation, fuel (petrol, diesel) and shopping.^{***21}

Domestic tourists are the most prominent visitors to the region. In 2019-20, 648,000 visitors, or 86% of total, were domestic travellers, consisting of 212,000 intra-Territory visitors and 435,000 interstate visitors. The region also welcomed 108,000 international visitors. The top international sources for visitors were the United Kingdom, the United States of America, and Germany.²²

Figure 3 on the next page summarises key characteristics of the three visitor markets.

Visitors, except for Territorians, primarily use aircraft to get to the region and travel around. Of the visitor markets to the Greater Darwin region, the following proportion arrive or travel around by air.^{****23}

- 15% of intra-Territory visitors
- 86% of interstate visitors
- 42% of international visitors

The vast majority (82%) of intra-Territory visitors used a private vehicle to travel to and around the region, emphasising the importance of road infrastructure and services across the NT to enable access for intra-Territory visitors.

Of visitors to the Greater Darwin region, the most common reasons for visiting are holiday and business. Two thirds of international visitors to Darwin are there on holiday, higher than the national average of 46% in 2019.²⁴

*Figures reflect both FTE and PTE total employment.

** Expenditure is for Darwin only, excluding Litchfield National Park and Batchelor.

*** Note: These figures are calculated as the sum of visitation to the individual regions (Darwin SA4, Outer Darwin Special Region, Tiwi Islands LGA and Wagait LGA)

*** Note: 2018-2019 results have been smoothed by taking three year average while 2019-20 results are unsmoothed.

**** Note: Transportation refers to stopover transportation and includes transportation used to arrive and used within the region. Other transport includes long distance transport, local transport, other land transport, water transport and other transport and not stated/asked.



Boat in waterway, Darwin surrounds
Image: Tourism NT/Summersite

The vast majority (79%) of intra-Territory visitors used a private vehicle to travel to and around the region, emphasising the importance of road infrastructure and services across the NT to enable access for intra-Territory visitors.

One-quarter of domestic visitors are part of the leisure drive market, with NT residents comprising around two thirds (67%) of this group.²⁶ Domestic leisure drive market visitors are typically short stay visitors, with 78% staying three nights or less. Among international travellers who visited the region, 42% arrived in Australia through Darwin, with Sydney the second largest entry and exit point.

One in three international visitors to the region go on to visit other NT tourism regions,²⁷ establishing the important role of product packaging and collaboration across the Territory's regions in supporting tourism outcomes.

Intra-Territory visitors average 2.5 nights per visit, while interstate and international visitors stay, on average, 5.8 and 11.9 nights respectively.²⁸

Of visitors to the Greater Darwin region, the most common reasons for visiting are holiday and business. Two thirds of international visitors to Darwin are there on holiday, higher than the national average of 46% in 2019.²⁹



Figure 3 - Visitor market profile

Source: Tourism Research Australia, National and International Visitor Survey, 2019-20*



BASSINTHEGRASS
Image: Tourism NT/Helen Orr



Trends in regional tourism

The Greater Darwin region is both highly accessible to visitors and offers a range of high-quality and valued tourism experiences that visitors are seeking, including unique, authentic, cultural, and nature-based tourism experiences.

Yet, a number of barriers to travel may be impinging the ability of the region to compete for visitors, with other capital cities in Australia. Such barriers include limited food and shopping experiences, distance and travel time and cost constraints, and a lack of knowledge of the region.

In addition to addressing barriers to visitation, opportunities exist to grow Aboriginal tourism, and expand on already successful attributes of the region, such as nature-based and eco-tourism, and festivals and events, to capitalise on current tourism trends.

The last two years have also seen a shift in traveller behaviour and preferences as a result of the COVID-19 pandemic, in some cases accelerating trends that were emerging pre-COVID. These trends include:

- preference for regional destinations (non-major cities)
- increased popularity of road trips, self-paced travel, and longer trips
- visitors increasing focus on nature-based experiences, and looking for authentic and immersive offerings
- increasing use of technology as part of the service offering
- airlines, alongside other travel providers, rethinking routes and partnerships, resulting in new potential markets and trip configurations.

Many of these trends present opportunities for the region (and the Territory), positioning the tourism sector strongly in the years ahead.

Several common experiences and attractions span multiple tourism regions in the Territory, as shown in Table 1. These common and connected experiences create unique journeys, supporting visitor dispersal between regions in the NT.

As the primary connections between the Territory's tourism regions are accessible by road, these experiences are generally best packaged and promoted as drive journeys. However, a recent study of drive-visitors in the NT found that overall, the drive-visitor experience had declined due to limited or poor infrastructure and a lack of curation and promotion of available experiences. The *Northern Territory Drive Tourism Strategy 2021-2030* notes opportunities to enhance the connection between Greater Darwin and other NT tourism regions, by:

- enhancing food and drink offerings, to include seasonal and local produce and light meals
- improving the detail and presentation of heritage and history sites throughout the Territory
- recognising and presenting information relating to Aboriginal owned lands
- providing curated adventure tourism self-drive experiences.²⁵

Table 1 - Common experiences and attractions in NT regions

Attraction	Greater Darwin	East Arnhem Land	Kakadu	Big Rivers	Barkly	Alice and MacDonnell	Lasseter
World War II history	●			●	●	●	
Pioneering history	●		●	●	●	●	●
Aboriginal cultural tourism and the NT arts trail	●	●	●	●	●	●	●
The Ghan train journey	●			●		●	
Drive journeys	●	●	●	●	●	●	●
Bird watching	●	●	●	●	●	●	●
Parks and natural attractions	●	●	●	●	●	●	●
Sports and adventure activities	●			●		●	●
Hiking	●		●	●		●	●

Legend

Nature-based offerings ● Aboriginal cultural offerings ● Transport journey offerings ● History and heritage offerings ●

Source: Deloitte



Destination management planning for the Greater Darwin region

A comprehensive study of the current and potential state of the tourism industry for the Greater Darwin region was undertaken. This study has focused on understanding the current market, the available and potential tourism experiences in the region, opportunities for sustainable growth in the industry and industry stakeholder needs and priorities.

This analysis has highlighted that there are many strengths in the Greater Darwin region’s tourism offering, and given this strong base, a real potential for further development of the destination. By leveraging the region’s unique attractions and building on the strengths of the current capacity of the industry – a substantive advancement in the maturity and competitiveness of the region can be achieved.

The region has a broad range of tourism offerings, with visitor satisfaction suggesting many offerings are delivering high quality experiences. In addition, there are several potential tourism offerings that could be developed over the short to medium term.

The current and prospective tourism offerings in the region are well aligned to the drivers of visitation of both the domestic and international market with nature-based and authentic

cultural experiences highly sought by potential visitors. The established tourism facility and infrastructure base across the region provides the capacity needed to sustainably scale-up future industry growth, develop industry capability and enhance tourism experiences that are attractive to domestic and international visitors.

There are opportunities to build governance capabilities that support a strong and sustainable tourism industry. Such opportunities include greater cross-sector collaboration to better enable tourism outcomes, enhance support to facilitate investment initiatives, improve coordination to better leverage and maximise the existing capability in the industry and strategic oversight of enabling and intersecting industries to support tourism sector development.

The Greater Darwin region is a prominent destination for domestic and international visitors, playing an important role in supporting tourism outcomes across the NT, northern Australia and Australia.

Guiding principles

The Greater Darwin Region Destination Management Plan is guided by leading principles for destination management that have been tailored to the region, following stakeholder engagement and consultation. These are:



The Greater Darwin region will be known for and distinguished by a distinctive identity and year-round product offerings



The approach to destination development will deliver benefits for both visitors and residents of the region



Tourism experiences in the region will be tailored to visitor expectations



Local values and attributes will showcase the region



Collaboration will drive benefits for the region

Destination awareness

Trade partner insights indicate positive levels of destination awareness exist for the Greater Darwin region given its gateway status for access to the Territory by both international and domestic visitors. The region is also a key destination for working holiday makers and is successfully associated with nature experiences including Litchfield National Park and Kakadu National Park (managed by Parks Australia), as well as unique journeys, like The Ghan. Access to high-quality nature products is a comparative advantage for the region, and when nature species can be distinguished as being rare and local to Greater Darwin, positive visitation results are achieved. Conversely, perceptions of poor value for money challenge the positive associations and tourism outcomes for the region.

Feedback from stakeholders indicated that destination awareness is largely centred on the city of Darwin, with awareness of tourism experiences more limited as remoteness from the city increases. Notably this view does not apply to Litchfield National Park which experiences high levels of destination awareness.

Stakeholder consultation identified opportunities and a desire for destination marketing to more comprehensively reflect the breadth of tourism experiences across the region. This was particularly evident in discussions about marketing of Aboriginal cultural tourism experiences. Some stakeholders were keen to leverage the Larrakia seasons as a framework for the Darwin region,²⁶ suggesting a distinct articulation as to provide the opportunity to develop and showcase tourism experiences across the year, ultimately resulting in increased visitation and economic benefit to the region. Differentiating the region's distinct seasons could better set and manage expectations and satisfaction of visitors..

Overall, stakeholders identified many strengths in the local tourism industry, and articulated unique value in the region's tourism offering. Stakeholders are seeking to maximise the genuine opportunities for tourism development and growth, in strategic and coordinated ways.

Approach to destination development

The Greater Darwin region benefits from a well-established, sizeable and mature tourism industry. The capacity of the industry means there are opportunities to expand on this established base, by enhancing the quality of existing offerings, attracting investment for product development, and supporting the establishment of new tourism experiences through partnerships, mentoring and structured investment. Several opportunities exist to further develop the tourism industry in the Greater Darwin region over the next ten years.

To support a strengths-based approach to development, the DMP works to leverage the region's unique comparative advantages, and strengths in the visitor market, while concurrently developing systems and investing in structures that enable the tourism industry to develop sustainably. This approach utilises the tools described in *Figure 4* to support the sector's growth.

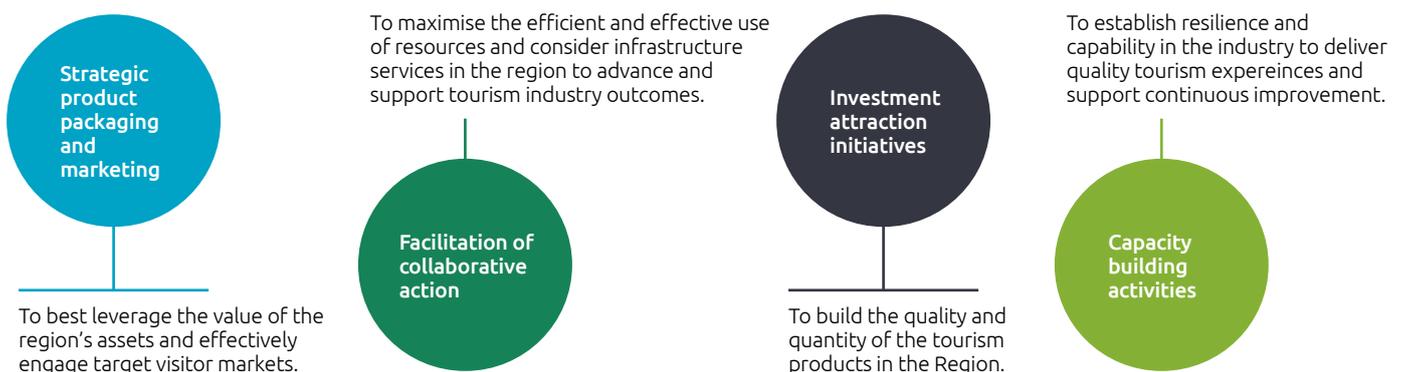


Figure 4 - Approach to destination development

Source: Deloitte

Comparative advantages



Geographic positioning

The Greater Darwin region's far north geography makes for a convenient and attractive destination for international visitors travelling between Australia and Asia. The region has the opportunity to enhance connections to Europe, and acts as a gateway for domestic visitors to disperse throughout the NT.



Welcoming and supportive

Territorians have a reputation for being relaxed and welcoming, offering warm hospitality. The lifestyle, outback characters, diverse and harmonious community is an attractive feature for visitors.



Developed market and tourism capability

The tourism sector in Darwin is mature, with established visitor markets, and tourism experience and amenities. This capacity establishes a base that can support ongoing scaling-up, diversity and growth of the tourism industry across the region.



Tropical environment and relaxed lifestyle

The region has a tropical and warm environment which is conducive to a relaxed and outdoor lifestyle. The tropical environment and lifestyle are particularly inviting for nature-lovers and those seeking to escape from colder climates.



High quality and accessible nature experiences

Visitors to the region enjoy easy access to unique and diverse nature experiences, which is coupled with easy access to impressive and local wildlife.



Diverse multicultural experiences

The Greater Darwin region is famously multicultural, and visitors and residents benefit from the cultural diversity that is integrated into the community. Year-round experiences celebrate and provide opportunities to engage with local cultures.



Aboriginal cultures

The region comprises the lands of the Larrakia, Tiwi, Wulna, Limilngan, Uwnmil, Kungarrakan and Awarai (Warai) people, providing unique connections and opportunities for visitors to engage with Aboriginal people and their stories. The region also acts as a gateway to numerous remote Aboriginal communities and art centres across the Territory's Top End.



Festivals and events

The region has a range of significant events that drive visitation. Attributes of the region – like the tropical environment, welcoming community and cultural diversity culminate in distinct event and festival experiences. The region's event portfolio can be further leveraged to attract different visitors markets, all year round and encourage dispersal across the NT.

Industry gaps and opportunities

While the region benefits from a number of comparative advantages, there are opportunities to strengthen the tourism industry, and further develop the quantity and quality of available tourism products.

An analysis of the opportunities and gaps identified in the region's tourism industry, and approaches to maximising these opportunities or minimising gaps, is summarised in *Table 2*. For each opportunity or gap, suggested approaches and actions are identified in the table are described in detail in the action plan which follows.

Table 2 - Current opportunities and gaps in the Greater Darwin region tourism industry

	Description	Approach	Action
OPPORTUNITIES	Development of year-round destination – Expansion of the quantity and quality of products and experiences across the entire year, moving to a more deliberate year-round tourism industry. Enhanced access to water activities is essential in executing this strategy. Achievement of greater visitor continuity would improve outcomes for operators, bringing greater commercial returns, and from an industry perspective would encourage private sector investment, support workforce continuity and enhance engagement with the travel trade.	<ul style="list-style-type: none"> Investment attraction initiatives Capacity building activities Strategic product packaging and marketing Facilitation of collaborative action 	5, 10, 11, 21
	New product development – Limited year-round tourism product offerings negatively impact the length of stay for visitors in the region. The region's unique cultural heritage is an advantage and an opportunity to distinguish the Greater Darwin region that should be leveraged to improve the tourism experience. This is particularly true of Aboriginal cultures in the region. <i>A range of product development opportunities have been identified for the region, as listed in Appendix A.</i>	<ul style="list-style-type: none"> Investment attraction initiatives Capacity building activities 	1, 2, 3, 4, 6, 22
	Maximise festival and events – Festivals and events can drive attraction of a diverse cohort of visitor segments, and support dispersal across the region and to neighbouring NT tourism regions. Currently events in the Top End are concentrated in the peak visitor season, and there is an opportunity to enhance product packaging leveraging the region's events. There is a need to support the sustainable development of this sector by fostering a pipeline of events and festivals. There is an opportunity for better coordination between industry and Government to time and target events, enhance visitor attraction, market diversification and dispersal.	<ul style="list-style-type: none"> Strategic product packaging and marketing Facilitation of collaborative action 	8, 9
	Enhance collaboration – Enhanced collaboration between government and both established and prospective tourism operators could support the development of new tourism experiences, and better coordinate industry initiatives to maximise tourism outcomes. Greater engagement with industry stakeholders and integration of the tourism and arts and culture sectors could offer complementary benefits.	<ul style="list-style-type: none"> Facilitation of collaborative action 	1, 3, 4, 8, 9, 10, 11, 16, 17, 19, 20, 21, 22
	Expanded promotion – Provide more nuanced marketing and promotional materials for the region that showcase the breadth and depth of the region's offering across all seasons, and accurately reflect available Aboriginal cultural experiences in the region. This is an important lever to support Aboriginal tourism product development in its infancy, by working closely with Aboriginal leaders and communities to explore opportunities for representation and interpretation of Aboriginal stories, cultures and lands. Development of destination branding for the region could support this outcome and enhance opportunities for product packaging.	<ul style="list-style-type: none"> Strategic product packaging and marketing 	7, 12, 13, 14
	Enhanced skillset – Some tourism operators have limited experience and knowledge of how to engage in digital marketing, and visitor data analysis, reducing responsiveness of the sector to the dynamic market. Skills development could enhance the competitiveness of the region.	<ul style="list-style-type: none"> Capacity building activities 	20, 22
	Streamlined processes – Opportunities exist to continue to refine regulation and processes, to limit red and beige tape which deters business development.	<ul style="list-style-type: none"> Facilitation of collaborative action 	15
GAPS	Public transport – There are limited public transport options in the region, with options particularly lacking between Darwin and nearby regional areas such as Wagait Beach and Darwin's rural area. Stakeholders have identified the need for an integrated future network, including an expanded ferry service ²⁷ . Concept testing aligning with broader networks and existing public systems could support the development of sustainable public transport options.	<ul style="list-style-type: none"> Facilitation of collaborative action 	16
	Essential services – Smaller towns (like Adelaide River, Batchelor and Mandorah) across the region struggle to manage the peaks in demand generated by visitors in the high season, creating challenges for maintaining public spaces at a high standard and meeting the needs and expectations of visitors.	<ul style="list-style-type: none"> Capacity building activities Facilitation of collaborative action 	17
	Built infrastructure – Gaps exist across physical infrastructure networks, limiting accessibility in the region, including unsealed roads, roads subject to flooding, a lack of electronic vehicle charging sites, poor telecommunications connectivity in areas such as Litchfield and Coomalie, improved signage and a lack of universal accessibility options at natural attractions.	<ul style="list-style-type: none"> Facilitation of collaborative action Investment attraction initiatives 	1
	Funding – Limits to funding and government support challenge the development of the sector, this is of particular importance to the region's National Parks. Further investment, or co-investment, in tourism related infrastructure could incentivise private sector investment and focus investment in priority areas.	<ul style="list-style-type: none"> Capacity building activities Facilitation of collaborative action 	23
	Workforce – Staff shortages are a perennial issue in the NT and directly affect the tourism industry, by limiting capacity for service delivery and sector growth. Solutions should be explored to build a workforce with increased reliability and train and upskill existing workers.	<ul style="list-style-type: none"> Capacity building activities Facilitation of collaborative action 	18



Action Plan

To sustainably grow the region’s tourism industry, a focus on **investment attraction; strategic product packaging and marketing; collaborative action;** and **capacity building** is recommended.

A plan for the activation of these four development levers, in partnership with stakeholders in the region, is outlined below.

Investment attraction initiatives

The Greater Darwin region has a mature tourism industry. There is an opportunity to build on established capacity to further expand the quality and quantity of tourism product. If successful, investment attraction efforts could further develop and diversify the range of tourism products available in the region. There are potential tourism product opportunities that are yet to be developed, and existing products which could be enhanced to drive visitation to the region. To attract visitors across the year, there is a need to develop a range of tourism offerings that support visitation in the shoulder and low seasons. Development of a longer tourism season will facilitate sustainable industry growth, by enhancing operator efficiencies, attracting increased visitor expenditure, and enhancing industry capability and outputs.

Why is this a priority?

- There are opportunities for enhancing visitor experience and satisfaction, with the Tourism NT destination satisfaction survey achieving a mean score of 5.8 for overall satisfaction (on a 7-point scale) recorded for the region.*
- NT destination satisfaction survey data identified feedback that opportunities exist to improve destination awareness, value for money and food options in the region.
- Comparative advantages, and opportunities to be developed in the region are closely aligned to visitor demands (unique, nature-based, cultural tourism opportunities).
- The region has a mature tourism industry, creating an opportunity to leverage existing capacity to expand the range of visitor attractions and experiences across the year.

Actions	Lead	Partner	Outcomes
1. Building on opportunities identified in this DMP, develop a portfolio of product opportunities. Engagement is required across the public and private sector to establish a pipeline and investment prospectus, including potential projects for the national tourism investment pipeline.	TNT	Investment Territory, TTE, DCMC, LGAs	<ul style="list-style-type: none"> • Establishment of a structured approach to tourism investment attraction and coordination in the region • Increased tourism investment in the region • Increased tourism products in the region
2. Establish a framework for the articulation and development of tourism investment initiatives in the region.	TNT	Investment Territory, DCMC	<ul style="list-style-type: none"> • Establishment of a structured system to test, build and action tourism investment concepts in the region • Increased tourism investment in the region • Increased tourism products in the region
3. Work alongside stakeholders in the region to develop product opportunities identified in the destination management plan.	PIT	Investment Territory, DCMC	<ul style="list-style-type: none"> • Increased quantity and quality of tourism experiences in the region
4. Work with prospective investors and operators in the region to facilitate tourism infrastructure investment commitments – maximising value through partnerships and collective investment.	TNT	Investment Territory, TTE, DCMC, LGAs	<ul style="list-style-type: none"> • Increased quantity and quality of tourism experiences in the Region • Coordinated investment in tourism experience in the region
5. Prioritise access to water-based experiences in decision making in project planning and operational management in the region, to support increased visitation and encourage investment that will drive visitation across all seasons.	PIT	DIPL, DCMC, LGAs, DEPWS as partners	<ul style="list-style-type: none"> • Enhance the attractiveness of the region across the year • Increase visitation, consumption and experiences in the region • Increase the number of products/ experiences that drive year-round visitation
6. Tourism NT, LGAs and NT Government departments to prioritise opportunities identified and/or aligned with the DMP, when providing comment, or allocating funding to investment initiatives and grant rounds. This will include prioritising support for: <ol style="list-style-type: none"> universal accessibility Aboriginal cultural tourism product development tourism product development. 	TNT	LGAs, PIT	<ul style="list-style-type: none"> • Increased quantity and quality of tourism experiences in the region • Increase visitation, consumption and experiences in the region • Strategic alignment and coordination of approaches to tourism industry development in the region

* Tourism NT commissioned a survey to measure satisfaction of visitors to the NT, completed in 2019 the survey collected 701 responses from domestic and international visitors, with the sample covering visitors across all NT tourism regions, enabling exploration of visitor experience for both the NT and its tourism regions.

Strategic product packaging and marketing

The comparative advantages of the region align closely with some of the top reasons to visit Australia - including nature-based experiences, cultural and unique tourism opportunities. Strategic product packaging and marketing provides an opportunity to leverage these advantages, in addition to addressing barriers to regional dispersal among international and domestic visitor markets.

Barriers limiting the dispersal of domestic and international visitors to regional destinations in Australia include financial constraints, preferences for destinations which feature well known dining, shopping, and a greater range of experiences, as well as perceptions of limited value for money. In addition, the more limited pool of experiences available in shoulder and low seasons reduces the attractiveness of regional destinations among visitors targeting this period of travel.

Marketing activities and campaigns contribute to building the value of tourism offerings in the Greater Darwin region, while also contributing to positive visitor satisfaction through visitor expectation management. Marketing and product packaging will be an important tool for driving visitation across the year, given market awareness of experiences in shoulder and low seasons is limited.

Why is this a priority?

- As festivals and events encourage dispersal of visitors to regional destinations in Australia, the Greater Darwin region has an opportunity to plan and package its numerous unique festivals and events to encourage visitation including during peak, shoulder and low visitor seasons.
- As further tourism product is established in the region, there will be opportunities to communicate the nuance of visitor experiences and the unique attributes of the Greater Darwin region. Expanded promotion of the breadth and depth of the region's cultural offering across its distinct seasons, as well as greater engagement with Aboriginal people to promote available Aboriginal cultural experiences could help to drive visitation and enhance visitor satisfaction.
- Strategic product packaging offers a mechanism to attract visitors to the region during low visitation periods, to support the industry goal of building the tourism industry to deliver quality experiences all-year round.
- Issues of value for money for visitors to the region have been identified in the NT destination satisfaction survey and ReviewPro data, strategic product packaging may help to alleviate this perception.

Actions	Lead	Partner	Outcomes
7. TNT to develop a suite of targeted marketing initiatives that deliver a nuanced perspective of tourism experiences for the region – specifically, the diverse offerings across the seasons, and stories of Aboriginal cultures to enhance Aboriginal cultural tourism product awareness and promotion.	TNT	ATC, Aboriginal tourism operators, Aboriginal organisations	<ul style="list-style-type: none"> • Increased awareness of the region's identity • Enhanced visitor satisfaction outcomes • Increased visitation to the region, across shoulder and low seasons
8. Support festivals and events attraction and promotion in the region by: <ol style="list-style-type: none"> a. promoting packaging options for events b. developing events to extend visitor stays 	NTMEC	TTE, TNT, LGAs	<ul style="list-style-type: none"> • Enhanced articulation of events and festivals in the region • Increase visitation, and expenditure in the region • Increase the number of products/ experiences that drive year-round visitation • Coordinated investment in tourism experience in the region
9. Implement strategic priorities identified in the Northern Territory Major Events Company (NTMEC) Playbook 2021-2032 to create a balanced portfolio of events to attract visitors year-round.	NTMEC	TTE, TNT	<ul style="list-style-type: none"> • Enhanced articulation of events and festivals in the region • Increase visitation, and expenditure in the region • Increase the number of products/ experiences that drive year-round visitation • Coordinated investment in tourism experience in the region
10. Work collaboratively with tourism operators to identify opportunities for product packaging that will develop a portfolio of products and experiences that connect all seasons to grow visitation across the year.	TNT	Tourism operators, TTE	<ul style="list-style-type: none"> • Increase the number of products/ experiences that drive year-round visitation • Increased visitation in the region across the year (as accessibility is achieved) • Improved visitor satisfaction outcomes • Enhanced regional identity awareness amongst visitor markets
11. DEPWS to work with tourism operators to manage regulatory functions to operate across the year.	DEPWS	Investment Territory, TTE, DCMC, TNT	<ul style="list-style-type: none"> • Increased quantity and quality of tourism experiences in the region • Coordinated investment in tourism experience in the region
12. Promotion of the region to centre on unique attractions and experiences available across all seasons, in particular relating to: <ul style="list-style-type: none"> • nature and wildlife • relaxed tropical lifestyle • warmth and hospitality • unique and diverse multicultural experiences; and • available Aboriginal cultural tourism experiences. 	TNT	Tourism operators, TTE, LGAs	<ul style="list-style-type: none"> • Enhanced regional identity awareness among visitor markets • Increase visitation, consumption and experiences in the region • Enhanced skill and capacity of tourism operators to market and promote tourism experiences

Actions	Lead	Partner	Outcomes
13. In collaboration with industry, leverage the broader NT brand and destination marketing activities to develop and define a regional identity and build awareness of the region.	TNT	PIT, TTE	<ul style="list-style-type: none"> • Definition and articulation of a regional identity • Increased awareness of the region's identity
14. In partnership with Arts and Culture, reevaluate the NT Arts Trail with the aim to identify approaches to deliver the initiative.	DTFHC	ATC, TNT	<ul style="list-style-type: none"> • Increase visitation and expenditure in the region • Enhanced regional identity awareness among visitor markets

Facilitation of collaborative action

As there are a wide range of stakeholders contributing to outcomes in the tourism industry in the Greater Darwin region, systems and processes which enable effective coordination and collaboration across stakeholder cohorts will enhance the likelihood of efficient use of resources, through resource sharing, information sharing, collective decision making, and reduction in duplication and waste.

A broad range of services and infrastructure enable and contribute to the quality of tourism offerings in the Greater Darwin region. For example, high quality road infrastructure, public transport services, and workforce skilling programs all influence and impact the local tourism sector. The planning, review and refinement of these services and systems through a 'tourism' lens is important for identifying opportunities for alignment and value-adding.

A systematic approach enabled by collaboration across the tourism sector will be very relevant for the region over the next 10 years, given the size of the sector which will require increasingly sophisticated approaches to service planning and coordination during upcoming phases of growth and development. In the short to medium term, a systematic approach to recovery from the policy decisions associated with the pandemic will support comprehensive approaches to the industry's rebound.

Why is this a priority?

- A range of large tourism infrastructure developments are planned for the region over the next 10 years; a coordinated approach could help to maximise the value of these developments for visitors and the tourism industry.
- Multiple stakeholders are required to coordinate services and infrastructure critical to the region's visitor market, including access to NT Parks, the provision of quality infrastructure, and delivery of essential services.
- The potential to extend the current visitor season by ensuring attractive experiences are available year-round will require coordination across government and industry.
- The potential for industry development is limited by the availability of human and financial resources available – efficient use of existing resourcing is an important consideration for facilitating sustainable development.
- Perceptions of limited value for money reported by visitors to the NT may be enhanced through more systematic approaches to planning and delivery of enabling tourism infrastructure and services.
- Stakeholders across the industry have identified a range of service and infrastructure gaps in the region, such as limited public transport services, and poor telecommunications services.

Actions	Lead	Partner	Outcomes
15. Leverage 'Reducing Red Tape Review' for the tourism industry (2016) to complete an audit of opportunities for reducing red tape and encouraging entrepreneurialism and business development in the sector.	DITT	TNT, TTE	<ul style="list-style-type: none"> • Reduction of red tape experienced by the tourism industry • Enhanced entrepreneurialism and business development among existing and prospective tourism operators
16. Review and consider opportunities for enhanced public transport provisions between Darwin and rural Darwin areas and communicate findings to TNT.	DIPL	TNT	<ul style="list-style-type: none"> • Mapping of public transport services and assessment of opportunities for improvement
17. Plan solutions for peaks in essential service demand in more remote towns and communities in the region.	LGAs	PIT	<ul style="list-style-type: none"> • Enhanced capacity and essential service provision outcomes among remote communities in peak season • Enhanced visitor experience
18. Explore opportunities for workforce skilling and development across the tourism sector, addressing short, medium and long-term approaches to workforce development.	DITT	TNT, ATC, DCMC, DTF, ISACNT, LNAC, TLC, HNT, TTE, CDU	<ul style="list-style-type: none"> • Development of a tourism-specific workforce skilling plan • Improved workforce outcomes in the NT tourism and hospitality industries
19. Work with the Australian Government to prioritise communications infrastructure to improve network speed and reliability, including eliminating 'black-spots' in the region.	DCDD	DIPL, Australian Government, TNT	<ul style="list-style-type: none"> • Enhanced telecommunications network & reliability in the region

Capacity building activities

The capacity and capability of the tourism sector to deliver quality tourism experiences and support the sustainable growth of the industry in the Greater Darwin region will be critical as the local industry seeks to introduce further offerings and extends to year-round tourism. Currently, capacity of operators is moderate to high, with pockets of variation across the region. Strengthening the capability of operators to respond to an increasingly complex visitor market and competitive global industry will support the region to continue to grow and advance.

Why is this a priority?

- There is variable capacity and capability across the sector with a need for targeted support to ensure quality experiences are more consistently delivered across the industry.
- The pipeline of development opportunities for the tourism sector in the region warrants ongoing investment in capacity building initiatives that will enable delivery of projected outcomes.
- NT destination satisfaction survey data identified feedback that opportunities exist to improve destination awareness, value for money and food options in the region.

Actions	Lead	Partner	Outcomes
20. Identify needs for skill development in visitor market analysis, digital marketing, and online market engagement.	PIT	Tourism operators	<ul style="list-style-type: none"> • Enhanced skills and capacity of tourism operators to build the region's tourism industry
21. Identify capacity barriers to the delivery of tourism and hospitality experiences across the shoulder and low seasons – to support expansion of the visitor year period.	PIT	Tourism operators	<ul style="list-style-type: none"> • Identification of product development opportunities in the region • Enhanced quantity of products available to visitors in the shoulder and low seasons in the region
22. TNT in partnership with the NT Aboriginal Tourism Advisory Committee (ATC) and industry to continue implementation of the <i>Northern Territory Aboriginal Tourism Strategy 2020 – 2030</i> .	TNT	ATC, Tourism operators	<ul style="list-style-type: none"> • Increased quantity and quality of tourism experiences in the region
23. Maintenance of main thoroughfares and central public facilities to create 'welcoming public spaces' across the region.	LGAs	TNT, DCMC	<ul style="list-style-type: none"> • Enhance visitor perceptions of safety and security among visitors • Enhance visitor experience



Aboriginal cultural tour, Darwin
Image: Rhett Hammerton



Product development opportunities

In consultation with stakeholders, priority product development opportunities have been identified to support the sustainable development of tourism in the region. *A complete of these opportunities is detailed in Appendix A of the full plan.*

With consideration of industry insights, product development opportunities have been prioritised according to their ability to drive visitation outcomes and ease of implementation.

Region	Project	Current status	Impact on visitor demand	Ease to implement
Greater Darwin region	Expand the quantity and quality of Aboriginal cultural offerings in the region	Existing	Max	High
Greater Darwin region	Deliver infrastructure upgrades to regional and remote art centres/ arts trail commitments in the region	Existing	High	High
Greater Darwin region	Develop adventure tourism in the region (4WD, long hikes, MTB trails, zip-lining)	New	High	High
Greater Darwin region	Upgrade of telecommunication services	Existing	High	Mod
Darwin	Larrakia Cultural Centre	New	Max	High
Darwin	Sunset strip development activating the Darwin Harbour area from East Point through to Cullen Bay	Existing	High	High
Darwin	Darwin CBD Sports Stadium & entertainment precinct	New	Max	High
Darwin	Darwin Waterfront redevelopment	Existing	Max	High
Darwin	Darwin CBD revitalisation: Civic and State Square masterplan delivery	New	Max	High
Darwin	State Square art gallery	New	Max	High
Darwin	Darwin International Airport resort development	New	Max	High
Darwin	Frances Bay marina precinct development	Existing	Max	High
Darwin	Museum and Art Gallery of the Northern Territory (MAGNT) upgrades, expansion and development	Existing	High	High
Darwin	Education and Community Precinct - New CDU campus in Darwin CBD	New	High	High
Unincorporated	Litchfield National Park: Central Valley project development and upgrades to existing sites	New	Max	Low
Unincorporated	Litchfield National Park: Establish accommodation resort	New	Max	High
Tiwi	Establish AFL exhibition matches to be hosted on Tiwi (including infrastructure)	New	High	Mod
Tiwi	Aboriginal led fishing/hunting and bush foods tours	New	High	Mod

Source: NT DIPL infrastructure Priority List 2021; Deloitte

Legend

Nature-based offerings
Aboriginal cultural offerings
Activity-based offerings
Culture, history and heritage offerings
Infrastructure development
Tourism facilities

Ease to implement

- Low: Few barriers to implementation exist
- Mod: There are some barriers to implementation
- High: There are many barriers to implementation



2021 Telstra NATSIAA installation view.
Courtesy of MAGNT. Image: Mark Sherwood

Implementation

The Department of Industry, Trade and Tourism (DITT) will lead the implementation of the DMP, through its agency Tourism NT. The effective implementation of the plan will be contingent on the support and contribution of several stakeholders including Tourism Top End, Hospitality NT, DIPL, DCMC, LGAs, DEPWS, community representative organisations, tourism operators, and peak associations. Accordingly, it is important that sufficient resources are invested in stakeholder relationship management, particularly in the early stage of implementing the DMP.

A Project Implementation Team (PIT) will oversee the implementation of the DMP. Its members will include:

- City of Darwin
- City of Palmerston
- Coomalie Council
- Darwin Waterfront Corporation
- Department of Environment, Parks and Water Security
- Department of Infrastructure, Planning and Logistics
- Department of the Chief Minister & Cabinet
- Hospitality NT
- Larrakia Development Corporation
- Larrakia Nation Aboriginal Corporation
- Litchfield Council
- Northern Land Council
- Tiwi Land Council
- Tourism NT
- Tourism Top End
- Wagait Council

Monitoring and evaluation

The DMP establishes a range of strategic actions focused on building the tourism experience in the region as priorities, followed by an investment in the capacity of the industry. Ideally this staggered investment will work to establish a feedback loop of market growth and industry capability development to support sustained growth.

The long-term timeframe for the DMP establishes a need for regular monitoring and evaluation of the effectiveness of the plan in supporting industry growth. This will include annual progress reports and an annual review score card. Detailed reviews of the DMP will be completed every two years to ensure the action plans and priority product development opportunities align with the region's growth.



Mindil Beach Sunset Markets
Image: Tourism NT/Shana McNaught



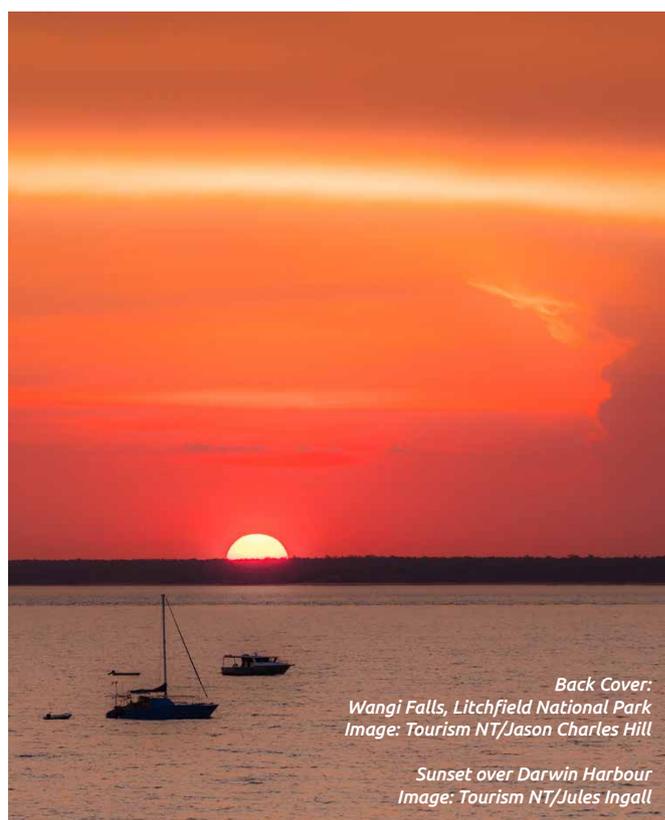
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Acronyms

Acronyms	
ATC	Aboriginal Tourism Committee
CDU	Charles Darwin University
DEPWS	Department of Environment, Parks and Water Security
DCDD	Department of Digital and Corporate Development
DCMC	Department of Chief Minister & Cabinet
DIPL	Department of Infrastructure, Planning and Logistics
DITT	Department of Industry, Tourism and Trade
DTF	Department of Treasury and Finance
DTHFC	Department of Territory Families, Housing and Communities
GRP	Gross Regional Product
HNT	Hospitality NT
ISACNT	Industry Skills Advisory Council NT
LDC	Larrakia Development Corporation
LGA	Local Government Authority
LNAC	Larrakia Nation Aboriginal Corporation
MAGNT	Museum and Art Gallery of the Northern Territory
NTMEC	Northern Territory Major Events Company
PIT	Project Implementation Team
TLC	Tiwi Land Council
TNT	Tourism NT
TTE	Tourism Top End



Back Cover:
Wangi Falls, Litchfield National Park
Image: Tourism NT/Jason Charles Hill

Sunset over Darwin Harbour
Image: Tourism NT/Jules Ingall



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