



Greater Darwin Region Destination Management Plan 2022



Key Partners



Acknowledgement of country

Tourism NT respectfully acknowledges the Larrakia, Tiwi, Wulna, Limilngan, Uwnmil, Kungarrakan and Awarai (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.



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*Front cover:
Berry Springs Nature Park
Image: Tourism Australia/Nicholas Kavo*

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

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The Greater Darwin Region Destination Management Plan



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.*

The Greater Darwin region incorporates the lands of the Larrakia, Tiwi, Wulna, Limilngan, Uwnmil, Kungarrakan and Awarai (Warai) people.

The Larrakia (saltwater) people are the Traditional Owners of the Darwin region, and their country extends to Cox Peninsula in the west, Gunn Point in the north, toward Adelaide River in the east and southward to the Manton Dam area.¹ Many popular sites around Darwin hold specific meaning for Larrakia people, such as Stokes Hill, Mindil Beach, Rapid Creek and Casuarina Beach.²

The Tiwi Islands are located approximately 80km north of Darwin in the Arafura Sea and consist of two large inhabited islands, including Bathurst and Melville, and numerous smaller uninhabited islands.³ Occupation and ownership of the Tiwi Islands by Tiwi people has extended thousands of years, with the majority of the population occupying the three major communities: Wurrumiyanga on Bathurst Island, and Milikapiti and Pirlangimpi on Melville Island.⁴

The Traditional Owners of the lands surrounding Batchelor (Coomalie) are the Kungarrakan and Awarai (Warai) people. The Warai people have traditional country around Rum Jungle and southward to Brocks Creek.⁵ Kungarakany people were often referred to as the paperbark people and Kungarakany Gini are known as freshwater people, recognising the abundant waterholes and country connected to Kungarrakan sacred sites.⁶ Popular tourism destinations such as Buley Rockhole, Tolmer, Florence and Wangi Falls, Berry Springs Nature Park and the Territory Wildlife Park are sites of cultural significance to Kungarrakan and their neighbours.

The Adelaide River runs through the traditional lands of, among others, Warai and Limilngan-Wulna peoples. Djukbinj National Park is part of the Adelaide River catchment and Limilngan-Wulna people speak for this land and manage it in partnership with the Department of Environment, Parks and Water Security (DEPWS).⁷

The Greater Darwin region encompasses the wetland, savannah and woodland country of the Mary River National Park, 100km east of Darwin. The park lies within the traditional country of the Limilngan people in the north and west and Uwnmil people to the south.⁸

*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.

Introduction

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 outlines 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.

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

Tourism in the Greater Darwin region

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

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 community, 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.⁹

A snapshot of the region's key tourism destinations and existing experiences is shown in *Figure 1*. The snapshot also highlights the range of potential tourism experiences to be developed in the region – which were identified during stakeholder consultations (marked in blue). The quantum and breadth of tourism offerings reflected in the snapshot illustrate the maturity of the tourism sector in the region. The opportunities for identified product development look to expand the existing range of experiences, address identified gaps in meeting visitor demand and generate an uplift in quality and quantity of experiences in the region.



Tiwi Islands annual art sale
Image: Tourism NT/Helen Orr

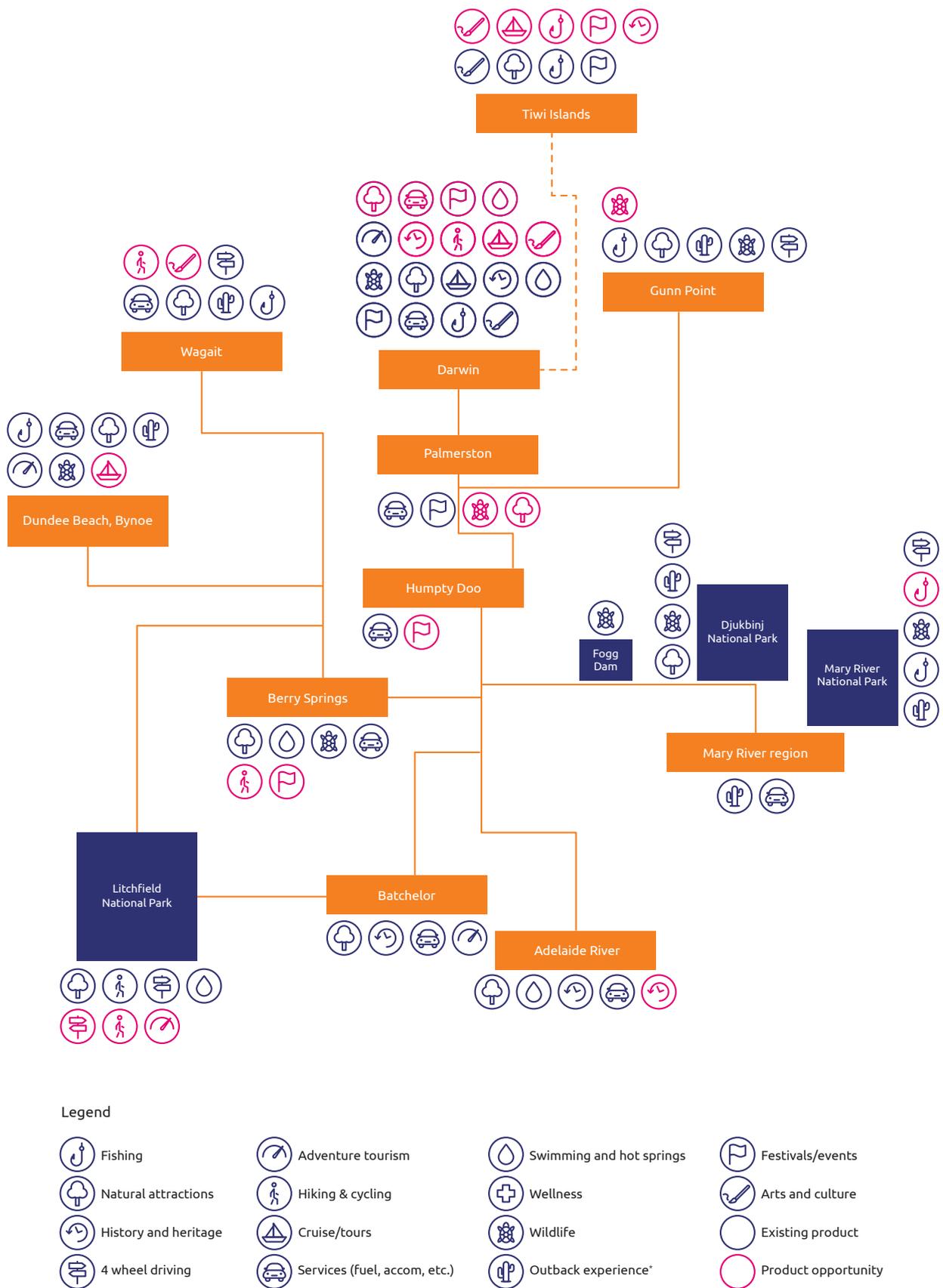


Figure 1 - Snapshot of tourism destinations and experiences in the Greater Darwin region
 Source: Deloitte

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

Greater Darwin Region Destination Management Plan

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.

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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.

Scale of the tourism sector

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.¹⁰

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.

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).¹¹

Across the five years to June 2020, the Greater Darwin region received an average of 903,000 overnight visitors per year, the vast majority of which were Australian domestic travellers (86%), seven out of ten of which were from interstate.¹²

In 2019-20, the region experienced a decline in visitor numbers due to the onset of the COVID-19 pandemic in March 2020, resulting in a 36% decrease in visitation to 648,000 visitors. International visitors were down 16% to 108,000, interstate visitors were down 32% to 435,000 while intrastate visitors also fell 19% to 212,000 - driven by a reduction in visitation to outer Darwin.^{**13}

The majority of international and domestic visitors to the Greater Darwin region travel by air, with motor vehicle use the most common form of transport among intra-Territory visitors to the region.¹⁴

Tourism in neighbouring regions

The relationship between the Greater Darwin region and other tourism regions offers important insights to help guide destination management planning and implementation. The Greater Darwin region is critical to the tourism industry in neighbouring regions because of the high volume of travellers moving between these regions, as seen in *Table 1*.

Travel from the Greater Darwin region to other NT tourism regions is not as common as in some other regions. This is reflective of the relatively large number of visitors to the region, and that a significant subset of visitors only visit Darwin. However, given that Darwin attracts a substantial number of both international and domestic visitors, regional dispersal from the region still represents a significant source of travellers to other regions. Around 450,000 travellers to other NT tourism regions commenced their trip in the Greater Darwin Region.¹⁵

Analysis of regional relationships shows Greater Darwin is pivotal in facilitating domestic and international visitation across the NT, given the region attracts the greatest number of both domestic and international visitors among regions in the NT.

*Note: Figures reflect both FTE and PTE total employment.

**Note: Outer Darwin includes the areas of Litchfield National Park and Batchelor.



Gunn Point
Image: Tourism NT/Jake Appleby

Transport connections to the region

While the majority of visitors to the region arrive by air, there are multiple additional travel options that support diverse visitor markets and provide unique opportunities to drive visitation in the region, including drive, rail and sea travel.

Table 1 - Greater Darwin visitors travelling to other NT tourism regions, number and share of total travellers

Region	Visitor	Number	Proportion of total
Kakadu Arnhem	International	33,000	3.7%
	Domestic	63,000	7.0%
Katherine Daly	International	30,000	3.3%
	Domestic	100,000	11.0%
Barkly	International	10,000	1.1%
	Domestic	44,000	4.8%
Alice Springs and MacDonnell Ranges	International	32,000	3.5%
	Domestic	71,000	7.9%
Lasseter	International	29,000	3.3%
	Domestic	39,000	4.3%

Note: The figures in this table represent the percentage of travellers to the Greater Darwin region that go on to travel to other tourism regions.

Source: Tourism Research Australia, International and National Visitor Surveys, 2019.

Air

Air travel is the primary means of travel among visitors to the Greater Darwin region. Darwin has an international airport and, as the closest Australian gateway to South East Asia, has a unique geographic advantage in attracting international visitors. The terminal at Darwin International Airport is open 24/7, located just 13 kilometres from Darwin City, and with both domestic and international flights leaving from the same building, adding to travellers' ease of convenience. As technology in air travel continues to improve accessibility between Darwin and Asia, the use of narrow-body aircraft is likely to provide further opportunities for the region.

Research indicates there are significant opportunities in the fly-drive market – visitors who enter the Territory by air and then travel within by vehicle. This market segment is motivated to experience the Territory's iconic nature and scenery and is seeking inclusive packages providing airfares, vehicle hire and accommodation. Given the importance of the Darwin International Airport for international travellers to the NT, the Greater Darwin region will play a significant role in supporting the development of this market segment. The fly-drive market provides an opportunity for collaboration between tourism operators in the NT – working to package experiences for visitors across the diverse tourism regions of the NT.

The Darwin International Airport is undergoing significant developments and upgrades to support future growth, including a projected increase in passenger movements from just over 2 million in 2017 to almost 6 million passengers by 2037¹⁶ based on the airport's 2017 masterplan. In November 2021, Darwin was selected as the destination for restarting international travel between Australia and London, following changes to the travel restrictions established for management of the COVID-19 pandemic.





Road

The vast majority of intra-Territory visitors to the Greater Darwin region arrive by car. Over one third of international visitors engage in drive-tourism when visiting the region, as well as almost 30% of interstate visitors.¹⁷ There are many key roads and drive routes through the Territory and across Northern Australia, providing unique opportunities to grow drive tourism in the region. Realisation of this opportunity relies heavily on the region's connectivity to the Big Rivers region which is the junction point for the primary roads connecting the north and south of the Territory and east and west of Northern Australia.

Key drive tourism connections are discussed in *Table 2*, and include connections between the Greater Darwin region and other states, regions in the NT and unique outback locations. *The Northern Territory Drive Tourism Strategy 2021-2030* identified a need to prioritise and advocate for investment in key drive routes in the NT. Recognising that drive visitation is an important market for the NT tourism industry, the strategy focuses on:

- attracting new markets to increase visitation
- improving visitor experience to increase length of stay
- increasing regional dispersal to improve tourism outcomes in regional areas
- enhancing brand reputation to attract target visitor markets.

Opportunities identified to support and enable such outcomes in neighbouring regions include:

- new investment in roads supporting access to NT Parks and National Parks run by Parks Australia
- safety improvements to existing infrastructure
- enhanced marketing of unique drive routes
- ensuring consideration of tourism benefits when assessing and planning new road infrastructure
- modernisation of camping and RV grounds
- working with Land Councils and Traditional Owners to develop tourism opportunities along key drive routes.

Table 2 - Greater Darwin visitors travelling to other NT tourism regions, number and share of total travellers

Route	Tourism contribution in the Greater Darwin region	Key destinations of the Greater Darwin region on the route
Explorers Way/ Stuart Highway	The primary connection of northern and central NT and South Australia. This highway connects Darwin to the Big Rivers region, creating a connection through to WA, QLD and East Arnhem Land	Darwin, Adelaide River
Arnhem Highway	Highway connecting Greater Darwin and Kakadu Arnhem regions	Djukbinj National Park, Mary River National Park, Fogg Dam
Cox Peninsula Rd	Connection from Stuart highway (south of Humpty Doo) to Cox Peninsula	Berry Springs, Mandorah
Litchfield Park Rd/ Greater Litchfield Loop	Loop road from Stuart Highway (east) – providing access to Litchfield National Park via Berry Springs to Wangi Falls, and Cox Peninsula Rd (north) - via Batchelor or vice versa The loop encourages visitors to Litchfield National Park to expand their journey to Dundee and Bynoe	Litchfield National Park, Berry Springs, Batchelor, Dundee Beach, Bynoe
Howard Springs/ Gunn Point Road	The roads connecting the Stuart Highway and Gunn Point	Howard Springs, Gunn Point
Savannah Way	A unique drive journey connecting the north of WA, NT and QLD, of which Darwin via Stuart Highway is promoted as an adjoining route	Darwin, Adelaide River
Nature's Way	A drive journey loop commencing in Darwin along the Arnhem Highway to Kakadu National Park, returning along Stuart Highway encouraging nature lovers to visit Kakadu National Park (managed by Parks Australia) and NT's National Parks - Litchfield and Nitmiluk (Katherine) Gorge	Darwin, Litchfield National Park

Source: Deloitte



*Corroboree Billabong, Mary River Wetlands
Image: Tourism NT/Corroboree Billabong Wetland Cruises*

Rail and sea

In addition to air and drive travel, rail and sea travel are significant transit options for visitors to the region. Rail transport is a luxury travel journey offered by The Ghan through the centre of Australia connecting Adelaide and Darwin, a recognised bucket-list experience. Travellers on The Ghan can access tourism experiences in Alice Springs and Katherine during the journey. The Ghan experience includes tours as part of its bookable product in addition to supporting a number of pre and post travel opportunities for visitors before they depart or when they arrive in Darwin.

Sea travel options include ferry, cruise and yachting options. Darwin's location positions it to offer visiting international cruise ships a first point of entry to Australia. The cruise sector is a key opportunity for tourism development in the Greater Darwin region, with the sector having experienced significant growth in the decade between 2009 and 2019. In that period, passenger days in the NT almost tripled to a total of 60,205 in 2019.¹⁸ The cruise industry is uniquely supportive of developing tourism opportunities through expedition cruising and onshore experiences which bring business to operators during the regions' traditional low seasons (October to April).

Superyachting is also identified as an opportunity for visitor attraction in the Greater Darwin region. In 2018, there were a total of 263 vessels in the Australasian region – up from 218 in 2015, increasing by 15 vessels on average by per year.¹⁹ A scoping study undertaken by the NT Government found that the superyacht industry had the potential to contribute as much as \$146 million to the Territory economy by 2028.¹⁹

The region's premium northern positioning provides a unique opportunity to capture a larger share of the growing cruise and Australasia superyacht sector. Opportunities to grow the sector are enhanced by the NT Government's investment in a marine park, which will deliver the services and infrastructure capability to host such vessels. Further to the development of industry capability, additional challenges to be overcome that could enable development of the cruise industry include:

- additional berthing and passenger clearance capability
- facilities for boarding and clearance of superyachts
- enhanced international marketing and awareness of the NT as a cruise and superyacht destination
- greater promotion of Darwin as a gateway to regional cruise and yachting destinations

Ferries offer an important transport service for residents and travellers moving between Darwin and Mandorah, and between Darwin and the Tiwi Islands. Ferry services in the

region are provided by the SeaLink Travel Group (SeaLink), which offers both travel services and tourism experiences. In 2017, SeaLink reported 150,000 annual passenger movements between Darwin and Mandorah, and 25,000 annual passenger movements between Darwin and the Tiwi Islands²⁰. Opportunities to further develop ferry related tourism experiences include:

- development of associated cultural tourism products
- remote community experiences
- regional adventure touring in remote wilderness rivers and coasts.



*The Ghan rail journey
Image: Tourism NT/Daniel Tran*

Experiences connecting the region

Several common experiences and attractions span multiple tourism regions in the Territory, as shown in *Table 3*. 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.²¹



*Mindil Beach Sunset Markets
Image: Tourism NT/Shana McNaught*

Table 3 - Common experiences and attractions in NT regions

Attraction	Greater Darwin	East Arnhem Land	Kakadu	Big Rivers	Barkly	Alice and MacDonnell Ranges	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



Wave Pool, Darwin Waterfront
Image: Tourism NT/PRLX - Felix Baker

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.

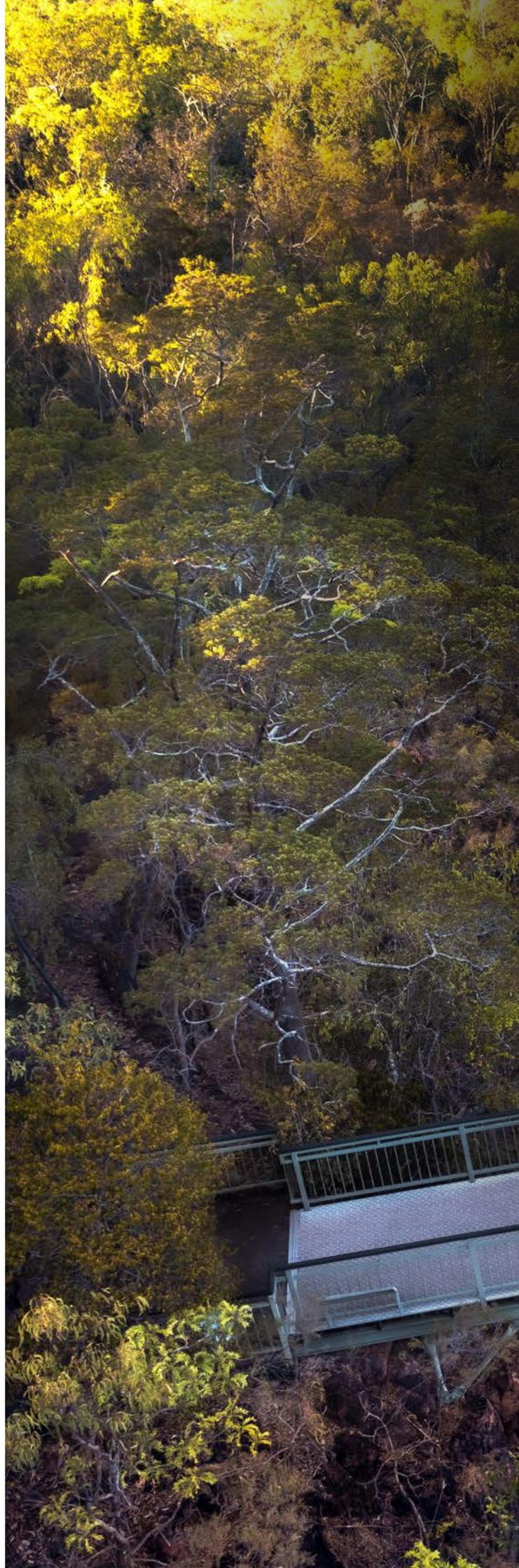
This analysis has highlighted that there are many strengths in the Greater Darwin region's tourism offering, and given this strong base, a real potential for further development of the destination. By leveraging the region's unique attractions and building on the strengths of the current capacity of 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 sought after 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.



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.



Buley Rockhole, Litchfield National Park
Image: Tourism NT/Backyard Bandits

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 region²², 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.

Stakeholder consultation

An advanced pipeline of opportunities to develop the tourism industry in the Greater Darwin region have been identified by stakeholders. Consultation outcomes emphasise the maturity of the region's tourism industry, and the opportunity to harness this capacity to build the prominence of the region as a unique tropical Australian destination, steeped in culture.

Recognising the importance of consultation and industry engagement, a working group was established to guide the development of the DMP. The working group comprised of leaders across the Greater Darwin region's tourism industry as well as local government, NT government and community leaders. The working group will go on to become the Project Implementation Team (PIT), responsible for overseeing implementation of the DMP. Membership of the PIT is detailed at the end of this section of the plan.

While the main focus was face-to-face engagement, with over 65 individuals participating at public events hosted in the Tiwi Islands, Palmerston, Coomalie, and Darwin, this was supplemented by an online survey option for stakeholders that could not participate in workshops. Thirty unique responses were received via the survey, in addition to email feedback and regular meetings with the working group.

Detailed notes were collected from all stakeholder engagements, resulting in an extensive pool of qualitative data. Survey responses provided additional data insights and thematic analysis. Thematic analysis was used to identify themes from all the discussions held.



Consultation outcomes

The results of the consultation and data analysis are presented as holistic assessment of the industry, and their consideration of the Greater Darwin regions:

- strengths and comparative advantages
- gaps and threats
- opportunities; and
- action plan for industry development.

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 developing visitor experiences in the region

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 2* to support the sector’s growth.

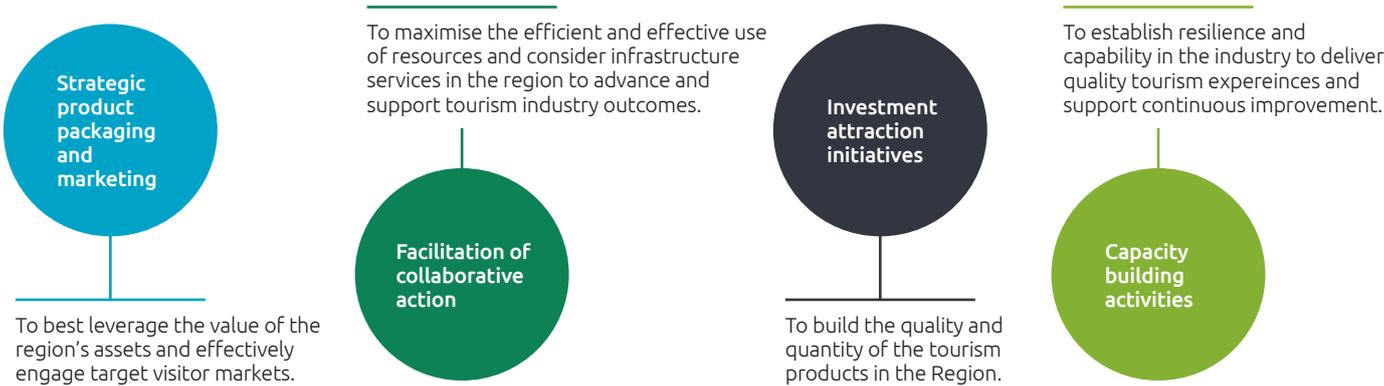


Figure 2 - Approach to destination development
Source: Deloitte

Industry opportunities and gaps

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 product.

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 4. For each opportunity or gap, suggested approaches and actions are identified in the table and described in detail in the action plan which follows.

Table 4 - Current opportunities and gaps in the Greater Darwin region tourism industry

	Description	Approach	Action
OPPORTUNITIES	<p>Development of year-round destination</p> <p>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.</p>	<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
	<p>New product development</p> <p>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></p>	<ul style="list-style-type: none"> Investment attraction initiatives Capacity building activities 	1, 2, 3, 4, 6, 22
	<p>Maximise festival and events</p> <p>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.</p>	<ul style="list-style-type: none"> Strategic product packaging and marketing Facilitation of collaborative action 	8, 9
	<p>Enhance collaboration</p> <p>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.</p>	<ul style="list-style-type: none"> Facilitation of collaborative action 	1, 3, 4, 8, 9, 10, 11, 16, 17, 19, 20, 21, 22
	<p>Expanded promotion</p> <p>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.</p>	<ul style="list-style-type: none"> Strategic product packaging and marketing 	7, 12, 13, 14
	<p>Enhanced skillset</p> <p>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.</p>	<ul style="list-style-type: none"> Capacity building activities 	20, 21
	<p>Streamlined processes</p> <p>Opportunities exist to continue to refine regulation and processes, to limit red and beige tape which deters business development.</p>	<ul style="list-style-type: none"> Facilitation of collaborative action 	15

Table 4 - Current opportunities and gaps in the Greater Darwin region tourism industry

	Description	Approach	Action
	<p>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.²³ Concept testing aligning with broader networks and existing public systems could support the development of sustainable public transport options.</p>	<ul style="list-style-type: none"> Facilitation of collaborative action 	16
	<p>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</p>	<ul style="list-style-type: none"> Capacity building activities Facilitation of collaborative action 	17
GAPS	<p>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.</p>	<ul style="list-style-type: none"> Facilitation of collaborative action Investment attraction initiatives 	1
	<p>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.</p>	<ul style="list-style-type: none"> Capacity building activities Facilitation of collaborative action 	23
	<p>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 to address transiency and train and upskill existing workers.</p>	<ul style="list-style-type: none"> Capacity building activities Facilitation of collaborative action 	18

Product development

In consultation with stakeholders, priority product development opportunities have been identified to support the sustainable development of tourism in the region. *A complete list 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.

Table 5 lists the priority product development opportunities for the region (being rated either maximum or high impact on visitor demand).

Table 5 - Priority product development opportunities in the Greater Darwin region

Region	Project	Current status	Impact on visitor demand	Ease of implementation
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 Plan 2021-2030; 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

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 opportunities that are yet to be developed, and existing product 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 region²⁴
- 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, DCMC, TTE, 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 product 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 product 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, DCMC, TTE, 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 to 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	<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 product/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

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 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



Tiwi Islands Grand Final and Art Sale
Image: Tourism NT/Shana McNaught



Jumping crocodile cruise, Adelaide River
Image: Tourism NT/Lynton Crabb

Implementation, monitoring and evaluation

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

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.

2



The Greater Darwin Region



The Greater Darwin region hosts Australia's only tropical capital city. It offers unique historical experiences, a deep connection to Aboriginal culture, an inclusive multicultural community, and access to the Territory's amazing natural wonders – the region offers a truly unique experience for domestic and international tourists alike.

Introduction

Tourism is one of the most valuable industries contributing to the Northern Territory (NT) economy, and identified as one of five growth sectors in the NT Economic Development Framework. In the NT in 2019-20 tourism contributed:²⁵

- \$0.9 billion direct Gross State Product (GSP)
- \$1 billion indirect GSP
- 7,300 direct jobs
- 5,200 indirect jobs.

To secure the future prosperity of the tourism industry in the NT, the Department of Industry, Tourism and Trade developed the NT's *Tourism Industry Strategy 2030* (the Strategy). The Strategy identifies the need to establish Destination Management Plans (DMPs) for tourism regions in the NT, as part of a systematic and sustainable approach to the growth of the industry.

Regional destination management planning aims to:

- identify key strengths and assets for each region; and
- recommend actions to activate opportunities, address gaps and identify potential investments - to meet visitor demand.²⁶

The Greater Darwin Destination Management Plan offers a strategic, strengths-based approach, focusing on the abundant positive characteristics of the region to enable the development of the tourism industry over the next ten years.

DITT has developed destination management plans in the NT regions of:

- Big Rivers (Katherine-Daly)
- Barkly
- Alice Springs and MacDonnell Ranges
- Lasseter
- East Arnhem Land.

All of the DMPs for the NT, including this Greater Darwin Destination Management Plan, consider the development of the region, in addition to considering how the region connects with other tourism regions in the NT and beyond.

The Greater Darwin region

The Greater Darwin region as shown in *Figure 4*, covers over 30,000 square km.²⁷ The region contains the cities of Darwin and Palmerston, is bordered by the Timor Sea to the North, with Tiwi Islands across the gulf, and extends south to Adelaide River, east to Mount Bundy on the Arnhem Highway, following the Mary River up to the Van Diemen Gulf. This region is comprised of seven LGAs: City of Darwin; City of Palmerston; Litchfield; Coomalie; Tiwi Islands; unincorporated NT²⁸; and 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 from Asia and the Pacific.

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.

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

A summary of each of the key destinations in the region is outlined in Appendix C.



Berry Springs Nature Park
Image: Tourism NT/ARB



Figure 4 - Greater Darwin region map

Source: Community id, Deloitte

Social and economic context

The region's social and economic profile suggest there are supportive factors for continued economic development, with an increase in Gross Regional Product (GRP) of 10.5% between 2018 and 2020.²⁹

The region's estimated resident population in 2020 totalled 151,251 residents, representing 61% of the NT population.³⁰ 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.³¹

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)³²

Australia's Regional Tourism Satellite Account which considers the broad economic contribution of the tourism industry across the economy, highlights that the sector added \$691 million to the Greater Darwin region's economy in 2019-20.³³

In addition, Darwin directly employed 4,700 people in the tourism industry, 5.7% of the working population. 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.³⁴

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

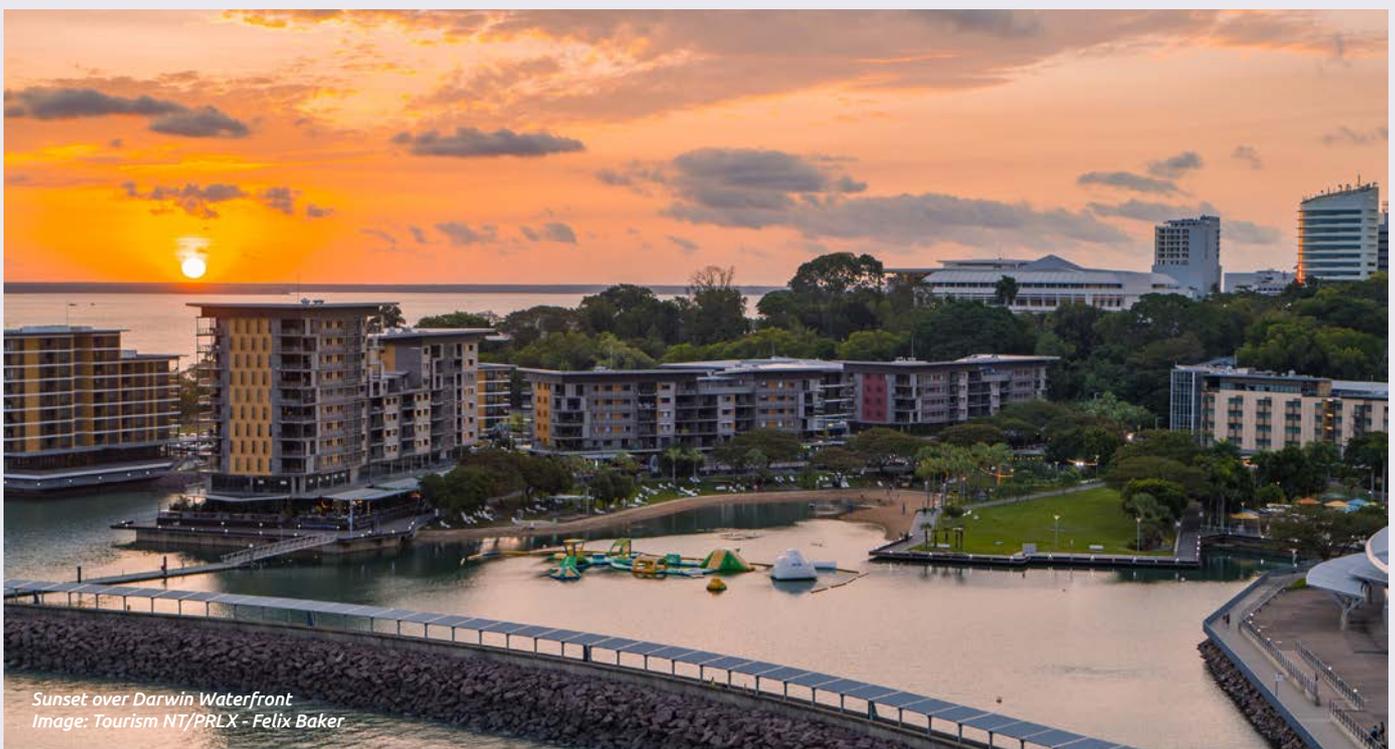
Appendix B discusses the region's social and economic profile in more detail.

Tourism offerings in the region

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.

Darwin offers a range of unique experiences including insights and connections to Australia's ancient Aboriginal cultures, history, access to renowned nature experiences like Litchfield National Park, and a diverse range of sporting, arts and cultural experiences throughout the year.

With a capital city and diverse industry base, Darwin offers a large range of amenities, food and beverage options, and lifestyle experiences for visitors.



Sunset over Darwin Waterfront
Image: Tourism NT/PRLX - Felix Baker

Experiences in the region

A diverse array of high-quality experiences that are well aligned to visitor demand exist in the region.

Nature, sporting and recreational activities

The Greater Darwin region hosts many natural attractions, including wetlands, swimming holes, natural springs, along with an abundant river system. The landscapes in the region offer visitors a tropical and outback environment to explore. Wildlife presents another key attraction to the region, noted for its uniqueness and varied ecosystems, being home to a number of species including crocodiles, migratory shorebirds, tropical waterbirds and estuary fish species.

Multiple nature-based activities capitalise on the region's natural assets, include fishing, four-wheel driving, boating, swimming, bushwalking, hiking and camping.

Diverse Parks and nature reserves exist to protect, conserve and enable visitors and Territorians alike to experience these environments.

Aboriginal cultures

Aboriginal cultures in the region are rich and diverse. Deep cultural history and contemporary cultural experiences can be experienced throughout the region, which incorporates the lands of the Larrakia, Tiwi, Wulna, Limilngan, Uwnmil, Kungarrakan and Awarai (Warai) people.

Larrakia people are a vibrant Aboriginal nation of approximately 2,000 and are broadly recognised for their strengths in performance, music and art. Larrakia people refer to themselves as saltwater people, based on their traditional relationship with the sea and trade with neighbouring groups such as the Tiwi people.³⁵



Aboriginal cultural tour, Darwin
Image: Rhett Hammerton

There is high demand for Aboriginal tourism experiences among visitors to the NT, and a variety of offerings are available in the region. Experiences range from visiting Aboriginal arts and cultural centres, festivals and events celebrating Aboriginal cultures, to storytelling and guided cultural tours on country. Tourism experiences on Aboriginal lands such as the Tiwi Islands share the history and rich culture of Tiwi people. Tiwi art is highly distinctive, with traditional stories and designs expressed through paintings, sculptures, ceramics and contemporary practices such as screen-printing, etchings, lino prints and jewellery.³⁶ There are five art centres located on the islands.

History and heritage

The Greater Darwin region has a pertinent history and developed heritage, creating a range of experiences for visitors to engage with. The custodianship of culture and country of Aboriginal people in the region extends over 60,000 years. Darwin's history and heritage involves modern historical events including settlement, the Bombing of Darwin – the largest ever single attack mounted on Australia by a foreign power,³⁷ and the contemporary development of the region – including the redevelopment post cyclone Tracy. Tiwi people played a significant role in Australia's defence during WWII, protecting Australia and Tiwi civilians rescuing 35 Allied forces members, among other heroic feats.³⁸ Coomalie, home to the Kungarrakan people, was the last place in Australia to be bombed by a foreign enemy and the location of the final Australia operational mission of WWII. A variety of museums and sites in the region recognise and offer historical experiences for visitors, providing information, insights, and historical experiences, exhibits, displays, signage, walks, buildings, and tours.

Food and lifestyle

Darwin's laid-back tropical environment provides an ideal outdoor lifestyle to indulge in some of the most vibrant and beautiful settings in Australia. A range of high-quality accommodation options are available in the region to deliver rest and relaxation experiences to visitors seeking to embrace the tropical environment.

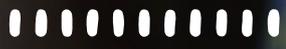
With a multicultural population and a range of high-quality fresh produce, including tropical fruits and native products, the region offers unique food and dining experiences – exemplified by the now annual Laksa Festival and established Glenti festival. The food scene in the region has developed in recent years, with new restaurants, cafes and bars opening or expanding to include new cuisines and al fresco dining spaces.

The region provides a variety of dining experiences, ranging from quintessential Australian outback pubs to fine dining, and a range of cafes, bars and eateries in between.

Opportunities for food and drink attractions are anticipated to grow over the short to medium term, through developments to embrace and showcase local produce and advancements in local brewing and distilling.

Darwin is also renowned for its market food experiences, including the well-known Mindil Beach Sunset Markets, Parap and Malak Markets which operate alongside the smaller Nightcliff and Rapid Creek markets.

3



Destination management planning





The Greater Darwin Destination Management plan (DMP) aims to guide the sustainable growth of the tourism industry in the region and the Territory more broadly. The Plan considers the region's tourism products, visitor trends and expectations, and contributing social and economic factors for tourism planning, to form a holistic and strategic approach to the growth of the industry over the next 10 years.

Introduction

Destination management planning is a comprehensive approach to regional tourism development, accounting for social, economic and ecological factors in the destination. It considers the interrelatedness of these factors and their relationship to tourism outcomes.

Destination management is an ongoing process that allows private industry, government and communities to work together to define a unified vision for a destination, identify actions to achieve the industry's desired future, and manage the desired outcomes for a destination.

The Greater Darwin region is the central gateway for many visitors to the NT, making the region a critical consideration for long-term planning for the sustainable growth of the industry in both the region and broader NT.

Theory of destination management planning

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 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
- using a clear, structured and well communicated process to engage all stakeholders in the delivery of the vision.

Imperative for destination management planning

The *NT's Tourism Industry Strategy 2030* highlights the value of investment in key tourism attractions and regions, for the development of the Territory's regions and ultimately the growth of tourism in the Territory.

Increased investment by government and the private sector, targeting the Territory's product and regions which have the capacity to drive visitation, is a core tenant of the Strategy.

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
- identify priority segments for the regions.

Collaboration in destination management

Multiple governing bodies and authorities have an interest and role in the development of tourism and have made investments in tourism infrastructure and services.

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 development of the DMP sought to actively engage a broad range of stakeholders, including those outside of the tourism industry that contribute to the development of destinations. To facilitate discussion and collaboration between all key stakeholders that influence tourism outcomes in the Greater Darwin region, a Working Group was formed, with representatives from the following organisations:

- 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
- Tiwi Land Council
- Tourism NT
- Tourism Top End
- Wagait Council

Some of the aforementioned organisations have published strategies, plans and agreements that impact destination management planning in the region. These documents have been considered in this study, to identify opportunities to leverage collective action, and support strategic investment and allocation of resources in the region.

A summary of the documents as they relate to the DMP is outlined in Appendix D.

Process of destination management planning

This DMP was developed over successive stages of research, consultation, design and refinement.

To inform the early stages of the planning process, a review was undertaken of existing tourism strategy documents, such as the *NT's Tourism Industry Strategy 2030*, *Northern Territory Aboriginal Tourism Strategy 2020 2030*, regional municipal plans and visitor experience plans. Through a combination of document review and desktop research, an understanding of the current state and strategic directions in key destinations in the region was established. This provided a basis to commence destination management planning and aligning the approach with existing strategies.

To build on the baseline data established in the early stages of the process, Deloitte with the support of the Department of Industry, Trade and Tourism (DITT) through Tourism NT, engaged with stakeholders through:

- a working group
- workshops/forums
- a survey
- direct interviews

A summary of the stakeholder consultation process and outcomes is detailed in Chapter 1.

The consultation phase provided key insights from stakeholders across tourism and supporting industries, including input from operators, industry associations, government and community representatives. This input enabled a nuanced DMP design, provided a sense check for the early insights gained through desktop research, and confirmed the priorities of stakeholders in the region, which were further explored through secondary research.

Following consultations, demand data from ReviewPro, and research from Tourism Australia and Tourism NT, combined with insights offered through discussions with national trade partners and operators, were analysed to better understand strategic challenges and opportunities for growth of the tourism industry in the region.



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

4

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Trends in regional tourism



Cultural experience at Pudukul
Image: Tourism NT/Nick Pincott



The Greater Darwin region is accessible and largely attractive to visitors. Growing visitation now relies on nuanced and targeted efforts that better address barriers to visitation and harness opportunities to develop the region's visitor experiences.

Introduction

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 impeding the ability of the region to compete for visitors against 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 impact of COVID-19 on tourism in the Territory

COVID-19 has had significant impact on the tourism sector in the Territory, and devastating outcomes for many tourism operators.

The Territory has seen considerable volatility in visitor volumes at different stages of the pandemic, with dramatic reductions in visitation in the initial Australia-wide lockdown, followed by build-up and high levels of demand for some segments and destinations, and later significant uncertainty given regional lockdowns and wavering traveller confidence.

Alongside the flux of visitors, the Territory has also experienced a shift in the traveller mix, in the travel period and in traveller behaviour and preferences.

Some regions in the Territory, including the Greater Darwin region, have seen a younger cohort now sitting alongside the Territory's usual older visitor demographic.

The period also saw a shift in timing of travel, with interstate visitors travelling to the region in the shoulder and low seasons, along with local and intrastate visitors staying in region creating a greater level of tourism activity during what has traditionally been a quiet period – providing encouragement for the industry's ambition to develop the region as a year-round destination.

The last two years has also seen a shift in traveller behaviour and preferences, 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.



General trends in regional tourism

Low exchange rates, low inflation (until recently), and increases in variable travel-budget options have increased domestic visitation across Australia in recent years. Domestic spend reached a record \$80.7 billion in 2019, with overnight trips increasing 12% from the prior year.³⁹ The latest data (year-ending September 2021) show that overnight spend dropped by 23% to \$60.9 billion in 2021, and the number of overnight trips dropped 29% (relative to 2019 levels).⁴⁰

Additionally, the number of international visitors grew 2% in 2019, with international visitor spending also reaching a record, at \$45.4 billion.⁴¹ However, as a result of travel restrictions related to COVID-19, the number of international visitors and expenditure fell 98.4% and 97.1% in the year ending September 2021.⁴²

Tourism Research Australia's report State of the Industry 2018 identifies the Asian middle class and the youth market as driving growth in tourism in Australia.

Asia contributed 88% of the tourism spend gained in 2019 from 2018, and 69% of the visitor increase. The increasing number of Asian visitors are placing greater importance on experiences and cultural immersion.⁴³

The youth market has shifted tourism demand, through a greater use of low-cost carriers, lower patronage of traditional hotel accommodation, and lower average daily spend. This segment is more likely to be seeking out immersive and authentic tourism experiences.

The region's proximity to Asia, accessibility, unique natural environments and Aboriginal tourism capacity presents significant opportunities to harness the key Asian market. Yet, while both international and domestic visitation is increasing in Australia, enticing visitors to regional and remote Australia remains a challenge.

Research by Deloitte Access Economics⁴⁴ explains that those most likely to visit regional destinations in Australia (in order of demand) include:

- family road trippers (as repeat customers) and reported word of mouth as a key source of information in deciding on a destination
- traditional market Gen Y and Z, on their first trip to Australia are most likely to visit a regional destination
- affluent 55+ Australians, this cohort also enjoys consuming (shopping and eating out) and stay longer in regional destinations.

Conversely, markets less likely to disperse to regional destinations in Australia are:

- Asian markets visiting friends or relatives (VFR), with only 19% travelling to regional destinations on their most recent trip
- festival and event goers, with just 34% of the cohort visiting regional destinations on their last trip; and
- the Asian Gen Y and Z market, with 41% of this cohort having travelled to regional destinations on their most recent trip.

The study identified that the common challenges for regional travel include:

- family and friends are a central motivator for travel, as opposed to place
- time and money constraints, for both domestic and international visitors
- a preference for capital cities, related to shopping, dining and a greater range of experiences
- for domestic travellers, a preference for overseas destinations was noted
- for international travellers, a lack of knowledge about regional Australia was a key barrier to dispersal.

However, it is noted that these trends have been disrupted with the COVID-19 pandemic, with emerging evidence that travel patterns in the NT shifted dramatically in 2020 and 2021. Such changes in travel behaviour are also reflected in other destinations, with reporting from European markets indicating increased domestic tourism flows in low density tourism regions.

The traditional barriers to regional tourism development highlight the need for targeted tourism marketing and communication to viable markets, and the importance of coordinated tourism planning that considers strategic approaches to tourism markets, such as greater information sharing and travel planning support. With ongoing disruption to the market resulting from COVID-19, a focus on visitor market engagement and data collection to anticipate visitor trends will be important for the short to medium term.



Darwin Festival
Image: Darwin Festival/Connor Askham

Festivals and event tourism

Festivals and events can be an effective way to attract visitors to a regional destination. Tourism Research Australia published a survey on regional event tourism in 2014 which found that an event can be a main driver for visitation, with 57% of first-time visitors being primarily motivated to visit by an event. In addition, 75% of the survey respondents advised the event was the only reason driving visitation. The survey found that the most popular events include:

- food and wine
- music related
- garden and botanical
- sport (as a spectator)
- art exhibitions.

Recent research by Deloitte Access Economics considering visitors to regional destinations, identified that of the travel person who prioritise festivals, events and sports when they travel, 34% had travelled to regional destinations in Australia on their most recent trip. For this traveller, sporting events were the most popular form of event on their most recent trip; they were most often inspired by previous travel to the destination, and they stayed on average 6.7 nights in regional Australia compared to 6.1 in capital cities⁴⁵. Notably this cohort is typically male, more likely to live in regional Australia and their travel involves minimal research and point to point travel.

The Greater Darwin region hosts a number of major events facilitated by NTMEC. The region has broadened its small and medium events targeted to grow the attractiveness of Darwin through a number of dedicated collaboratives, such as Activate Darwin and LGAs.

Notable established events demonstrating success in visitor attraction and satisfaction in the region include the Darwin Festival, BASSINTHEGRASS music festival, Territory Day, Darwin Supercars, Million Dollar Fish, Tiwi Islands Football Grand Final and Art Sale, GleNTi, Darwin Aboriginal Art Fair, National Indigenous Music Awards and National Aboriginal and Torres Strait Islander Art Awards.

The region has also attracted professional sporting events, such as Australian Football League (AFL) and National Rugby League (NRL) round fixtures. Smaller local events also contribute to tourism outcomes in the region, and may provide a pipeline of opportunities for development, such as the Darwin International Laksa Festival, Mango Madness Festival and Mandorah Ukulele and Folk Festival.



BASSINTHEGRASS
Image: Tourism NT/Helen Orr

Territory Day fireworks
Image: Tourism NT/Peter Eve

Country to Couture, Darwin Aboriginal Art Fair
Image: Tourism NT/George F Photogaphy



*Country to Couture, Darwin Aboriginal Art Fair
Image: Tourism NT/George F Photography*

Aboriginal tourism

Increasingly, visitors are seeking authentic cultural experiences.

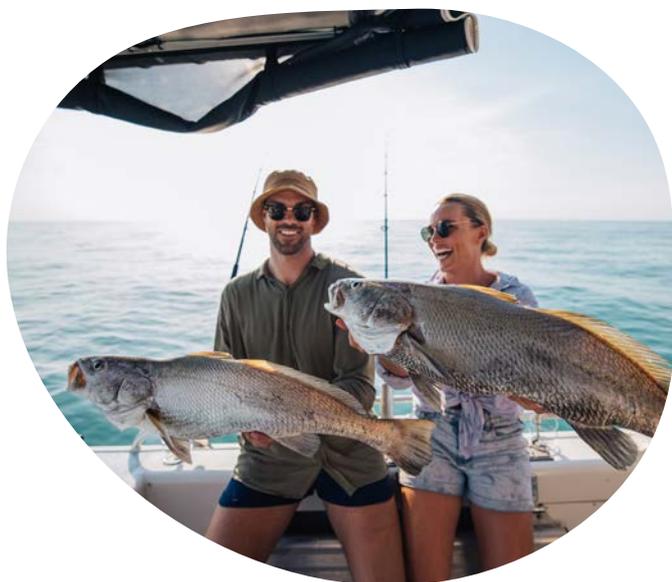
Aboriginal tourism visitors are those who participate in at least one Aboriginal tourism activity during their trip. Demand for Aboriginal tourism is increasing, with the number of international tourists participating in some form of Aboriginal tourism increasing by over 40% between 2013 and 2019. For the year ending September 2019, 77% of international holiday visitors participated in an Aboriginal cultural activity during their trip in the Territory.⁴⁶

Currently the region is not well recognised for its Aboriginal tourism experiences, with other tourism regions in the NT most commonly attracting visitors seeking Aboriginal tourism experiences.⁴⁷ As the Greater Darwin region acts as a key entry point to the NT, and other adjacent regions attract visitors seeking Aboriginal tourism experiences, there is an opportunity for the Greater Darwin region to develop further Aboriginal tourism offerings. These could consider authentic Aboriginal tourism experiences in the Tiwi Islands, the development of products associated with the Larrakia seasons in the Darwin region, and arts and cultural centres/NT arts trail facilities in the region.

The opportunity to further develop Aboriginal tourism in the region is supported by the *Northern Territory Aboriginal Tourism Strategy 2020-2030*, which outlines a vision for the NT to be the undeniable leader in the Aboriginal tourism sector.

The NT was the first Australian jurisdiction and a world leader in officially incorporating dual naming in its naming practices and approving dual names for geographic features.⁴⁸ The NT Government is working to strengthen engagement processes for place naming, particularly for dual and Aboriginal place names. Future destination marketing activities could utilise this policy approach, aligning with outcomes of both the *NT's Tourism Industry Strategy 2030* and the *Northern Territory Aboriginal Tourism Strategy 2020-2030*.

Tourism Australia also recently implemented a dual-language naming convention for Australian destinations by using the known Aboriginal name alongside the English name, to provide higher levels of recognition and elevation of Australia's Aboriginal cultures.



Fishing Charter, Darwin Harbour
Image: Tourism NT/Backyard Bandits

Ecotourism

Nature-based tourism is defined as 'leisure travel undertaken largely or solely for the purpose of enjoying natural attractions and engaging in a variety of nature-based activities.'⁴⁹ Eco and nature-based tourism is becoming more popular and is an attractive investment for regions focused on environmental preservation.

Nature-based tourism was identified as a top reason to visit regional destinations in Australia by both domestic and international visitors.⁵⁰ Nature-based and bucket list holidays were the second and third most popular reasons for visiting regional destinations in Australia by international visitors.

Among international visitors, 'nature-based and/or other outdoor activities' were listed in the top five reasons for visiting regional Australia by Chinese, Japanese, and American markets. Another study showed that 'nature and wildlife' was the number one driver among Chinese, German, Indian, Indonesian, and Korean markets. Overall, Australia was rated as the number one country for nature and wildlife by international travellers.⁵¹

The demand for nature-based tourism, and broad recognition for the quality of nature tourism in Australia presents significant opportunities for the tourism industry in the Greater Darwin region, which is known for its natural wonders, notably Litchfield National Park, and its close association with Kakadu National Park. The region's unique wildlife – such as crocodiles and barramundi are also important and distinctive attributes.

Demand to visit NT Parks is growing, with visitor numbers up 8.4% between 2016 to 2019,⁵² peaking at 3.2 million visitors. In 2020, the number of visitors to NT Parks dropped to 2.3 million – coinciding with the travel restrictions resulting from COVID-19.⁵³ In addition to the opportunities this demand presents, the management of tourism to uphold the natural values of nature destinations including suitable infrastructure and services planning is an important consideration in destination management planning.

*Note: NT Park visitation data excludes visitation to George Brown Botanic Gardens & the Wildlife Parks.

5



Visitor market analysis





A diversity of distinct experiences, including Mindil Beach Sunset Markets, The Ghan and Litchfield National Park, shared with warm Territory hospitality are prominent themes driving positive visitor travel experiences and attraction of return visitors to the Greater Darwin region.

Introduction

In development of the DMP consideration was given to visitor demand insights for the Greater Darwin region, including online visitor feedback, trade partner discussions and insights, national operator feedback, consumer demand research undertaken by Tourism Australia, and Tourism NT destination satisfaction research.

Available data on visitor demand specific to the region is limited, presenting challenges in drawing inferences from the research. Despite these limitations, the insights collected provide an important contribution to destination management planning by offering a point of comparison that can help inform tourism development for the region.

Visitor market profile

The Greater Darwin region welcomed 756,000 visitors in 2019-20.⁵⁴ These visitors spent a total of \$818 million during their trips to the region.⁵⁵

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.⁵⁶

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.⁵⁷

Figure 4 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:^{58***}

- 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.

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

** *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.

Over one-quarter (28%) of domestic visitors are part of the leisure drive market, with NT residents comprising around two thirds (71%) of this group.⁵⁹ Domestic leisure drive market visitors are typically short stay visitors, with 76% staying three nights or less. Among international travellers who visited the region, 43% arrived in Australia through Darwin, with Sydney the second largest entry and exit point.

Over two fifths (43%) of international visitors to the region go on to visit other NT tourism regions,⁶⁰ establishing the important role of product packaging and collaboration across the Territory's regions in supporting tourism outcomes.

Intra-Territory visitors average 2.7 nights per visit, while interstate and international visitors stay, on average, 6.5 and 12.0 nights respectively.⁶¹

More information about the region's visitor market can be found in Appendix F - Greater Darwin region visitor market.



Figure 4 - Visitor market profile

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

Visitor purpose, by visitor segment is shown in Figure 5. 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 in the region for a holiday, higher than the national average of 46% in 2019.⁶²

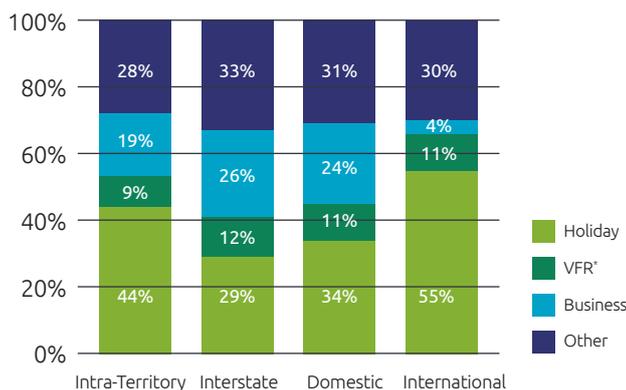


Figure 5 - Purpose of visit for travel to Greater Darwin region, 2019

Source: Tourism NT, Tourism NT Regional Profile: Darwin, 2019

*Visiting friends and relatives

Visitor feedback and perceptions

Tourism NT seeks feedback from visitors to the region and from potential visitors to understand challenges, issues, and opportunities for improvement. Tourism NT utilises this feedback to develop marketing for the region as well as to target industry development support. Tourism NT utilises a range of sources to collect feedback and market insights including ReviewPro software, satisfaction research, trade partners and Tourism Australia global consumer research.

ReviewPro

ReviewPro is a software platform for the tourism and hospitality industry to understand and improve visitor experiences. ReviewPro provides data collection tools and services such as guest satisfaction surveys, guest messaging hubs, and auto case management. ReviewPro's reputation management tool searches 175 online review sites such as Tripadvisor, Google, Booking.com, and Expedia to gather data from visitors' reviews of experiences such as hotels, attractions and restaurants. The tool conducts sentiment analysis to provide insights about guests' experiences.

ReviewPro benchmarks groups of hotels or operators through a Global Review Index (GRI). The data collected through ReviewPro can assist with the optimisation of pricing, setting quality objectives, or tracking performance over time. ReviewPro is utilised for tourism industry development in other states and jurisdictions in Australia, including Tourism and Events Queensland.

*Note: The domestic leisure drive market in this analysis includes car, motorcycle and campervan. Leisure includes both holiday and VFR travellers.

ReviewPro data analysis

NTG has utilised ReviewPro's reputation management tool to gather data about the Greater Darwin region.

In addition to the benchmarking provided by the Global Review Index (GRI), the tool includes online visitor feedback relating to service, location, room, value, cleanliness, entertainment and food and drink. ReviewPro breaks down online reviews into key categories relating to service, staff and value.

Reviews of hotels, tourist spots, and operators in the Greater Darwin region are mostly positive, with 73% of mentions rated as positive, and an overall GRI of 87%. This measure can be compared against the Tourism and Events Queensland (TEQ) benchmark for operators to be listed as a Best of Queensland experience at a GRI of 80.

The Greater Darwin region GRI rating reflects feedback relating to the top 20 establishments/places, including hotels, nature tours, adventure activities, museums and other tourism experiences, over the period from 2 Dec 2018 – 2 Dec 2019. Each individual business received a GRI, the lowest of which was 83% and the highest which was 99.5%. The total number of establishments considered in the GRI is notably lower than the number of establishments available in the region. A greater representation of establishments in the data collection process would enhance the tool's ability to support industry development.

There were 50,400 reviews during this timeframe, which was an increase of 27,100 from the previous year.

Two-fifths of the online review data collected from ReviewPro came from those travelling as a couple, (40%), with reviews from those travelling in a family group representing 23% and the balance split across those travelling alone (18%), travelling for business (11%) and in groups (7%).

In terms of online reputation, the ratings were:

- Global Review Index 87%
- service 86%
- location 90%
- room 83%
- value 82%
- cleanliness 86%.

Given very limited responses relating to entertainment and food and drink, ratings for these two categories are not presented.

Accommodation providers in the Greater Darwin region have GRIs ranging from 77% to 92%, confirming varied standards across the region.

Findings from the ReviewPro data analysis highlight the positive engagements between travellers and staff, and the opportunities to improve the visitor experience of value in the region. From the key review categories:

- service had a total of 3,177 references, being largely positive (72% of all references)
- staff had a total of 11,581 references, being predominantly positive (89% of all references)
- value had a total of 7,881 references, being somewhat positive (67% of all references).

A detailed discussion of the ReviewPro data insights is included at Appendix G.

Overall, reviews were positive, but staff and location received the highest share of positive reviews, with value being lowest.



*Jabiru over Mary River floodplains
Image: Tourism NT/Steve Strike*



Bamurru Plains Airboat tour
Image: Tourism NT/Shana McNaught

NT destination satisfaction research

Tourism NT undertook destination research from October 2018 to July 2019 to measure overall satisfaction and satisfaction with specific aspects of the visitor experience in the Territory's tourism regions.⁶³

A mean score of 5.8 for overall satisfaction (on a 7-point scale) was recorded for the Greater Darwin region, with interstate visitors giving their overall experience a higher satisfaction rating than international visitors.

When considering net extremely/very satisfied scores, the following satisfaction rates were recorded by visitor type:

- interstate visitor – 75%
- intra-Territory visitor – 67%
- international visitor – 62%

With regard to feedback on the region:

- visitors reported Litchfield National Park as a highlight of their stay
- reports on hotels varied, but was more positive than other regions in the NT
- many visitors staying at hotels were satisfied with their experience and some thought that their hotel stay was excellent value for money
- most visitors enjoyed their caravan park experience in the NT, except in Darwin where the caravan parks were considered to be located too far from the city centre and attractions
- food in Darwin and surrounds was comparatively better than other regions in NT
- food at Mindil Beach Sunset Markets was appreciated among visitors
- Darwin has many attractions compared to other parts of the NT
- the visitor experience at the RFDS site received high praise
- in general visitors on tour were satisfied with the friendly and knowledgeable guides
- it was identified that tour companies may benefit from taking note of people with dietary restrictions to better cater to their needs.

Overall, key findings for the NT included:

- the warmth and hospitality of the people visitors met on their journey was the best part of the visitor experience
- intra-territory visitors would like to see improvements regarding the variety of food and facilities available
- domestic visitors are much more likely to recommend the NT to others compared to international visitors; and
- the NT is considered to be attractive to someone who wants something out of the ordinary, is adventurous and who wants to learn new things.

When considering specific aspects of their visit in the NT, generally:

- for many, the quality of food exceeded expectations, but a lack of variety of fresh food and options catering to dietary restrictions was an issue
- there was a demand for more bush-tucker experiences
- most people are impressed with the natural beauty of NT Parks, regular maintenance is an important contributor to this experience

- most people want to experience authentic Aboriginal culture
- staff hospitality was appreciated across the NT
- most people loved their caravan park experience across the NT, except in Darwin due to its proximity to the city centre
- the cost of airfares to the NT is prohibitive to interstate visitation.

National operator and key local stakeholder feedback

A range of national operators and key local stakeholders were engaged to obtain feedback and insights on market demand and opportunities in the region and across the NT.

The feedback provided further perspectives obtained through workshops and interviews with local operators and stakeholders, allowing in some cases for comparisons across other jurisdictions or insights on opportunities for the region.

There was broad agreement around the region's strengths and comparative advantages, along with the gaps and opportunities identified.

Discussions pointed to a series of destination priorities for consideration in the years ahead as stakeholders in the region look to deliver on the Destination Management Plan. These include:

- prioritisation and investment in visitor experiences and complementary offerings to enable the region to develop as a year-round destination, including expansion of water activity offerings and solving access issues
- focus on establishing the region as a destination rather than a gateway, with increased connectivity across precincts within the region
- partnerships with operators and travel trade intermediaries which have a strong focus on the region (and the Territory)
- increased support for the development of Aboriginal tourism offerings in the region
- further investment in parks infrastructure to leverage the region's strength in providing nearby and accessible experiences in nature
- support for investment to increase the quality of accommodation offering in the region.

Many operators and stakeholders recognise that the interruptions resulting from COVID-19 have provided an opportunity for the region to reset its market mix and approach to seasonality, with many seeing the shifts in visitor preferences as beneficial for future growth.

Trade partner feedback and insights

In 2019, Tourism NT sought feedback from three key markets (US, Germany, and UK) to gain insights into challenges and opportunities for attracting international visitors to the Territory.

Key themes arising from the feedback included:

- flight accessibility and price
- travel planning
- destination awareness
- product offering.

Flights

Flight availability and cost were identified as barriers to attracting visitors from the US, German and UK markets. In the past decade, international airline capacity to the NT has declined, while other major Australian airports' capacity has increased, creating greater competition between Australian destinations. This was particularly evident in the UK market following the introduction of a direct flight from London to Perth. Significant disruptions to air travel following the pandemic may generate opportunities to reset flight patterns and increase access to the region.

The expense and availability of domestic flights is a barrier relative to other capital cities, but not as much as for other NT tourism regions, with Darwin the major gateway for the Territory. Flight arrival and departure times to Darwin were also identified as a discouraging factor.

Travel planning

Many visitors to Australia have limited time, and this has manifested in shorter lengths of stay. Some travellers are also extending layovers in other countries on their way to Australia, which is causing shorter stays in Australia. When visitors have limited time, it is understood that they typically avoid visiting the NT. Greater Darwin is not as affected by this barrier, as it is the major gateway to the NT, and less affected than other NT regions. Darwin is often seen as a destination for shorter trips relative to other regions of the NT, due to its ease of access.⁶⁴

Seasonality and the lack of access to certain areas of the region during wet weather are considered barriers to attracting visitors. 16% of international visitors come to Darwin during the March quarter, compared with 34% in the September quarter. Importantly Darwin's lower visitation period aligns with a key time when the British market travels overseas (November to April), suggesting enhanced support to plan travel during this time is important. However associated infrastructure and experience planning would be required to coincide with such efforts, given certain areas in the region, including prominent locations such as waterholes in Litchfield National Park, have limited access during wet weather.⁶⁵

Destination awareness

Compared to the well-known bucket list destination of the NT's Red Centre, the Top End of the Territory is lesser known around the world. Trade partners in Germany and the UK provide starter packages for working holidaymakers (WHMs) in cities around Australia, however Darwin starter packages are not offered by trade partners. As Darwin is the main port of entry for visitors to the region, it is visited by the majority (58%) of WHMs.⁶⁶ WHMs are an important source of labour for the mango harvest season, and this also contributes to the awareness of the region. However, WHM visitation to Greater Darwin decreased 39% from December 2014 to December 2019.⁶⁷

Darwin performs well when promoted in conjunction with natural attractions in the region. Darwin is a common stopover point for day trips to national parks such as Litchfield and Kakadu, or trips to see wildlife and landscapes.⁶⁸ A stopover in Darwin can also be combined with a trip on The Ghan.

Increased marketing sponsorship was noted as important for growing tourism in a competitive global market. It was considered that this is most effective when partnering with large, volume-producing partners.

Product offering

It was noted that though the Territory has made improvements in its product experiences and has developed Aboriginal tourism offerings, there is a view that the value for money is lower than in other destinations in Australia. New glamping facilities and



accommodation options in the Territory were noted as valuable enhancements, however some key destinations are still seen to lack product offerings. Other offerings such as rare species of flora, native wildlife and birds distinguish the region from other Australian locations. In the medium term, an increased diversity of offerings is needed to continue to attract visitors.⁶⁹

The price of tours and accommodation was highlighted as an issue for potential visitors, who believe they can get a similar experience elsewhere for less money.

Consumer demand analysis

The Consumer Demand Project (CDP) is run by Tourism Australia and includes insights from 11 international markets: Indonesia, New Zealand, Singapore, Malaysia, South Korea, Japan, China, India, Germany, USA and UK. The CDP focuses on key demand drivers, travel behaviours and preferences, purchase funnel and brand health metrics. The CDP was launched in 2012, with latest information available for 2019.⁷⁰

The CDP also focuses on high value travellers, which are travellers who:

- travel long haul, out of region, on a regular basis
- have considered or intend to travel to Australia
- consider food and wine, aquatic and coastal, and nature and wildlife as key drivers for their destination choice; and
- have above average trip expenditure, including likelihood to stay longer and disperse further.

When choosing a destination, the most important factor across the 11 markets was safety and security. The second most important factor overall, but the primary factor for the Korean,

Chinese, Indian, German and Indonesian markets was 'world class nature and wildlife'. Other top five factors were:

- a destination that offers value for money
- good food, wine, local cuisine and produce; and
- friendly and open citizens, local hospitality.

High value travellers had similar drivers as their top drivers, but with the addition of 'world class coastlines, beaches and marine wildlife'. For this market, 'world class nature and wildlife' is the most important factor.

Domestic travellers top five important factors in considering a destination are:

- 1 A safe and secure destination
- 2 A destination that offers value for money
- 3 World-class nature and wildlife
- 4 Rich history and heritage
- 5 Friendly and open citizens, local hospitality.

The survey confirms that Australia is most strongly associated with nature and history experiences.

When compared with attractions such as Kakadu and Uluru, Darwin city ranks relatively low on associations with:

- history and heritage; and
- nature and wildlife.

Of the select Australian destinations ranked for their association with these experiences, three destinations in the NT were included, being Kakadu, Uluru and Darwin. Of these, Kakadu and Uluru were ranked above Darwin for both association with nature and wildlife, and history and heritage. The results



Hideaway Litchfield accommodation
Image: Tourism NT/Jason Charles Hill

highlight an opportunity to build awareness of Darwin's unique natural and historical and heritage attractions, in addition to the need for the region to leverage its relationship with regions across the NT in the short to-medium term to maximise visitor value of these attractions.

Darwin has a Net Promoter Score (NPS) of 20 – similar to that of other capital cities. NPS considers how likely visitors are to recommend the destination.

Kakadu had the highest NPS of all Australian destinations, Uluru ranked third after Kangaroo Island. There's an opportunity for the region to leverage its proximity and relationship to other tourism regions in the NT which are highly attractive to visitors.

The consumer demand analysis also included a test of 20 Australian and 20 international experiences, with respondents viewing 4 randomly selected experiences from each offering. Experiences tested that related to the NT included Nitmiluk, *Bruce Munro: Tropical Light* in Darwin and The Ghan expedition rail journey.

While these experiences did not compare strongly in preference to international experiences, The Ghan expedition was the most preferred Australian experience in the NT ranking 6th of all Australian experiences. *Bruce Munro: Tropical Light* was ranked 15th of Australian experiences (from 20).

The most appealing features of the *Bruce Munro: Tropical Light* exhibition were:

- showcasing of Darwin's natural beauty, wildlife, friendly locals and sunsets
- waterfront dining experiences
- vibrant culinary scene in Darwin; and
- Darwin's laidback and street atmosphere.

Accessible tourism

Limited data is currently available to understand the profile of visitors to the NT travelling with accessibility needs. However, some indication of the potential market can be extrapolated through studies undertaken in Queensland and Victoria.

In Queensland, domestic travellers with a disability accounted for 8% (289,000) of the Queensland adult population. Considering the average travel party size for a visitor with a disability (2.3 people), and including children, the domestic accessible tourism market represented 13% of Queensland's total population (or, 657,000 people). Estimated spend for travel parties including a person with disability was \$1.9 billion, around 10% of total domestic spend in Queensland.

Similarly, travellers with a disability represented 7% (349,000) of Victoria's adult population, or 12% when considering related travel party (784,000 people). The estimated spend for travel parties including a person with disability was \$1.7 billion, 79% of which was overnight spend, accounting for 10% of total domestic spend in Victoria.⁷¹

Without a similar study in the NT, the current value of the market is unknown, yet with efforts to improve the region's accessibility and to target this market, it is not unreasonable to assume that the NT could also generate similar outcomes to the Queensland and Victorian markets.

Accessible tourism in the Greater Darwin region has added relevance to tourism industry development in the NT, due to its high levels of destination awareness relative to other tourism regions in the Territory, and prominence as an entry and exit destination.



Sunset over Darwin Harbour
Image: Tourism NT/Jules Ingall

Key findings

Visitor demand in the region is overwhelmingly driven by domestic visitors, with the majority of visitors arriving by air.

The data considered in the visitor market analysis highlights that strengths of the region include:

- the diversity, quality and quantity of experiences available in the region
- world class nature and wildlife
- hospitality and warmth of hosts in the NT
- availability of unique experiences e.g. Aboriginal tourism, The Ghan and Mindil Beach Sunset Markets.

Weakness and challenges for driving demand and visitation from the domestic and international visitor markets include:

- the high cost of flights and limited availability
- overcoming and readjusting the substantive reductions in flights into the region (as a result of the pandemic)
- decreasing levels of destination awareness as attraction of WHM diminishes, alongside shifts in destination prominence following travel restrictions associated with COVID-19;
- limited awareness and attractiveness of visitor experiences in the shoulder and low seasons.

The market insights highlight that opportunities to support increased visitation in the region include:

- promoting the region in conjunction with other regions and states
- promoting the region in conjunction with unique nearby nature experiences
- leveraging relatively high levels of destination awareness to enhance co-promotion outcomes
- maximising the value of association of the region as a unique destination stopover, to build overnight visitation
- the potential for enhanced marketing and product offerings to improve perceptions of value for money.

The Greater Darwin region is well-placed to leverage its well known and appreciated nature and wildlife offerings to continue to attract both the domestic and international travel markets, with both identifying 'world-class nature and wildlife' as a primary factor in choosing a travel destination.

Encouraging visitor engagement across the whole year will require ongoing investment and engagement with the domestic and international markets to build awareness of experiences and attractions across the whole year.

In addition, development of market pathways to enable access that supports such visitation, such as favourable flight times and ongoing availability will be an important factor in the success of this endeavour.



Appendix A

Product development opportunities

In consultations with stakeholders and through analysis of established plans for development across the Greater Darwin region the following product development opportunities have been identified to support sustainable tourism development in the region.

Region	Project	Product status	Impact on visitor demand	Ease of implementation	Total est. cost (\$M)
Darwin	Larrakia Cultural Centre	New	Max	High	40
Region wide	Expand the quantity and quality of Aboriginal cultural products in the region	Existing	Max	High	
Tiwi	Establish AFL exhibition matches to be hosted on Tiwi (including infrastructure to support)	New	High	Mod	
Tiwi	Aboriginal led fishing/hunting and bush foods tourism product	New	High	Mod	
Tiwi	Develop greenfield sites for tourism	New	High	High	
Region wide	Deliver infrastructure upgrades to regional and remote art centres/art trail commitments in the region	Existing	High	High	15

Region	Project	Product status	Impact on visitor demand	Ease of implementation	Total est. cost (\$M)
Darwin	New Darwin CBD sports stadium & entertainment precinct	New	Max	High	
Region wide	Develop adventure tourism in the region (4WD, long hikes, MTB trails, zip lining)	New	High	High	
Darwin	Establish a national sporting team for the NT and host local games	New	High	High	
Region wide	Hunting area development - expand options, improve access and upgrade facilities	Existing	Mod	High	15
Darwin	Development of cycle paths (Muirhead to Lee Point, Howard Springs to Berry Springs, Mandorah beach)	New	Low	Low	4
Region wide	Enhance recreational fishing infrastructure across the Territory	Existing	Limited	Mod	33

Region	Project	Product status	Impact on visitor demand	Ease of implementation	Total est. cost (\$M)
Darwin	Development of local food and beverage experiences	New	Max	High	40
Region wide	MAGNT upgrades, expansion and development	Existing	Max	High	
Darwin	Upgrade & trail development for Darwin WWII product e.g. tunnels at East Point Reserve, oil tanks, etc.	New	High	Mod	
Region wide	Stuart Highway WWII and pastoral history and cultural journey experience	New	High	Mod	
Darwin	Northern Australian rail trail - cultural and heritage sites between Adelaide River, Batchelor and Snake Creek	New	High	High	
Region wide	Create an interactive facility showcasing Darwin's pioneer history	Existing	High	High	15

Region	Project	Product status	Impact on visitor demand	Ease of implementation	Total est. cost (\$M)
Region wide	Upgrade of telecommunication services	Existing	High	High	58
Darwin	Education and community precinct - New CDU campus in Darwin CBD	New	High	High	225
Region wide	Event infrastructure to increase and/or revitalise regional events including night time experiences	Existing	Mod	Mod	10
Wagait	Mandorah – new marine facility	Existing	Mod	Mod	50
Region wide	Establish electric vehicle charging infrastructure	New	Mod	Mod	
Region wide	Signage and wayfinding solutions	Existing	Mod	High	
Darwin	NT Rugby Union facility upgrade	Existing	Low	Low	
Darwin	TIO stadium upgrade	Existing	Low	Low	
Darwin	Upgrade heavy – rigid vehicle transit centre in CBD	Existing	Low	Low	
Coomalie	Batchelor town centre revitalisation: recreation hub and facilities and lighting	Existing	Low	Mod	5
Region wide	Upgrades to tourism roads	Existing	Low	Mod	
Darwin	Public transport solutions	Existing	Low	Mod	
Unincorporated	Cox Peninsula Road - intersection upgrade	Existing	Limited	Low	3

Region	Project	Product status	Impact on visitor demand	Ease of implementation	Total est. cost (\$M)
Unincorporated	Litchfield National Park: Central Valley project development and upgrades to existing sites	New	Max	Low	
Unincorporated	Litchfield National Park: Establish accommodation resort in Litchfield National Park	New	Max	Low	
Darwin	Sunset strip development activating the Darwin Harbour area from East Point through to Cullen Bay	Existing	High	Low	8
Darwin	Mindil Beach activation, upgrades and connectivity enhancements	Existing	Mod	Low	8
Darwin	George Brown Darwin Botanic Gardens: display house, wetland, boardwalk, service infrastructure upgrades	Existing	Mod	Low	19
Litchfield	Berry Springs Nature Park upgrades	Existing	Mod	Max	
Darwin	Nightcliff Beach redevelopment: lighting, amenity and community facility improvements	Existing	Mod	Low	8
Litchfield	Howard Springs Nature Park - new rangers office, exhibit area, kiosk and picnic facilities	Existing	Mod	Low	6
Litchfield	Fogg Dam Reserve Upgrades	Existing	Mod	Low	
Region wide	Park facilities - enhance experience and access for visitors with limited mobility	Existing	Mod	Mod	9
Unincorporated	Mary River National Park development: campgrounds, 4WD tracks	Existing	Mod	Mod	4
Region wide	Enhancements to NT Government assets - Parks and Wildlife	Existing	Mod	Mod	100
Darwin	Lake Alexander upgrade: access, playground, lighting	Existing	Low	Low	7
Darwin	Casuarina Coastal Reserve: Dripstone Cliffs & Rapid Creek site upgrades to signage and recreational facilities	Existing	Low	Low	11

Region	Project	Product status	Impact on visitor demand	Ease of implementation	Total est. cost (\$M)
Darwin	Darwin Waterfront redevelopment	Existing	Max	High	
Darwin	Darwin CBD revitalisation: Civic and State Square masterplan implementation	New	Max	High	200
Darwin	State Square Art Gallery	New	Max	High	Ibid
Darwin	Darwin International Airport resort development	New	Max	High	20
Darwin	Frances Bay Marina precinct development	Existing	Max	High	20
Darwin	Expand berthing capacity at Fort Hill Wharf and/or investigate possible redevelopment of Stokes Hill Wharf	Existing	Mod	Low	
Darwin	Cullen Bay revitalisation	Existing	High	Max	
Darwin	Little Mindil Resort	New	High	Mod	200
Darwin	Waterfront Precinct - new luxury hotel	New	High	Mod	200
Darwin	The Escarpment – luxury hotel	New	High	Mod	120
Darwin	Increase capacity for the Darwin cruise terminal and progress wharf upgrades	Existing	High	Mod	
Darwin	Lameroo development (boardwalk, swimming, play, food)	New	High	Mod	140
Darwin	Darwin Passenger Rail Terminal & city spur	New	High	High	
Darwin	RV motor home park	New	Mod	Mod	
Darwin	Darwin city loop service	New	Mod	Mod	
Darwin	Super Yacht mooring facility	New	Mod	Mod	
Litchfield	Territory Wildlife Park - critical infrastructure upgrade	Existing	Low	Low	3
Darwin	Fannie Bay Gaol visitor centre	Existing	Low	Low	
Wagait	Mandorah camping and hotel developments	Existing	Low	Low	
Darwin	Darwin International Airport master plan	Existing	Low	Low	
Coomalie	Batchelor Airport upgrade	Existing	Low	Mod	18

Source: NT DIPL infrastructure Priority List 2021; Deloitte

Legend

Nature-based offerings
Aboriginal cultural product
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



Appendix B

Socio-economic profile

Regional Profile

Population and land area for the Greater Darwin region are shown by LGA in *Table 6*.

Table 6 - Greater Darwin region profile

LGA	Land area km ²	Population
City of Darwin	112	82,030
City of Palmerston	56	39,032
Litchfield Council	2,900	25,566
Coomalie Community Government Council	2,000	1,356
Tiwi Islands Regional Council	7,500	2,743
Unincorporated NT LGA	20,000	7,421
Wagait Shire LGA	6	524
Total	32,574	158,672

Source: *Profile id*

Tourism industry

Of those employed in the tourism industry⁷², most common sectors were hospitality and retail:

- cafes, restaurants, and takeaway food services (24%)
- retail trade (16%)
- air, water and other transport (11%)
- accommodation (10%)
- road transport and transport equipment rental (10%).

Other tourism industries in the region were clubs, pubs, taverns and bars; rail transport; road transport and transport equipment rental; travel agency and tour operator services; cultural services; casinos and other gambling services; other sports and recreation services; and education and training.⁷³

Population profile

In 2020 the estimated resident population for the Greater Darwin region was 151,251. Between 2017 and 2020, the region's population decreased by 1,842 people, or -1.2%, or an annual population change of 0.3% across the period.⁷⁴

According to the 2016 Census, the region has a young population, with a median age of 33, similar to the NT median age of 32 – considerably younger than the Australian median age of 38. Over half (52%) of the region's population is under the age of 35. The region's population is comprised of persons identifying their heritage as Australian (25%), English (22%) and Aboriginal (9%).⁷⁵

Education

Overall, educational attainment in the Greater Darwin region is higher than in the Territory. Of people aged 15 and over, 51% have finished year 12 or higher, compared to 44% in the NT.

In the region, 20% of people hold a bachelor's degree or higher, 8% hold a diploma or advanced diploma, and 22% hold a vocational qualification, compared to 17%, 7%, and 20% in the Territory, respectively.⁷⁶

Labour force

Along with the decrease in population from 2017 to 2020, the size of the labour force also decreased from 93,437⁷⁷ to 88,560. However, employment outcomes are comparatively positive, with 4.6% of the labour force in the region being unemployed, compared to 7.0% for the NT, and 6.9% for Australia as a whole.

Income

Weekly household income in Greater Darwin⁷⁸ (used as a reference point for the region) is higher than the NT overall, as indicated in *Figure 6*.

In 2016, 35% of households in Greater Darwin earned \$2,500 or more weekly, compared to 29% of households in the Territory.⁷⁹



Figure 6 - Weekly household income, 2016

Source: Profile.id, Greater Darwin: Household Income

Greater Darwin
Northern Territory

Economic profile

The Greater Darwin region had GRP of \$18.6 billion in the year ending June 2020, a 10.5% increase between 2018 and 2020.⁸⁰ A breakdown of GRP by LGA is shown in *Table 7*.

Table 6 - Greater Darwin region profile

Greater Darwin Region LGA	2020	2019	2018	Variation (FY18 to 20)
(Billions \$)				
City of Darwin LGA	9.28	9.4	9.51	-2.4%
City of Palmerston LGA	1.73	1.74	1.72	0.6%
Litchfield Council LGA	7.45	6.19	5.47	36.2%
Coomalie Community Government Council LGA	0.1	0.11	0.098	2.0%
Tiwi Islands Regional Council LGA	0.06	0.063	0.064	-6.3%
Wagait Shire LGA	0.02	0.015	0.013	53.9%
Total	18.64	17.518	16.875	10.5%

Employment

Public administration and safety is the largest employing industry in the region, providing 13,270 jobs in 2016, accounting for 19% of employment, a decrease of 343 jobs since 2011. The construction industry is the second largest employer, accounting for 12% of employment, followed by health care and social assistance, accounting for 9% of jobs.

These three industries comprise 40% of employment in the region. Emerging industries between 2011 and 2016 included construction, which added 2,803 workers, and professional, scientific and technical services which added 1,105 workers.⁸¹

Mining in the region generated \$5.2 billion in 2019-20, accounting for 32% of total value added, while public administration and safety (also the top employing industry in the NT) accounted for \$2.2 billion (or 14%) in value added. The health care and social assistance and construction industries accounted for a further \$1.2 billion and \$1 billion respectively.⁸²

In 2020, there were 10,975 businesses registered in the Greater Darwin region, 19.6% of which were in construction. Other industries with a high proportion of businesses in the region included:

- retail, hiring and real estate services (12.7%)
- professional, scientific and technical services (10.5%)
- transport, postal and warehousing (9.5%)
- financial and insurance services (6.6%)
- health care and social assistance (5.9%).⁸³



Appendix C

Key destination descriptions

Multiple destinations make up the Greater Darwin region. A description of these destinations and the prominent visitor experiences available in each destination is described in this section.

Darwin

The Darwin region is the area that starts from Darwin City, surrounding urban district and extends south along the Stuart Highway to Noonamah. The Larrakia people are the Traditional Owners of the Darwin region.

Darwin is the capital city of the Northern Territory and is known for its tropical climate and colourful characters, unique experiences and accessibility to world-class nature and cultural offerings.

Darwin provides multiple accommodation options ranging from low-cost to more luxurious options. A wide range of food and drink choices are available in Darwin, incorporating hotel meals, market food and more formal dining.

Visitor experiences in Darwin are diverse, including history and heritage; lifestyle; adventure; wildlife and nature; and culture.

Casuarina Coastal Reserve

The Casuarina Coastal Reserve is a protected area in the northern area of Darwin. The 1500-hectare reserve is popular for its white sandy beaches, shaded picnic areas, creeks, cycle paths, mountain bike tracks and wildlife.

Charles Darwin National Park

Charles Darwin National Park is situated in Frances Bay to the east of Darwin CBD. The park has national significance for its ecological diversity and Aboriginal and World War II history and protects part of the Port of Darwin wetland.

George Brown Darwin Botanic Gardens

The Botanic gardens border the Darwin CBD and along with tropical plant collections contains a visitor and event centre and café.⁸⁴

Darwin CBD

Darwin Central Business District is referred to as the Darwin city centre and it offers a variety of food, accommodation, and entertainment options. Darwin CBD is also home to many monumental landmarks such as Brown's Mart, a historic sandstone building built in 1883 and the Darwin Entertainment Centre that hosts many events and theatrical performances.⁸⁵ Other famous landmarks in Darwin CBD include the Bicentennial Park, Crocosaurus Cove, and Darwin's original Chinatown, Cavanagh Street.

Darwin Waterfront

A showcase of Darwin's CBD, the Waterfront is a lifestyle destination with lush parklands, a man-made beach with saltwater recreation lagoon, wave pool, alongside a range of food, retail and accommodation options.

The Waterfront connects to Stokes Hill Wharf and the Darwin Harbour. The Darwin Harbour has experiences including fishing, sailing, harbour cruising and jet ski adventures.⁸⁶ Stokes Hill Wharf is home to the Royal Flying Doctor Service Darwin Tourist Facility, providing an interactive Bombing of Darwin experience, along with food and beverage services.⁸⁷ Adjacent to the Waterfront precinct is the Deckchair Cinema ideally located to maximise its waterfront location.

East Point

East Point is located 6.7km from Darwin and is rich in biodiversity and history. East Point is also home to East Point Reserve, one of the largest reserves in the Darwin municipality with green space and recreation spaces spanning 200 hectares.⁸⁸ Other recreational facilities offered include two playgrounds, walking trails, exercise stations and a lake. The Darwin Military Museum is also located at East Point, adjacent to the Defence of Darwin Experience. The Museum is within a heritage listed area that contains World War II fortifications, and a collection of artefacts from conflicts where Australian troops were deployed.

Fannie Bay

Fannie Bay is an area 4km from Darwin, host to the Fannie Bay Gaol Museum,⁸⁹ a site of historic significance, the Fannie Bay Racecourse where prestigious horse racing events such as the Darwin Cup are held,⁹⁰ and the Fannie Bay foreshore⁹¹. It also offers a range of food and beverage services, boutique shops and outdoor experiences.

Holmes Jungle Nature Park

Holmes Jungle Nature Park protects an isolated pocket of monsoon vine thicket and is nestled on the fringes of Darwin's northern suburbs. It is home to a large number of birds, mammals, and reptiles.

Mindil Beach

Mindil Beach is a Darwin landmark, known best for the sunset market which host a range of food, arts and crafts stalls – coinciding with the setting of the sun over the water.⁹²

Palmerston

Palmerston is a large regional centre south of Darwin, it offers retail, accommodation and experiences including a golf course, water park and dining.

City of Palmerston

The City of Palmerston is located 30km south-east of Darwin and is the youngest city in Northern Territory.⁹³ Visitors can enjoy the many social clubs, restaurants or pubs. The area includes Marlow Lagoon, a park that spans three hectares with picnic and barbeque facilities.⁹⁴

Litchfield

Bounded by Van Diemen Gulf and the Timor Sea in the north, the Adelaide River in the east and Coomalie area in the south, Litchfield is a broad rural area known for its parks, rivers and wildlife.

Berry Springs

Berry Springs is a small town that is the northern gateway to the spectacular waterfalls of Litchfield National Park and the eastern gateway to Dundee Beach, Wagait Beach and Mandorah.

Both the Berry Springs Nature Park and Territory Wildlife Park are located at Berry Springs. Visitors can enjoy a range of accommodation and eateries, along with outdoor experiences including fishing, wildlife watching, bird watching and swimming.

Blackmore River Conservation Reserve

The Blackmore River Conservation Reserve is a location for boating and fishing, with accommodation and experiences available at Tumbling Waters Holiday Park, situated at the entrance of the Reserve.

Fogg Dam Conversation Reserve

The Fogg Dam Conversation Reserve is a wetland area with one of the world's highest biomass of predator to prey ratio - offering unique wildlife watching experiences, notably for birds and snakes.⁹⁵

Gunn Point

At Gunn Point Peninsula visitors can enjoy beach walks, camping, fishing, and boating – enabled by the Saltwater Arm boat ramp.

Harrison Dam Conservation Area

Harrison Dam Conservation Area is where visitors can access the jumping crocodile cruises on the Adelaide River.

Howard Springs Nature Park

The National Park is located on Gunn Point Road about 30km south of Darwin. The park offers recreation for residents and visitors, being used for leisure since World War II. The park hosts a range of wildlife including turtles, barramundi, file snakes, and freshwater fish species.

Humpty Doo

Humpty Doo is a small town that is a popular stopover point for tourists and visitors travelling between Darwin and Kakadu national Park. It is well-known for agriculture produce such as mangoes.⁹⁶ Humpty Doo also offers shopping and dining experiences.

Noonamah

Noonamah is a rural town offering outback hospitality, regular rodeo experiences and World War II sites for travellers on the Stuart Highway.

Tree Point Conservation Area

Located at the northern coastline off the Gunn Point Road. It is a location for fishing, boating, wildlife watching, and birdwatching beach walks, picnics and enjoying the scenery of Darwin's northern beaches.⁹⁷

Tiwi Islands

The Tiwi Islands is home to the Tiwi people, who have occupied the islands for approximately 11,000 years.⁹⁸ Located 80 kilometres north of Darwin, comprising of Bathurst and Melville Islands, and known collectively as the Tiwi Islands.

The Tiwi Islands is a unique destination offering Aboriginal culture and art, fishing, sporting and coastal landscape experiences.

Bathurst Island

Wurruyiyanga is the largest community on the Tiwi Islands and sits on the south-east coast of Bathurst Island. This is location for the SeaLink ferry between Tiwi and Darwin. Major attractions at Wurruyiyanga include Tiwi Designs, Bima Wear, Ngaruwanajirri, the Patakijiyali Museum, and the old Church precinct. Recommended experiences on the island include the Tiwi Islands Football Grand Final and Art Sale, held annually in March.⁹⁹

Melville Island

Milikapiti and Pirlangimpi are two community centres on Melville Island, there are art centres at each community, being Jilamara Arts and Crafts Association and Munupi Arts and Craft Association, respectively. Both communities are accessible to visitors by air.

Unincorporated NT

Bynoe

Bynoe Harbour is located to the south of Darwin Harbour, separated by the Cox Peninsula. Offering clear waters, mangrove coastlines and sandy beaches, Bynoe offers a pristine environment for fishing and a rich habitat of marine life. Crab Claw Island Resort provides a range of accommodation options for visitors and leisure experiences.¹⁰⁰

Djukbinj National Park

The Djukbinj National Park is situated on the Arnhem Highway. It offers a scenic drive through a floodplain network of billabongs. Wildlife watching, photography, and culture are key experiences for visitors.

Dundee Beach

Is a relaxed coastal town and popular fishing location, known for the best bluewater fishing easily accessed from Darwin. Located on the shores of Fog Bay, recommended visitor experiences include boating, camping, fishing and walks. Accommodation, food and beverage services are available at Dundee Lodge and Holiday Park.

Finniss River

Located south of Bynoe, Finniss River is known for its vast floodplains, salt and freshwater rivers, and fishing. The newly established resort provides luxury lodge accommodation options and experiences for visitors on Finniss River Station.¹⁰¹

Litchfield National Park

Litchfield National Park features stunning tropical natural environments including rugged sandstone escarpments, perennial spring-fed streams, monsoon rainforest, magnetic termite mounds, waterfalls and historic ruins.¹⁰²

The Park is known for crystal-clear swimming holes, and pleasant bushwalking trails. With camping locations, hiking trails and 4 wheel drive tracks, there are several options for adventure tourism in the Park.

A number of tour operators provide visitor access and experiences in the Park.

Mary River National Park

Mary River National Park is known for its world-class barramundi fishing, which are plentiful in the Mary River wetlands. A number of lodges offer accommodation in and near the Park, as well as tours and adventure experiences. Due to the abundant wetlands, visitors can enjoy boating, fishing, birdwatching and wildlife experiences in the Park.¹⁰³

Wagait Shire

Wagait Shire is a quiet beach community situated 8km west of Darwin by boat. It lies on the north coast of the Cox Peninsula.

Wagait Beach

Accessible by 15-minute ferry from Darwin, or a longer road trip via the Cox Peninsula. Wagait Beach offers a tropical lifestyle with pristine coastline, green forest walks, fishing, WWII heritage sites, and a friendly open-air bar at the Country Cox Club. Attractions include the Cox Country Club which is home to the Mandorah

Ukulele Folk Music Festival. Accommodation is typically available in the form of holiday homes. Other visitor experiences include birdwatching, fishing, hiking, mountain biking, scenic drives and walks.¹⁰⁴

Mandorah

Mandorah is situated on the Cox Peninsula, west of Darwin Harbour. It is a location for outdoor activities such as fishing at the Mandorah ferry jetty and wildlife viewing. Other offerings include organised tours to view the termite mounds and the WWII war heritage site.¹⁰⁵

Coomalie

With an area covering 2056km² and a population of 1319, the Coomalie region starts 75km south of Darwin and ends south of the Adelaide River township; encompassing the townships of Batchelor and Adelaide River. The Awarai (Warai) and Kungarakan people are the Traditional Owners of this land.

Adelaide River

The Adelaide River refers to both a township and the river. The town is situated between Darwin and Katherine on the Stuart Highway, revered for the Adelaide River War Cemetery honouring the deaths of servicemen and civilians. The Adelaide River, crossing the Arnhem Highway and flowing towards Kakadu National Park, is renowned for its jumping crocodile cruises.¹⁰⁶

Batchelor region

The Batchelor region, incorporating the town of Batchelor, is also known as the gateway to Litchfield National Park. The region offers multiple accommodation options along with World War II and cultural visitor experiences to complement the world-class natural attraction of Litchfield National Park.



*Adventure tourism in Litchfield National Park
Image: Tourism NT/Sean Scott*



Appendix D

Tourism development planning

Destination management planning involves alignment and collaboration across public and private sectors, and the community. It engages stakeholders from not only the tourism sector, but also from other sectors that support and contribute to the overall experience of a destination. The Destination Management Plan for the Greater Darwin region works to further enhance and facilitate collaborative action in the region to enrich and provide positive tourism outcomes.

Tourism industry development

NT's Tourism Industry Strategy 2030

Tourism NT, in partnership with Deloitte, developed the *NT Tourism Industry Strategy 2030* to guide tourism development and direction across the Territory over the next decade. The Strategy involved government and industry working together, and identified six priority objectives:

- grow investment in the Northern Territory's remarkable assets, product, and regions
- strengthen and showcase the Northern Territory's distinctive Aboriginal cultural tourism experiences
- grow the value of the holiday market in the Northern Territory through strategic marketing activities
- leverage and build events to drive visitation
- develop ongoing access to and within the Northern Territory
- increase recognition of the value of tourism to the Northern Territory.

Four pillars underpin the actions identified across each priority objective to ensure the Strategy's success:

- marketing
- industry development
- workforce development
- collaboration across industry and government.

The NT Government's Department of Industry, Tourism and Trade is responsible for ensuring the Strategy remains relevant through to 2030. In particular, the ongoing reporting and review mechanisms to support the successful delivery include an annual report card, three yearly reviews and a flexible target range.

The key objective of the Strategy is for tourism in the Territory to achieve sustainable and inclusive growth across the industry and throughout the regions, sub-sectors and markets.

Northern Territory Aboriginal Tourism Strategy 2020-2030

Tourism NT in alliance with the NT Aboriginal Tourism Advisory Council (ATAC) developed the *Northern Territory Aboriginal Tourism Strategy 2020-2030*. The objective of the Strategy is to guide the development of Aboriginal cultural tourism in the NT over the next 10 years to deliver on the vision to be the undeniable leader in the Aboriginal tourism sector.

The Strategy sets out the approach for developing the Aboriginal tourism sector in the NT through a focus on establishing five key pillars including:

- 1 Living cultures** – respectfully sharing Aboriginal cultures with others will foster improved understanding and promote Aboriginal cultures for future generations
- 2 Living communities** – strengthening knowledge and understanding in Aboriginal people and across networks
- 3 Living lives** – nurturing skills and developing support tools to create better business, job and industry success
- 4 Living landscapes** – providing better access and services to destinations by developing improved infrastructure with partners; and
- 5 Living interactions** – providing better communication, engagement and monitoring connections with visitors and industry will strengthen the sector.

To support the successful delivery of the Strategy, the NT Government's Department of Industry, Tourism and Trade is responsible for the annual report card and three yearly reviews through to 2030.

Northern Territory Drive Tourism Strategy 2021-2030

Tourism NT commissioned the *Northern Territory Drive Tourism Strategy 2021-2030* as part of a suite of actions from the *NT's Tourism Industry Strategy 2030*, which identified a need to prioritise and advocate for investment in key drive routes in the NT. Drive visitation is an important market for the NT tourism industry, accounting for approximately 40% of all visitation to the NT.¹⁰⁷

The Strategy considers self-drive leisure visitors and all-purpose visitors using a self-drive vehicle and spending at least one night at a Territory destination.

The Strategy focuses on four key areas, including:

- attracting new markets to increase visitation
- improving visitor experience to increase length of stay
- increasing regional dispersal to improve tourism outcomes in regional areas
- enhancing brand reputation.

Key opportunities identified in the Strategy which are relevant to the Greater Darwin DMP include:

- opportunities for new investment in roads in and around Kakadu National Park, especially to enhance access through the tropical summer
- safety improvements to existing infrastructure, such as overtaking lanes
- enhance marketing of the Explorers Way (route between Darwin and Adelaide) and the Savannah Way (route across northern Australia which has a connecting road to Darwin)
- delivery on priority road projects in Kakadu National Park
- consideration of tourism benefits when assessing and planning new road infrastructure
- modernisation of camping and RV grounds
- working with Land Councils and Traditional Owners to develop tourism opportunities along key drive routes.

Cruise Tourism Strategy 2020-2025

Tourism NT developed the *Cruise Tourism Strategy 2020 – 2025* in partnership with a range of stakeholders across the cruise sector, government, industry and community.

The *Cruise Tourism Strategy 2020 – 2025* is highly relevant to the Greater Darwin DMP, given the region's port infrastructure and favourable connectivity to cruise patterns in south-east Asia and northern Australia.

The Strategy considers opportunities to grow the sector in the NT, identify enabling activities to drive cruise visitation outcomes, and to proactively support the development and growth of the NT cruise industry.

The Strategy identifies four pillars to achieve sector growth, including:

- driving cruise ship attraction to increase the number of ships visiting Darwin
- developing the quantity and quality of onshore experiences to drive visitation and enhance cruise visitor satisfaction
- ensuring cruise ship infrastructure and operational support services are appropriate and meet the needs of current and future customers; and
- enhanced communication and collaboration to facilitate coordinated and strategic approaches to sector growth and development.

The Strategy considers the impact of the COVID-19 pandemic and recognises a phased sector development pathway will need to be considered as travel restrictions are eased for both domestic and international travellers.

NT Parks Masterplan

The NT Government is currently in the process of developing a new *NT Parks Masterplan 2022–2052*. The aim of the Plan is to establish a clear vision for the Territory's Parks and reserves over the next 30 years. Investment in the Plan denotes the significance of conserving and planning how residents and visitors can experience the natural landscapes and cultural values of the Parks over multiple generations. The Plan will set out directions for the future development and management of recreation opportunities in Parks going forward, including prioritisation of capital works and maintenance programs.

Early consultation on the Plan recognises that effective management of the NT's Parks will involve balancing multiple interests, including visitor experiences, Aboriginal rights and interests and biodiversity. Following release of an initial consultation paper in 2021, a draft plan will be released for comment in 2022 before finalisation.¹⁰⁸

Tourism infrastructure

The Department of Infrastructure, Planning and Logistics (DIPL) plays a key role in tourism development within the region. The Department brings together the key functions that drive land use, infrastructure, and transport. DIPL's *10-Year Infrastructure Plan 2019-2028* (the Plan) lists a number of publicly and privately funded projects that will have a positive impact on tourism in the region.

The infrastructure developments identified in the Plan include:

- Litchfield National Park – accommodation expansion
- back country hunting – access and infrastructure improvement
- Fogg Dam Conservation Reserve – bird watching developments
- development of a rail trail tourist attraction along the old Northern Australia Railway
- Tiwi Island waterfront and parkland beautification
- Darwin River Tavern extension
- Darwin CBD revitalisation – Greening and cooling initiatives, State Square underground car park, laneway activation, State Square Art Gallery and master plan, and the CDU campus
- Darwin CBD accommodation – 24 storey development on Daly Street
- Buffalo Creek – road and boat ramp improvements
- Shoal Bay Hunting Reserve – access improvements
- Larrakia Cultural Centre development; and
- Darwin International Airport master plan

Note: While not listed here, it is acknowledged that there are a number of tourism projects across other tourism regions in the Territory which will attract visitors to the Territory resulting in a benefit to the Greater Darwin tourism region. Examples include the revitalisation of Jabiru and Kakadu, and the development of a National Aboriginal Art Gallery in Alice Springs.

Infrastructure projects that are already providing a positive impact on tourism within the region include:

- Bagot Road entry statement and landscaping
- Darwin International Airport – security enhancements
- Darwin CBD Revitalisation – Greening and cooling initiatives, State Square underground car park, laneway activation, State Square Art Gallery and Masterplan, and the CDU campus
- Cullen Bay revitalisation
- George Brown Darwin Botanic Gardens developments
- Waterfront Precinct – Skywalk to the Esplanade; and
- Litchfield National Park – Central Valley stage 1, East Reynolds visitor experience upgrades and adventure hub

These projects specifically aim to improve amenities for the community and visitors, in turn increasing visitor numbers and lengthening stays within the region. Importantly, the projects directly benefit tourism within the Greater Darwin region, while also providing further opportunity for growth in the market.

Darwin City Deal

The Darwin City Deal aims to position Darwin as a vibrant and liveable city, enabled by a growing population and diversified economy. The plan will be delivered over a 10-year horizon, through a partnership with the Commonwealth Government, NT Government, and the City of Darwin. A number of stakeholders including Charles Darwin University, Larrakia people, industry and community are recognised as central to the success of the plan.

A number of commitments have been established in the plan, including:

- development of an iconic new education and civic precinct in Darwin CBD
- upgrade and revitalisation of the Darwin State Square
- development of a new art gallery at State Square
- cooling and greening initiatives across the City
- activation of the harbour foreshore and redevelopment of Stokes Hill and Frances Bay
- establishment of the Larrakia Cultural Centre
- advancement of Darwin's digital capacity through the Switching on Darwin project
- development of a Darwin City activation and promotion entity and guiding strategy
- development of a marine industry park at East Arm
- coordinated planning and development of the city's precincts and public spaces under the deal; and
- workforce development initiatives and support.

The Darwin City Deal will facilitate a number of projects that will significantly advance Darwin's recognition as an attractive visitor destination, while supporting the development of high-quality tourism experiences, enabling infrastructure, and the social and economic foundations to sustainably develop the capacity of the region to build and prosper.

Park management plans

The management and joint management of Parks in the region play a pivotal role in visitor experience. Management plans outline the priorities of stakeholders within the region, while providing a way to handle the complexities of balancing growth in the tourism industry and preserving stakeholders values.

A range of joint management plans across the region highlight the importance of Traditional Owners in park management processes, ensuring they can protect the interests of future generations while providing opportunities for the present day.

In close alignment with these values, the management objectives across the plans focus on:

- ensuring the health, integrity and condition of the natural environment is not only protected, but improved
- maintaining existing, and introducing new recreational activities and experiences
- interpreting and protecting significant cultural and historical sites
- ensuring the conservation of significant archaeological sites and maintaining Indigenous connection to country
- achieving equitable joint management partnerships

Management Plans

Management plans have been considered for Charles Darwin National Park and Howard Springs Nature Park.

Charles Darwin National Park

The key focus areas of the Charles Darwin National Park management plan include:

- Conservation of the Park's natural values
- Providing a natural area within close proximity to Darwin city for recreational activities
- Preserving the historical values of the Park
- Preserving sites of Aboriginal significance
- Providing visitors the opportunity to learn from the Park's cultural and historically significant sites

The vision of the Charles Darwin National Park is to provide a destination where visitors and local residents are able to enjoy low-key activities in natural surroundings, and offer insights as to natural and cultural history, and gain the values of the site.

Guiding principles of the plan include:

- offering a range of recreational opportunities
- providing appropriate facilities and access to a range of Park settings to effectively disperse visitors, minimise environmental impacts and potential conflicts between user groups
- developing an information and interpretation service to enhance visitors' enjoyment of the park, promote appreciation of the park's natural and cultural principles, and visitor behaviour consistent with those values; and
- ensuring the safety of visitors, staff and the protection of the park assets.

Priority experiences identified for the Park include recreational fishing / crabbing, walking, cycling, bird watching and picnicking.¹⁰⁹

Howard Springs Nature Park

The priorities of the Howard Springs Nature Park Management Plan focus on visitor experience and community engagement:

- realising the potential for new recreation activities through development of infrastructure
- promoting strong public involvement in the park management
- protecting the natural environment through targeted fire and weed management.

The vision of the Howard Springs Nature Park is to be an iconic tourism and family destination offering high quality nature-based experiences, providing enjoyment for visitors and locals in a natural setting.

Guiding principles for the plan include:

- collaboration with the NT tourism sector for commercial development and environmental protection
- creating a sense of arrival
- implementation of landscape master plan
- providing immersive and exciting experiences
- aligning with the DEPWS visitor monitoring program
- building positive economic and social impacts.

Priority experiences identified for the Park include viewing wildlife, walking, cycling, picnicking, bird watching and offering a cooling respite environment.¹¹⁰

Visitor experience plans

Visitor experience plans (VEPs) have been developed for Litchfield National Park, Casuarina Coastal Reserve and George Brown Botanical Gardens. The visitor experience plans aim to guide the enhancement of NT Park's visitor experience offerings. The development of VEPs highlight the significance of these assets for the region.

Litchfield National Park

The Litchfield National Park Management Plan details a wide range of desired outcomes including:

- enhancing visitor experience through development in facilities and amenities
- providing a range of additional park destinations to increase visitor attraction and mitigate overcrowding
- introducing new recreational adventure activities and luxury nature-based accommodation
- ensuring visitor safety through fire, weed and feral animal management programs
- protecting the outstanding natural resources of the park; and
- preserving the significant Aboriginal and historical resources or the region.

The vision of the Litchfield National Park is to be the Top End's leading National Park that:

- protects and conserves outstanding natural values
- is loved by the community and visitors for its great nature and culture-based recreational experiences and wellbeing benefits
- contributes enormously to the Territory's economy; and
- is valued for its cultural heritage.

Guiding principles for the Plan include:

- respecting Aboriginal cultural experiences and interpretation within the Park
- aligning with strategic plans
- targeting the market audience
- implementation of crocodile management plan
- aligning with the DEPWS visitor monitoring program
- creating a sense of arrival
- environmental conservation; and
- building positive economic and social impacts.

Priority experiences identified for the Park include:

- recreational fishing
- viewing wildlife
- four-wheel driving
- swimming
- walking
- cycling/mountain biking
- camping
- picnicking
- cooling down.¹¹¹

Casuarina Coastal Reserve

The priorities of the Casuarina Coastal Reserve management plan include:

- enhancing visitor experience through improvement and development of facilities
- increasing community involvement in the management process
- protecting the Reserve's key natural values; and
- ensuring the protection of significant cultural sites in the Reserve.

The vision for the Casuarina Coastal Reserve is:

- a destination for locals and visitors to enjoy the beach and the bush adjacent to a bustling capital city
- providing a high standard of facilities enhancing visitors' recreational activities, experiences, and appreciation of the natural and cultural values; and
- providing a diverse range of recreation activities while nurturing a natural environment.



Guiding principles for the Plan include:

- aligning with the NT-wide visitor strategies
- maintaining and protecting the Reserve’s natural and cultural values
- providing a diverse range of recreation opportunities for visitors through the development and upgrade of facilities
- development and implementation of an erosion and drainage plan for environment conservation
- aligning with domestic animal regulations
- implementation of Darwin Harbour Crocodile plan
- implementation of asbestos management
- collaborating with the tourism sector for commercial development and environmental protection
- the key visitor sites include Dripstone Cliffs, Dripstone Park, Rapid Creek open area, Casuarina Beach (including the free beach), Lee Point and Buffalo Creek.

Priority experiences identified for the Reserve include:

- recreational fishing
- exercise
- boating
- walking
- cycling
- bird watching; and
- picnicking.¹¹²



Crab Claw Island
Image: Tourism NT/Michael Costa

George Brown Darwin Botanical Gardens

The visitor experience development plan for the George Brown botanical gardens (2016) notes that the destination attracted 348,000 visitors in 2015. The Plan aims to enhance visitor experiences to encourage both new and repeat visitation.

In addition to the development of a new visitors centre (completed in 2020), the plan identifies a range of capital works to enhance visitor attraction and experience, they include:

- hospitality and event facilities and provision
- enhanced plant display and engagement experiences
- a wetlands experience
- path networks, parking and service upgrades
- playground and event area upgrades
- development of outdoor exercise facilities; and
- new interactive online visitor experiences.

Joint management plans

Joint management plans have been considered in DMP development for Adelaide River Conservation Reserve and the Mary River National Park.

Tourism NT acknowledges the Limilngan-Wulna people jointly manage Djukbinj National Park and speak for this land.

The Adelaide River Conservation Reserve Joint Management Plan includes Fogg Dam, Harrison Dam, Black Jungle/ Lambell's Lagoon Conservation Reserves and Melacca Swamp Conservation Area. The Wulna people are the Traditional Owners and signatories to the Indigenous Land Use Agreements for the Adelaide River Conservation Reserves. The key outcomes for the joint management plan include:

- providing visitors the opportunity to safely experience the iconic wetlands of the region

- investigating environmentally sustainable opportunities for commercial and tourism developments
- maintaining the strength and recognition of Reserves' Aboriginal cultural and historical sites; and
- ensuring community engagement in the management decisions of the Reserves.

The Mary River National Park is jointly managed by NT Government and the Traditional Owners; the Limilngan people in the north and west, and the Uwynmil people to the south. The priorities of the joint management plan include:

- providing ongoing conservation of the significant Aboriginal cultural and natural values of the Park
- ensuring sustainable public use of the Park; and
- recognising the deep cultural and spiritual significance the land has to the Traditional Owners.

The management plans across the region underline the significance Aboriginal culture, history and sustainable management for future generations has on the community. This demonstrates a cohesive and practical way for Traditional Owners and government to ensure their interests and values are preserved, while providing ongoing opportunity for development.

Regional Council Plans

Six councils have a role in providing services and governance in the Greater Darwin region, including:

- City of Darwin Council
- Tiwi Island Regional Council
- City of Palmerston Council
- Litchfield Council
- Wagait Shire Council; and
- Coomalie Community Government Council.

All councils have differing priorities, infrastructure and approaches for the development of destinations in their municipality that should inform tourism planning in the region.

City of Darwin Council

The *Darwin 2030 Strategic Plan*¹¹³ aims to create:

- a capital city with best practice and sustainable infrastructure
- a safe, liveable, and healthy city
- a cool, clean, and green city
- a smart and prosperous city
- a vibrant and creative city by 2030.

Targets include for Darwin to:

- be recognised as an iconic destination
- be recognised globally as a smart city
- offer sustainable investment opportunities by 2030.

Key strategic actions that City of Darwin will achieve by 2030 include partnering with other stakeholders to grow the visitor economy, delivering a City of Darwin events program and supporting other events that attract visitors, supporting the promotion of Darwin as a cruise ship and yachting destination, promoting Darwin as a destination known for its Aboriginal cultures and landmarks, and implementing an Economic Development Plan¹¹⁴ for the city.

The City of Darwin *Economic Development Strategy 2030*¹¹⁵ explores how the City will meet its target to 'grow the tourism industry'. City of Darwin, as a representative of ratepayers and the broader community, has a responsibility along with other levels of government, to ensure that Darwin prospers and grows. To do this we are committed to taking a leadership role and working with key strategic partners, including the Australian and Northern Territory Governments, to promote Darwin to national and international investors, industries and businesses that may wish to establish in Darwin. We will actively work with the Territory Government and Top End Tourism to promote Darwin as an attractive and premier tourism destination.

The City of Darwin engaged in a visioning project with stakeholders of the tourism industry in November 2020. Guided in a facilitated workshop, the project identified a unique vision for tourism in Darwin. This vision is to develop and showcase tourism experiences across the Larrakia seasons and seven senses of sight, sound, taste, touch, scent, spirit and being.





Aboriginal cultural experience on Tiwi Islands
Image: Tourism Australia/James Fisher

Tiwi Island Regional Council

The *Tiwi Island Regional Council Regional Plan and Budget 2021-2022*¹¹⁶ aims to provide effective Council services to the Tiwi Island community and other stakeholders that will benefit local tourism development.

A goal of the Council is to 'facilitate the development of socio economically responsible opportunities on the Tiwi Islands'. Mechanisms proposed by the Council to deliver this goal focus on:

- economic cooperation
- local business support
- major event support; and
- major infrastructure developments.

City of Palmerston Council

The *City of Palmerston Council Municipal Plan 2020-2021* forecasts a \$20.4 million spend on renewals, upgrades and new infrastructure over 2021-22 to improve the city brand and attract more short-term tourists and long-stay residents.¹¹⁷

A master plan has been drafted for the City of Palmerston, focusing on infrastructure improvement (reuse and new design) with the objective of attracting people to the city centre.¹¹⁸

In addition, the city's *Palmerston Local Economic Plan 2021-2031* identifies tourism as a potential future economic development lever and seeks to grow and encourage tourism investment. The City will focus its efforts on the development of product like bird-watching and eco-tourism.

Litchfield Council

The *Litchfield Council Tourism and Events Strategy 2021-2024* has outlined objectives to develop tourism in the region:

- optimising tourism opportunities and events
- identifying partnerships and opportunities for collaboration
- increasing recognition of Litchfield as a destination
- enhancing the visitor experience through events.¹¹⁹

Wagait Shire Council

The *2020-2025 Wagait Strategic Plan* the following planned tourism infrastructure developments:

- provide safe and attractive parks, gardens and open areas
- provide reliable roads.¹²⁰

Coomalie Community Government Council

The *2017-2022 Coomalie Community Government Council Strategic Plan* identifies planned tourism infrastructure developments to create and maintain attractive, sustainable open spaces for public use and enjoyment including:

- maintaining levels of service to parks and gardens
- increasing standard of playground equipment
- maintaining and upgrade local roads
- supporting Adelaide River Railway Precinct
- developing a tourist information centre in Adelaide River.¹²¹

Community plans

In addition to regional and local councils, Aboriginal communities in the Greater Darwin region are also involved in tourism development activities.

The NT Government established Local Decision Making (LDM) commitments to provide opportunities to transfer government services delivery to Aboriginal Territorians and organisations based on their community aspirations. The NT Government is engaged with the Tiwi Land Council, Tiwi Island Regional Council and Tiwi leaders to explore the Tiwi's aspirations and how the LDM can help to achieve them.



Appendix E

Accessible tourism

Accessible tourism focuses on the notion that tourism should be accessible to everyone. Accessible tourism is the endeavour to ensure tourism destinations, product and services are accessible to all people, regardless of their physical limitations, disabilities or age.¹²²

Accessible tourism is useful to a broad range of stakeholders recognising that support needs span across those travelling with prams, seniors with mobility requirements, and people with permanent or temporary disabilities.

Accessibility considerations

The size of the population of people living with a disability is significant and warrants consideration as to how this cohort can best be engaged in tourism. Globally, one billion people are living with a disability and in Australia, one in six people are estimated to have a disability, representing 4.4 million people.¹²³ These figures are compounded by an increasing prevalence of persons with a disability, as the population ages and chronic diseases spread.¹²⁴ For example it is estimated that by 2050, over one quarter of the population will be over age 65, a factor creating greater demand for mobility access.

In Asia, one of the NT's closest geographic partners, 650 million people have a disability.¹²⁵ Of these, 85 million are in China¹²⁶ and 7.5 million are in Japan.¹²⁷ With Asian countries accounting for around half of international visitors to Australia, and Japan being the biggest source market in the NT,¹²⁸ this is a notable cohort.

The size and growth trends of the population requiring greater tourism accessibility in the NT offers a significant social and economic basis for investment in accessibility strategies, and approaches to supporting and engaging this market cohort.

Accessibility in the NT

In the Territory, several initiatives have been undertaken to contribute to accessible tourism, however there is not yet an overarching strategy or comprehensive plan to address accessibility in tourism in the NT, establishing an opportunity for the NT to better engage the cohort of travellers with accessibility needs.

Identified accessibility initiatives in the NT include:

- Tourism Top End accessibility guide for Darwin 2018
- City of Darwin's accessible beaches review
- the Mindil beach access project
- City of Darwin *Access and Inclusion Plan 2019-2022*
- the accessible point to point transport working group.

Tourism Top End has developed an accessibility guide for Darwin, which contains information about various sites around the city which are accessible, where to find disability services, medical and emergency services, and transport options.

Accessible beaches has undertaken reviews of access and inclusion at the Darwin Waterfront, Casuarina Beach, Mindil Beach and Nightcliff Beach. The objectives of the reviews were to:

- identify current user experience at the reviewed locations
- identify opportunities to improve accessible and inclusive facilities at the reviewed locations; and
- provide a report with findings and recommendations.

Additionally, the City of Darwin's *Access and Inclusion Plan 2019-2022* provides a framework to continue to support people with disabilities and other access challenges. The plan looks at four key areas:

- built and natural environment
- services and programs
- information and communication
- council operations.

The Department of Infrastructure, Planning and Logistics has established the Accessible Point to Point Transport working group, a Territory-wide accessibility initiative. The group was established to examine and provide recommendations to improve point to point transport services delivered to persons in wheelchairs.

National Disability Services NT has called for the establishment and implementation of a funding program to assist NT businesses to create accessible tourism product and services to drive visitation and increase the quantity and quality of accessible tourism product across the NT.¹²⁹



Litchfield National Park
Image: Tourism NT/Shanaa McNaught

Potential scope of the accessible tourism market

The potential scope of the accessible tourism market presents an important social and economic opportunity for the Territory.

It is estimated that 1.3 million Australians with disabilities travel each year. When considering that many people with a disability travel with a carer (resulting in a multiplier of 2.45 (overnight) or 2.62 (day trips)), an estimated 3.4 million people are travelling with accessible travel needs.¹³⁰

Tourism Research Australia estimates that domestic tourists with a disability spend \$3.2 billion annually, when measured with a multiplier considering carer travel. The value of the sector has the potential to be as high as \$8.0 billion.¹³¹

While limited data is available to consider travellers with a disability in the NT, we know that in Queensland, domestic travellers with a disability accounted for 8% (289,000) of the Queensland adult population. The average travel party size for a Queensland resident with a disability is 2.3 people. Including children, this accounts for 13% (657,000) of Queensland's total population. Estimated spend for travel parties of persons with disability was \$1.9 billion, roughly 10% of total domestic spend in Queensland.¹³²

Similarly, travellers with a disability represented 7% (349,000) of Victoria's adult population. The average travel party size was 2.2 for Victorian residents with disabilities, which accounted for 12% of Victoria's total population (784,000). The estimated spend for travel parties including a person with disability was \$1.7 billion, 79% of which was overnight spend. This also accounted for 10% of total domestic spend in Victoria.¹³³

Accessible tourism product needs

Current statistics indicate that people with disabilities travelled almost as frequently as people without disabilities.¹³⁰ Of the cohort of travellers with a disability, almost a quarter (24%) had taken an overseas trip, indicating that distance of travel from home is not always a barrier to this cohort.

Travability's report *Understanding the Opportunity for Australia in Accessible Tourism* demonstrated that among those travelling with a disability, mobility (difficulty moving more than a short distance) was the most common access challenge (representing 44% of those surveyed). In addition, the survey highlighted that people experiencing a disability will often face multiple challenges, requiring tourism accessibility consideration to address the spectrum of mobility, vision, hearing or cognitive access impairments.

While there are differences in accessibility needs, the activities that travellers with a disability participate in are very similar to those of travellers without a disability. See *Table 8* which demonstrates the similarity between cohorts.

Table 8 - Top activities for travellers with a disability compared to the general population

Activity	Identify with disability	Do not identify with disability	Total
Eat out / dine at a restaurant / café	62%	63%	63%
Visit friends and relatives	53%	45%	46%
Go to the beach	25%	31%	30%
Sightseeing / looking around	25%	24%	24%
Go shopping for pleasure	25%	20%	21%
Pubs, clubs, discos, etc.	23%	22%	22%
Visit national parks / rainforest walks	11%	11%	11%
Go to markets	10%	8%	9%
Bushwalking / rainforest walks	9%	12%	11%
Picnics or BBQs	8%	7%	7%
Visit museums or art galleries	7%	6%	6%
Fishing	7%	7%	7%
Go on a daytrip to another place	6%	6%	6%
Exercise, gym or swimming	6%	8%	8%
Visit history / heritage buildings, sites or monuments	6%	5%	5%
Play other sports	4%	3%	3%
Water activities / sports	4%	6%	6%
Visit wineries	4%	4%	4%
Attend festivals / fairs or cultural events	4%	4%	4%
Visit botanical or other public gardens	3%	4%	4%
Visit food markets	3%	2%	2%
Attend movies / cinema	3%	3%	3%

Source: Travability, *Understanding the Opportunity for Australia in Accessible Tourism*.

Other accessible tourism needs

A Tourism Research Australia study of accessible tourism in 2017¹³⁴ identified the specific needs of the accessible tourism market focused heavily on information and support services, including:

- information
- planning
- service; and
- facilities and transport.

In the study, travellers with a disability listed more detailed information as their highest priority. These travellers require information that is related to their disability, easy to find, well structured, and relevant.

Despite this being a priority, currently no central service is available to tourists seeking advice on accessible tourism options in the NT. While the Tourism Top End Accessibility Guide for Darwin offers a good starting point for persons with a disability planning a holiday, the limit of available public information means visitors are often required to enquire directly with providers. This approach presents a significant barrier to attracting travellers with a disability as previous studies have found that where disability access 'information isn't widely publicised, the visitor may choose to avoid the area. Not knowing if a hotel has accessible rooms may mean they avoid particular hotels or destinations more broadly.'¹³⁵

An opportunity exists for a regional and Territory-wide approach to collating accessible tourism information and communicating this to the visitor market. According to Travability's *Understanding the Opportunity for Australia in Accessible Tourism*, travellers with a disability said they want:

- information contained on review sites such as Tripadvisor that is relevant to their specific needs
- specialised review sites for their needs
- accreditation that shows businesses have made the commitment to accessible travel.

In addition to the availability information, personal contact with a business or destination was more likely to convert interest to visitation, as were travel agents with a strong service ethic who could inspire travel when the travellers don't know what is possible.¹³⁶

It was found that travellers with a disability face challenges regarding attitudes and understanding from tourism and hospitality staff. This was particularly prevalent among young travellers with a disability and those with a 'hidden disability' whose disability may not be easily obvious.

Education and customer service campaigns for tourism operators in the region may help to address these barriers and deliver the personal service that converts interest to visitation amongst this cohort of travellers.

Cost was another important factor for travellers with a disability, who mostly need to travel with a carer, making the cost of travel higher than others. Assistance with these costs or special deals for those traveling with a carer could assist in removing these barriers.¹³⁷

Facilities and transport are additional barriers to travellers with a disability. Improvements in practical information such as location of accessible toilets, lifts, more prominent information on tourism websites, better public transport access, better access at airports, and a better range of accommodation are solutions to these barriers.¹³⁸ For the Big Rivers region where drive accessibility is particularly relevant for travellers, signage and accessible amenities in the region should be a focus for local and Territory governments.

Key considerations

A sizable proportion of the Australian and global population experiences a disability, and with a growing prevalence there is both a significant social justice and economic imperative to work towards delivering accessible tourism for all. Evidence from some states in Australia shows that travellers with disability comprise on average 10% of the domestic market spend.

Currently no strategic approach to accessible tourism exists in the NT or the region, resulting in a gap in the tourism offering, and an opportunity for the development of the tourism industry.

Notably travellers with a disability are seen to participate in similar activities to persons without a disability, and at a similar rate of participation, indicating the ability to meet the needs of this market, through a focus on accessibility of existing experiences and facilities in the region.

A number of visitor experiences in Darwin already meet universal accessibility standards, however this is largely a result of infrastructure development standards, and has not been driven through a comprehensive strategy, resulting in gaps and limitations in the accessibility of tourism products in the region.

A number of leaders across government, industry and the community are working to enhanced accessibility in the region and provide a launch-pad to support and enable the development of accessible tourism product and a comprehensive plan for the region.

Recognising opportunities to enhance accessible tourism, it is recommended that efforts to build accessible tourism in the region should focus on: enhancing the scale of accessibility offerings; collation and communication of accessibility offerings in the region with the accessible tourism visitor market; and assessment of the accessibility of enabling infrastructure and services to connect visitors with accessible tourism experiences.

Further to localised action, an opportunity exists for accessible tourism efforts to be scaled across the NT.



Appendix F

Greater Darwin region visitor market

Detailed visitor demand data offers insights regarding who is currently travelling to the Greater Darwin region, and their travel preference. This information builds awareness of visitor trends to guide and support business and strategic decision making by leaders in the tourism industry. The following section considers data relating to visitor demographics, visitor consumption and visitor travel preferences.

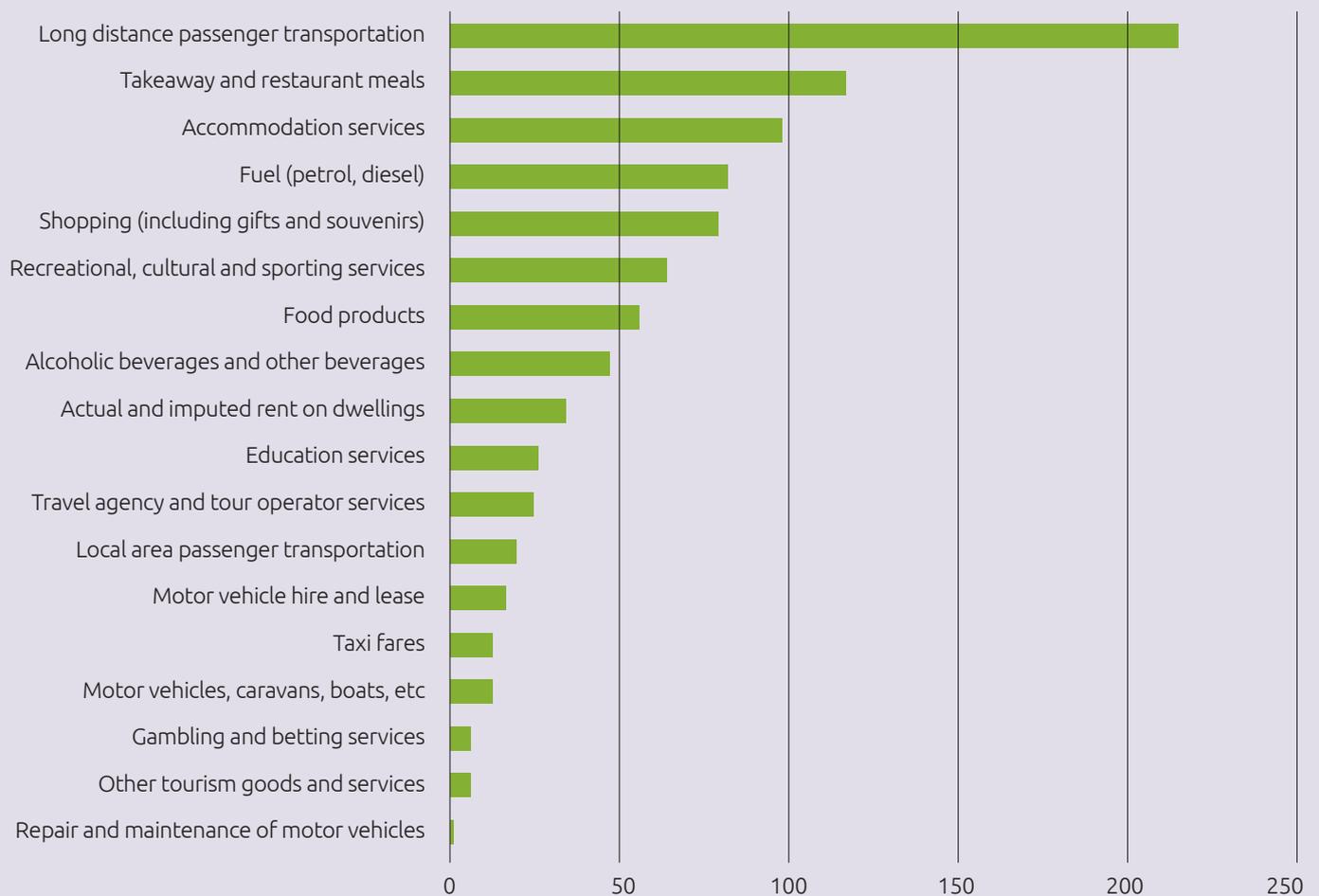


Figure 7 - Tourism consumption (\$ million) summarises consumption by the Darwin region's visitor market.

Source: Tourism Research Australia, Regional Tourism Satellite Account: Darwin 2019-20

Note: Data is for Darwin SA4. Excludes other sub-regions such as Litchfield and Batchelor.

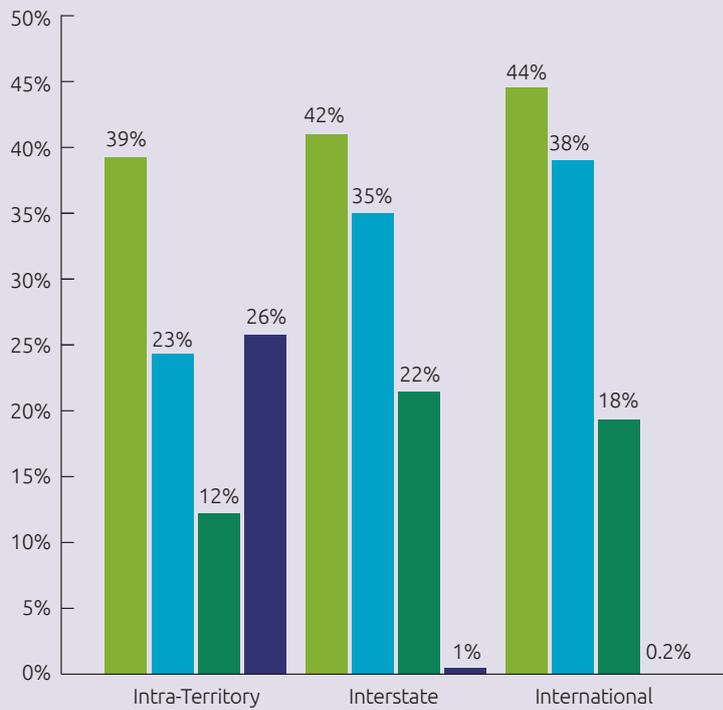


Figure 8 - Visitation by quarter, Greater Darwin, 2019

Source: Tourism NT, Tourism NT Regional Profile: Greater Darwin 2019

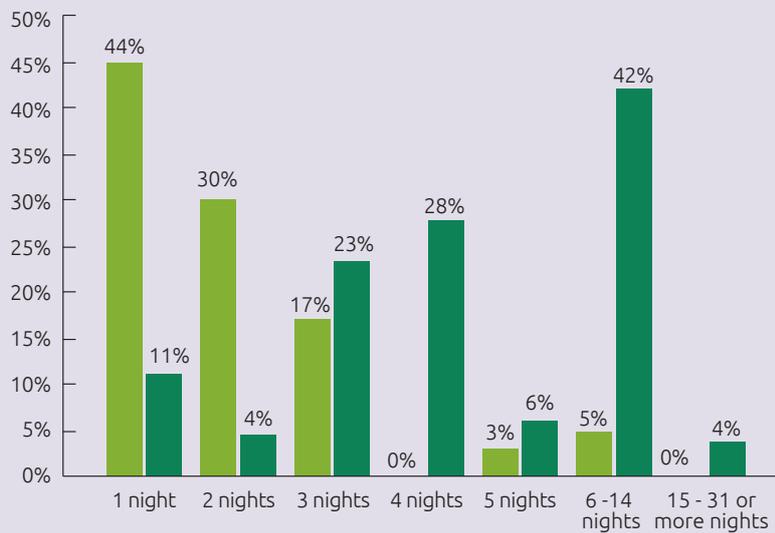
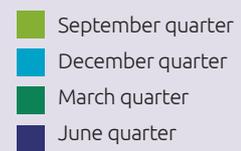
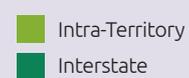


Figure 9 - Length of stay – domestic leisure drive market, Greater Darwin, 2019

Source: Tourism NT, Tourism NT Regional Profile: Greater Darwin 2019



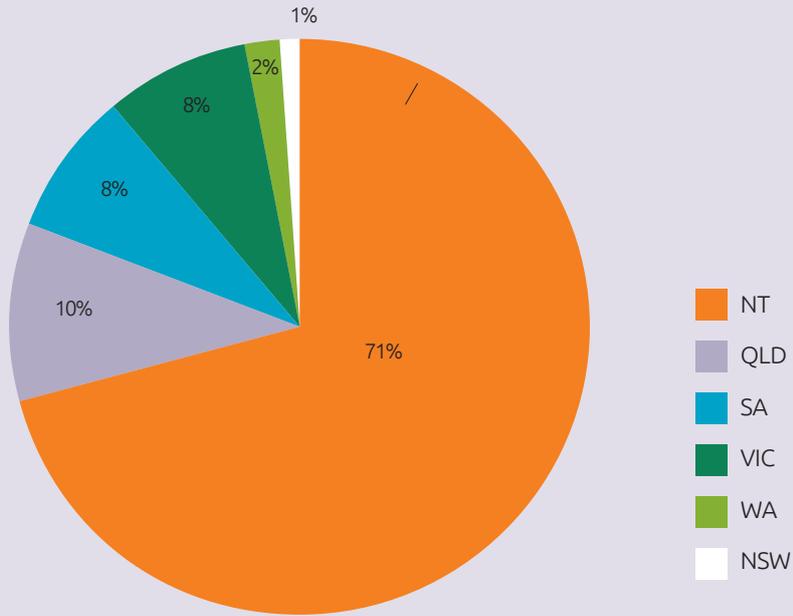


Figure 10 - Domestic leisure drive source markets

Source: Tourism NT, Tourism NT Regional Profile: Greater Darwin 2019

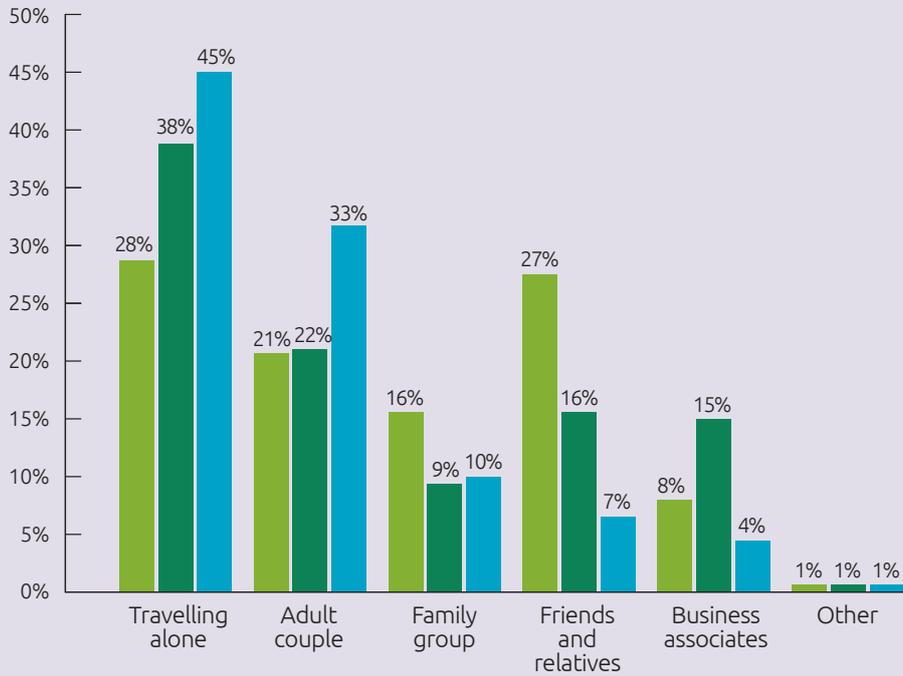


Figure 11 - Visitation by travel party type, 2019

Source: Tourism NT, Tourism NT Regional Profile: Greater Darwin 2019



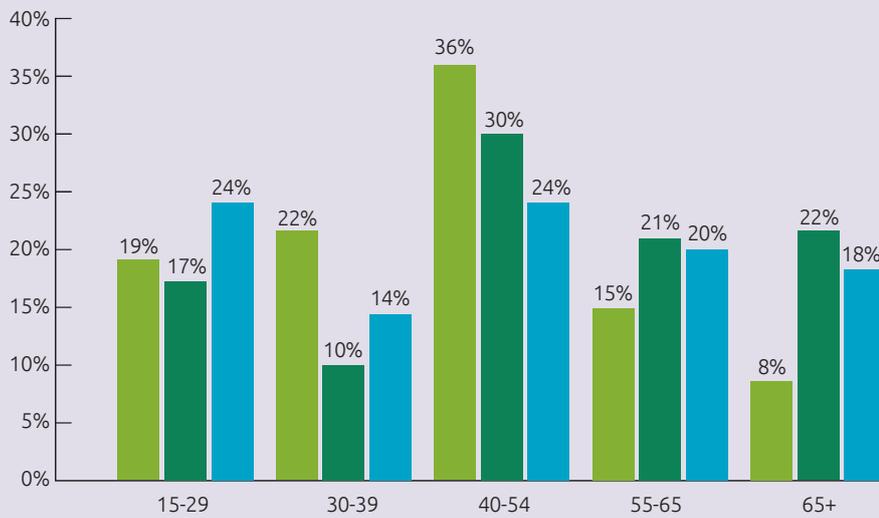


Figure 12 - Visitation by age group, 2019

Source: Tourism NT, Tourism NT Regional Profile: Greater Darwin 2019

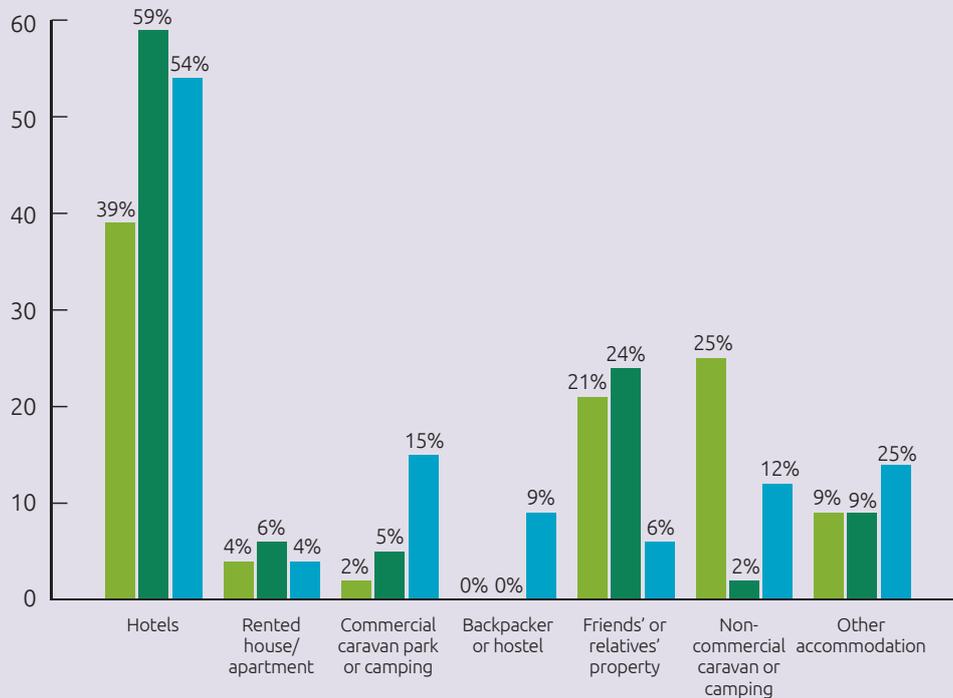


Figure 13 - Visitation by accommodation type used, 2019

Source: Tourism NT, Tourism NT Regional Profile: Greater Darwin 2019



*Other accommodation includes other non-commercial property such as free camping or roadside rest stops, private accommodation (not friends or family), guest houses/bed and breakfasts, accommodation in FIFO location, hospital related accommodation and not stated.



Appendix G

ReviewPro data analysis

ReviewPro is one of a number of tools utilised by Tourism NT to collect feedback that informs and supports strategic decision making relating to tourism industry development. ReviewPro is a software platform that collects information relating to visitor satisfaction, by collating findings of visitor reviews from sites such as Tripadvisor, Google, Booking.com and Expedia.

The program uses data to analyse visitor experiences relating to hotels, attractions and restaurants. ReviewPro is used across the tourism industry to benchmark operators and is relied upon by other government agencies across jurisdictions in Australia to support tourism industry development outcomes.

Service

Service was mentioned a total of 3,177 times, increasing by 1,624 mentions when compared with the year before - 2020.* The majority (72%) of mentions were positive. Compared to the year before, the below concepts received a higher proportion of mentions:

Positive	Negative
Queue	Service
Treatment	Assistance
Attitude	Room service
Personality	Order
Wait	Fast

Staff

Staff were mentioned 11,581 times, increasing by a total of 5,823 mentions from the previous year. Staff mentions were almost always positive (89%), indicating that visitors had an overall pleasant experience with staff. Staff, guide and crew all maintained positive mentions of greater than 90%. Compared to the year before, the below concepts received a higher proportion of mentions:

Positive	Negative
Staff	Management
Guide	Crew
Owner	Team
Communication	Training
Waiter	Lifeguard

Value

Value was mentioned 7,881 times, increasing by almost 4,000 mentions over the previous year. 67% of references were positive. Although the concept of 'value' received more negative responses from the prior year, 95% of mentions were positive, implying that overall value was well-regarded by visitors. Compared with the previous year, the below concepts received a higher proportion of mentions:

Positive	Negative
Bill	Price
Discount	Value
Voucher	Payment
Surcharge	Deposit
	Ticket

*Note: Comparisons are year on year using 2020 and 2021 data, unless otherwise stated.



Appendix H

Stakeholder engagement

Organisation
AAT Kings
Adelaide River Post Office and Store
Airport Development Group
Anglers Choice Fishing Safaris
Batchelor Holiday Park
Batchelor Museum & Pell Airstrip
Boardwalk and Boatshed Café
Britz/THL
Campervan and Motorhome Club of Australia
Charles Darwin University
Cookes Tours
Coomalie Community Government Council - Councillor Elect
Coral Expeditions
Cox Country Club
Darwin City Waterfront Retailers Association
Darwin Convention Centre
Darwin Festival
Darwin Off Road Cycling
Darwin Port
Department of Chief Minister and Cabinet (Investment Territory)
Department of Territory Families, Housing and Communities
Goodfellow
Grand Touring Coaches
H Hotel

Organisation
Lake Bennett Body Corporate & COTA
Litchfield Tourist Park
Litchfield Tropical Retreat
Mantiyupwi Pty Ltd
Mindil Beach Casino Resort
Museum and Art Gallery of the Northern Territory
No Trace Bushwalking
Noonamah Tourist Park
Novotel and Mecure Resort (Accor)
NT Education Adventures
NT Major Events Company
Oaks Darwin Elan Hotel
Ramada Suites by Wyndham Zen Quarter Darwin
Rum Jungle Bungalows
SeaLink NT
Territory Wildlife Park
Thrifty/NT Car Rentals
Tiwi Design
Tiwi Enterprises
Tourism Australia
Tourism Top End
Virgin Australia Airlines
Wallaroo Tours and Tour Tub
WWII Oil Storage Tunnels



Cullen Bay sandbar business event
Image: Tourism NT

Acronyms

Acronyms	
ATC	Aboriginal Tourism Committee
CDP	Consumer Demand Project
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
GRI	Global Review Index
GRP	Gross Regional Product
GSP	Gross State Product
HNT	Hospitality NT
ISACNT	Industry Skills Advisory Council NT
LDC	Larrakia Development Corporation
LDM	Local Decision Making
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

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Aquascene tour experience
Image: Tourism NT/Aquascene

Back cover
Tolmer Falls, Litchfield National Park
Image: Tourism NT/Dan Moore



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