Destination Management Plan Barkly Region 2020

Key Partners

TOURISM CENTRAL AUSTRALIA

BARKLY REGIONAL COUNCIL

NORTHERN TERRITORY TOURISM NT

NORTHERN TERRITORY GOVERNMENT

Contents

1 The Barkly Region Destination Management Plan

The Barkly Region (the Region) is located in the central district of the Northern Territory (NT) and shares its eastern border with Queensland. It is nestled between the East Arnhem, Big Rivers and Alice Springs and MacDonnell Ranges regions in the NT.

The Barkly Region Destination Management Plan (DMP) identifies key strengths and assets across the Region. The plan considers visitation demand insights, existing planning and priorities for destinations in the Region and stakeholder input. Actions have been identified to activate opportunities, address gaps and prioritise product development seeking to meet visitor demand while encouraging the development of a sustainable tourism sector for the Region.
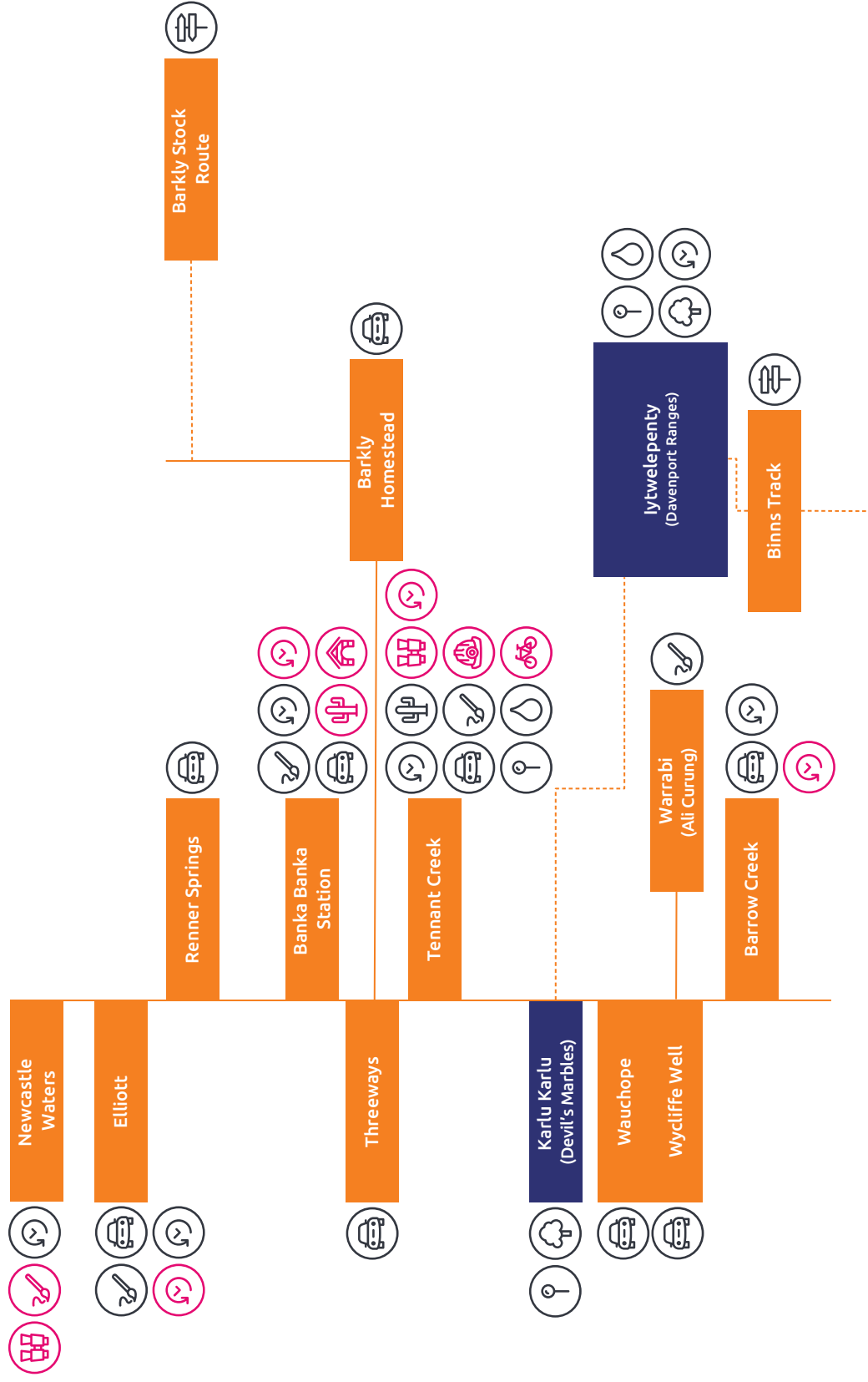
The Department of Industry, Tourism and Trade has invested in destination management planning as part of a suite of actions following the development and release of the *NT's Tourism Industry Strategy 2030*. Stakeholders' contributions through direct engagement were collected in the consultation process. Stakeholder feedback has informed the guiding principles to development of the Region's tourism industry and supported analysis and design of the DMP.

Tourism in the Barkly Region

The Barkly Region is significant in scale, extending over an area of more than 323,000 km^2, accounting for a quarter of the land mass of the NT. Located between the Arnhem and Alice Springs and MacDonnell regions, bordered to the east by Queensland and connecting to the Big Rivers region.

Barkly is most frequently visited by travellers touring between regions of the NT, establishing the Region as a key destination during transit in the NT. The Region offers gold mining and WWII heritage, Aboriginal culture and nature based experiences which are key attractions for visitors.

A snapshot of the key tourism destinations and experiences in the Region is shown in Figure 1, which also highlights the range of potential experiences to be addressed throughout the region, as identified during stakeholder consultations (these are marked in pink). The snapshot highlights the potential for the Region to expand its current tourism offerings by enhancing or adding to the existing experiences and developing a sustainable tourism industry.

Barkly Stock Route

Barkly Homestead

Iytwelepenty
(Davenport Ranges)

Binns Track

Newcastle Waters

Elliott

Renner Springs

Banka Banka Station

Tennant Creek

Threeways

Karlu Karlu
(Devil's Marbles)

Warrabi
(Ali Curung)

Barrow Creek

Wauchope

Wycliffe Well

Figure 1 - Barkly Region tourism experiences

Glamping

Outstanding natural setting

History and heritage

Services (fuel, accommodation, food, etc.)

Mining experiences

National Park/Reserve

Outback experience

Arts and culture

Adventure sports

Swimming

Four-wheel driving

Bird watching

Existing product

Proposed/potential product

Tourism is an important industry for the Barkly Region, contributing

$50 million

to the Region's economy in 2017/18 and employing approximately

10%
of the working population[1]

Across 2016-2018, the Barkly Region received an average of

142,000
overnight visitors,

the vast majority of which

(89%)
were Australian domestic travellers[2]

Those travelling by private vehicle (including rental car or motorhome) accounted for

78%
of all visitors to the Region[3],

emphasising the significance of the domestic drive market to the tourism industry for the Region.

Tourism in the neighbouring NT regions

Table 1 below indicates the Barkly Region attracts limited visitation in its own right. However the Barkly is an important connector of tourism regions in the NT, with many visitors travelling from Barkly onto other regions and as a critical supply base for the drive market.

Table 1 - Travel occurring between the Barkly Region and other regions of the NT, percentage of overnight visitors

Region	Visitor	To Barkly	From Barkly
Greater Darwin	International	8	73
	Domestic	9	55
Kakadu and Arnhem Land	International	17	27
	Domestic	17	34
Big Rivers	International	30	69
	Domestic	37	84
Alice Springs and MacDonnell	International	9	78
	Domestic	28	80
Lasseter	International	6	68
	Domestic	14	47

Source - *Tourism NT, Regional Profiles*

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[1] Tourism Research Australia, *Regional Tourism Satellite Account 2017-18: Barkly*
[2] Tourism NT, Regional Profile: Barkly, Year Ending June 2017-2019.
[3] Tourism Research Australia, *Regional Tourism Satellite Account 2017-18: Barkly.*

The Barkly Region forms a central connection between the north and south of the NT and offers connections between the NT and Queensland. Notable drive journeys offered to visitors in the Region are listed in Table 2.

Table 2 - Road access and connections in the Barkly Region

Route	Contributes to tourism in the Barkly Region, as:	Key destinations of the Barkly Region on the route
Stuart Highway (also known as the Explorers Way)	The primary connection of northern and central NT and SA	Newcastle Waters, Tennant Creek, Karlu Karlu/Devils Marbles Conservation Reserve, Threeways, Wycliffe Well, Barrow Creek, Warrabi/Ali Curung, Wauchope, Banka Banka Station, Renner Springs, Elliot
Barkly Highway	A key connection between the NT and QLD	Barkly Homestead, Tablelands Highway, Stuart Highway
Tablelands Highway	Connector of Barkly and Carpentaria Highways	Barkly Homestead
Barkly Stock Route Road	Connector of Stuart and Tablelands Highways	Stuart Highway, Tablelands Highway
Calvert Road	Connector of Tablelands and Carpentaria Highway	Carpentaria Highway, Tablelands Highway
Binns Track	Unique four-wheel drive experience	Iytwelepenty/Davenport Ranges National Park

In addition to road access, several common experiences and attractions support linkages across the Barkly Region and other regions in the NT, as shown in Table 3. These connections act both as unique attractions for the Region, as well as attractions that support visitation across the regions.

Table 3 - Common experiences and attractions in the NT regions

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

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

Destination management planning for the Barkly Region

A comprehensive study of the current and potential state of the tourism industry for the Barkly Region was undertaken. This study has focused on understanding the current market, available and potential tourism experiences in the Region, opportunities for sustainable growth in the industry, and industry stakeholder priorities. This analysis highlights that the Region has highly rated visitor attractions, and opportunities to be further developed for the Region's tourism industry. Efforts to develop the tourism industry must be supported through broader social and economic activities that will address barriers to visitation, such as feeling safe and secure.

Guiding principles

Stakeholder input to destination management planning for the Region has identified that approaches to tourism development efforts should be guided by the following principles:

- Exceed visitor expectations
- Value the Region's culture and heritage
- Create a safe and welcoming environment.

Comparative advantages

The Barkly Region has unique strengths that have motivated visitation to the Region and can be further leveraged to support the development of the Region's tourism industry. Comparative advantages for the Region's tourism industry include:

Accessibility and attractiveness of drive touring in the Region;

the Barkly Region connects the north and south of the NT, and offers a timely and convenient rest stop to travellers journeying through the NT.

Authentic Aboriginal cultural attractions and experiences;

the Nyinkka Nyunyu Art and Culture Centre is highly rated by visitors, and opportunities exist to build the capacity of Aboriginal tourism in the Region.

The quality and uniqueness of the historical and heritage experiences in the Region;

the Battery Hill Mining Centre is highly rated by visitors, and opportunities exist to build the range of mining heritage experiences in the Region. WWII and pioneering heritage experiences are also available in the Region.

Destination awareness

Trade partners, national operators and visitor trends indicate limited destination awareness exists for the Barkly Region among visitor markets. In addition, the limited scale of the tourism industry in the Region results in limited capacity of operators to build identity awareness for the destination among potential visitor markets. Further, challenges in managing negative destination awareness have been highlighted by stakeholders, and further investment in destination marketing when barriers to visitation have been addressed in the Region may help to remedy negative perceptions among visitor markets.

Based on satisfaction feedback from visitors to the Region, and stakeholder feedback regarding visitor attractions, destination awareness building activities could leverage:

- Experiences at Karlu Karlu/Devils Marbles Conservation Reserve and Iytwelepenty/Davenport Ranges National Park
- Experiences at Nyinkka Nyunyu Art and Culture Centre
- Experiences at the Battery Hill Mining Centre
- The Region as a unique destination in the NT drive journey.

Approach to developing visitor experiences in the Region

Several opportunities exist to develop the tourism industry in the Region, through a focus on product development, destination development and capacity building over the next 10 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 the structures that enable the tourism industry to develop sustainably. Recent recognition of the size and diversity of the accessible tourism market is an example of how an opportunity to progress the Region will utilise multiple tools to meet market needs.

To meet these needs, this DMP utilises the following tools to support sustainable growth.

To best leverage the value of the Region's assets and effectively engage target visitor markets.

Strategic product packaging and marketing

Facilitate collaborative action

To maximise the efficient and effective use of resources in the Region to advance tourism outcomes.

To build the quality and quantity of tourism product in the Region.

Investments attraction initiative

Capacity building activities

To establish resilience and capability in the industry to deliver quality tourism experiences and support continuous improvements.

Tennant Creek Telegraph Station Historical Reserve

Industry gaps and opportunities

While the Region offers important services and experiences for visitors travelling across the NT, namely unique Aboriginal cultural, and history and heritage attractions, a number of barriers to visitation exist for the Region that need to be addressed to enable sustainable tourism development. 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.

Table 4 - Current opportunities and gaps in the Barkly Region tourism industry

		Approach to addressing opportunities and gaps
Opportunities to progress	Build on visitor satisfaction with Nyinkka Nyunyu Art and Cultural Centre by developing new cultural experiences	Strategic product packaging and marketing
	Build on visitor satisfaction with Battery Hill Mining Centre	Strategic product packaging and marketing
	High demand for Aboriginal and nature-based tourism among Australian and international visitors	Capacity building activities
	Leverage attractiveness of the natural Karlu Karlu/Devil's Marbles experience	Strategic product packaging and marketing
	Improve safety and security perceptions/experiences for visitors through environmental design and development	Investment attraction initiatives
	Capacity for product development leveraging the natural, cultural and historical assets of the Region, to meet the needs of the current market demand	Investment attraction initiatives and capacity building activities
	Maximise strategic planning, investment in tourism and infrastructure, Government services, and stakeholder capacity in the Region	Facilitate collaborative action
Gaps to address	Visitor surveys confirm a perception that Barkly is a transit destination	Investment attraction initiatives and capacity building activities
	Limited capacity in Aboriginal tourism product development in the Region	Capacity building activities
	Visual appeal and attractiveness of the destination	Investment attraction initiatives
	Mechanisms for engagement and collaboration between Government, Land Councils, industry and prospective investors	Facilitate collaborative action
	Limited business development capacity amongst industry operators, including identifying and applying for funding, marketing and product packaging	Capacity building activities
	Strategic coordination and delivery of infrastructure supporting tourism (signage, vehicle turning points, vehicle parking, rest stop, waste services, internet and communications)	Facilitate collaborative action
	Limited existing capacity and the lack of planning and strategic consideration for supporting accessible tourism in the Region	Capacity building activities and facilitate collaborative action
	Establish quality offerings from fresh food to unique culinary experiences focused on provenance	Investment attraction initiatives and capacity building activities
	Coordinate land access for prospective investors and developers	Investment attraction initiatives
	Poor satisfaction ratings and perceptions of the accommodation standard in Tennant Creek	Investment attraction initiatives and capacity building activities

Action Plan

To sustainably grow the Region's tourism industry, a focus on capacity building, collaborative action, strategic product packaging and marketing, and investment attraction is recommended. A plan for the activation of these four tools through strategic actions in partnership with multiple stakeholders in the Region is outlined below.

Capacity building activities

The capability at a destination level as well as in the tourism industry is of central importance to developing and delivering quality tourism experiences and supporting the sustainable growth of the industry in the Barkly Region. Currently capability is limited in the Region, with a small population, limited industry operators, and poor socio-economic outcomes. Opportunities exist to develop the capacity of Aboriginal tourism in the Region to deliver improved destination outcomes.

Why is this a priority?

- 70% of the Barkly Region's tourism businesses consist only of their owners or four or fewer employees.[4]
- NT destination satisfaction survey data identified feedback that most visitors view Tennant Creek as a transit destination.
- Aboriginal tourism experiences offer the potential to support the sustained development of the Region's tourism industry, if supported through capacity building endeavours.

Leads:	Partners:	Actions:	Outcomes:
DITT	TCA, Hospitality NT, ISACNT	1. Department of Industry, Tourism and Trade (DITT) in collaboration with Tourism Central Australia (TCA), Industry Skills Advisory Council NT (ISACNT) and Hospitality NT to complete an assessment and deliver a suite of targeted skills development and capacity building training services to tourism operators in the Region (including Barkly Regional Council).	• Enhanced skill and capacity of tourism operators to meet industry standards.
TNT	TCA, Hospitality NT	2. Tourism NT (TNT) to continue to invest in ReviewPro or similar data collection tools and work collaboratively with TCA and Hospitality NT to support the development of industry standards using data insights.	• Enhanced awareness among tourism operators of visitor expectations and satisfaction ratings • Improved satisfaction of visitors to the Region • An annual visitor satisfaction score card.
TNT	ATC, PIT	3. Tourism NT in partnership with the NT Aboriginal Tourism Committee (ATC), Project Implementation Team (PIT) and industry to continue to implement the *NT Aboriginal Tourism Strategy* to build capacity across the Aboriginal tourism sector.	• Increased quantity and improved quality of Aboriginal tourism products.
Arts NT	ATC, TNT, Art Centres,	4. Arts NT in partnership with the ATC to re-evaluate the NT Arts Trail with the aim to identify approaches to deliver this initiative.	• Action plan to maximise the outcomes from the NT Arts Trail.
TNT		5. Tourism NT to work with industry to implement self-assessment and rectify accessibility barriers in their operations.	• Enhanced accessibility of tourism experiences in the Region • Increased visitation, consumption and experiences in the Region.

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[4] Tourism Research Australia, 2019, Tourism Businesses in Australia.

Facilitation of collaborative action

A range of stakeholders are contributing to the outcomes of the tourism industry in the Barkly Region. Systems and processes which enable effective coordination and collaboration across stakeholder cohorts will enhance the likelihood of efficient use of resources, through realisation of opportunities to share resources, obtain information that supports effective planning and reduction in duplication and waste.

Why is this a priority?

- One of the primary motivating factors of domestic and international travellers is destination safety and security – a matter impacted by decision making across many government departments. Multiple stakeholders are required to coordinate services and infrastructure critical to the domestic drive market in the Region, such as waste and signage.
- Industry stakeholders engaged in consultation have expressed a desire to have greater engagement with government agencies and Tourism Central Australia to develop tourism outcomes.

Leads:	Partners:	Actions:	Outcomes:
TNT	PIT	1. Tourism NT to establish a Project Implementation Team (PIT) to deliver, monitor and evaluate the agreed actions of the DMP.	• Coordinated implementation of the DMP.
TNT	PIT	2. Tourism NT in partnership with the PIT to prioritise tourism communications infrastructure 'black-spots' in the Region.	• Increased investment in communications infrastructure across the NT.
DCM	TNT, ATC, CLC	3. Department of the Chief Minister and Cabinet (DCM&C), Tourism NT, ATC and the Central Land Council (CLC) to work collaboratively to review and address barriers to the coordination of Aboriginal land access in the Region.	• Action plan to improve the coordination of Aboriginal land access in the Region.
TNT	PIT	4. PIT to work within their agencies to coordinate Grant Programs to increase efficiency and ensure leveraging of common goals.	• Reduced confusion within industry on the multiple grant programs • Enhanced outcomes for the funding available.
BRC	TNT, DIPL, DCM&C, DTFHC	5. Barkly Regional Council (BRC) to prioritise maintaining thoroughfares and central public facilities in an effort to create 'welcoming public spaces' across the Region. Tourism NT, Department of Infrastructure, Planning and Logistics (DIPL) and DCM&C to provide support to funding applications that will increase community safety, pride and a welcoming feel.	• Enhanced visitor perceptions of safety and security • Enhanced visitor experience.
TCA	DITT, TNT	6. Establish a Barkly specific local tourism action and advocacy group.	• Better coordination between regional operators.

Strategic product packaging and marketing

Limited destination awareness exists for the Region. Challenges in managing negative destination awareness suggests further investment in destination marketing when barriers to visitation have been addressed.

Why is this a priority?

- NT destination satisfaction surveys suggest visitors primarily see Tennant Creek as a transit destination.
- Stakeholders advise that poor perceptions and experiences of safety and security are a barrier to visitation.
- National operators and trade partners have provided feedback that limited awareness of the destination exists among source markets.
- Limited number of operators resulting in reduced marketing activity.

Leads:	Partners:	Actions:	Outcomes:
TCA	TNT	1. TCA to facilitate packaging of tourism experiences in the Region.	• Enhanced number and range of experience packages for the Region • Increased visitation, consumption and experiences in the Region • Enhanced skill and capacity of tourism operators to develop product packages.
TNT	PIT, DIPL	2. Tourism NT to deliver a 'Drive Strategy' building a strategic approach to investment in road infrastructure and linkage of tourism priorities. The PIT to be part of the consultation and have ongoing input into the delivery.	• Increased visitation, consumption and experiences by the drive markets in the Region • Action plans for the coordination of waste, signage and infrastructure.
TNT	TCA, DITT, PIT	3. Tourism NT, TCA and industry to support destination awareness and promote the Region's identity.	• Enhanced destination awareness among visitor markets • Increased visitation, consumption and experiences in the Region • Enhanced skill and capacity of tourism operators to market and promote tourism experiences.
Heritage NT	National Trust, TNT, PIT	4. Tourism NT to support the history and heritage sector to realise the tourism potential of historical sites. Heritage NT and National Trust to continue to assist communities in maintaining and protecting key heritage assets in the Region.	• Increased visitation, consumption and experiences in the Region.

Investment attraction initiatives

The Barkly Region has a number of product opportunities which require development, or enhancement to enable a higher quality product offering through private investment.

Why is this a priority?

- Identified as a core priority in the *NT's Tourism Industry Strategy 2030,* targeted investment in the NT's product and regions will drive significant increases in visitation and stimulate further investment in experiences.

- ReviewPro positivity ratings for value in the Region are ranked at a moderate value of 74%.

- Stakeholder plans and activities to develop the destination present an opportunity to be leveraged by the tourism industry.

- A number of product development opportunities align to experiences resulting in visitor satisfaction such as Aboriginal culture and mining heritage experiences.

Leads:	Partners:	Actions:	Outcomes:
DITT	DCM&C, TCA, Hospitality NT, TNT, BRC, DIPL, PIT	1. Building on opportunities identified in the DMP, DITT and DCM&C in partnership with TCA, Hospitality NT, Tourism NT and industry, to develop a portfolio of product opportunities and engage across the public and private sector to establish a pipeline and investment prospectus.	• Establishment of a structured approach to tourism investment attraction and coordination in the Region • Increased tourism investment in the Region.
TNT	PIT	2. The PIT to develop and maintain a formalised framework for the articulation and development of investment initiatives in the Region.	• A prioritisation matrix to inform the DITT and DCM&C investment pipeline framework.
TNT	PIT	3. Align industry support and grant funding programs outcomes with DMP priorities.	• Increased quantity and quality of tourism experiences in the Region • Tourism NT grant programs aligning with DMP priorities.
TNT	PIT	4. The PIT and Government agencies to consider accessibility, when providing comment, or allocating funding to investment initiatives or grant rounds.	• Enhanced accessibility of tourism experiences in the Region • Increase visitation, consumption and experiences in the Region.
TNT	PIT	5. PIT to facilitate improved processes within the respective organisations to expedite investment opportunities.	• Increased tourism investment in the region.

Acronyms

ATC - Aboriginal Tourism Committee

BRC - Barkly Regional Council

CLC - Central Land Council

DCM&C - Department of the Chief Minister and Cabinet

DIPL - Department of Infrastructure, Planning and Logistics

DITT - Department of Industry, Tourism and Trade

DMP - Destination Management Plan

DTFHC - Department of Territory Families, Housing and Communities

ISACNT - Industry Skills Advisory Council NT

PIT - Project Implementation Team

TCA - Tourism Central Australia

TNT - Tourism NT

Product development opportunities

In consultation with stakeholders, priority product development opportunities have been identified to support the sustainable development of tourism in the Region. A complete list and assessment of these opportunities is detailed in Appendix A. With consideration of industry insights, prioritisation of high impact and attainable opportunities that will facilitate the broadest impacts on the development of the Region's tourism industry across the Region are listed in Table 5.

Table 5 - Priority product development opportunities in the Barkly Region

	Product opportunities	Product status	Level of stakeholder support	Current status	Estimated scale of investment	Possible action
Newcastle Waters	Develop off highway campground facilities with historic/cultural product offering	New	Concentrated	Identified opportunity	Medium - High	Site inspection and planning
Tennant Creek	Develop mining history experiences and products	New	Broad	Identified opportunity	Low - Medium	Market assessment
Tennant Creek	Enhance Nyinkka Nyunyu Art and Culture Centre infrastructure and establish Aboriginal cultural tours and immersion	New	Concentrated	Identified opportunity	Medium	Market assessment
Tennant Creek	Establish contemporary visitor information centre facilities	Existing	Concentrated	Study in progress	Medium – high	In progress
Tennant Creek	Establish state of the art facilities at Battery Hill Mining Centre site (informed by existing scoping study)	New	Extensive	Study in progress	High	Market assessment
Tennant Creek	Establish and improve quality accommodation offerings in Tennant Creek	Existing	Extensive	Identified opportunity	High	Market assessment
Tennant Creek	Enhance visitor amenities at Lake Mary Ann with possible accommodation offerings	Existing	Extensive	Identified opportunity	High	Market assessment
Karlu Karlu	Enhance the overnight facilities at Karlu Karlu / Devils Marbles Conservation Reserve in consultation with the Traditional Owners	New	Concentrated	Identified opportunity	High	Business case
Banka Banka	Enhance accommodation options and services	Existing	Concentrated	Identified opportunity	Medium - High	Market assessment
Barkly Region	Develop Stuart Highway, WWII and pastoral history journey experience	Existing	Concentrated	Identified opportunity	Medium	Market assessment
Barkly Region	Increase and/or revitalise regional events (including sporting events)	Existing	Concentrated	Identified opportunity	Medium	Market assessment
Barkly Region	Develop night time tourism experiences	Existing / New	Extensive	Identified opportunity	Low – medium	Market and feasibility assessment
Barkly Region	Improve regional and remote art centre / Art Trail products in the Region	Existing	Extensive	Planned activity	Medium	Grants and funding initiative

Legend		Level of stakeholder support		Estimated scale of investment ($AUD)	
Aboriginal cultural offerings		**Concentrated**	Local community, individual or single Govt. agency	**High**	+1 million
History and heritage offerings		**Broad**	Community + others, or multiple agencies	**Medium**	0.1 – 1 million
Quality facilities		**Extensive**	Community, Govt., multiple agencies and/or industry	**Low**	0 – 100,000

Implementation, monitoring and evaluation

Tourism NT will lead the Project Implementation Team (PIT) who will be responsible for implementation of the DMP. The PIT consists of representatives from:

- Tourism Central Australia
- Central Land Council
- Barkly Regional Council
- Julalikari Council Aboriginal Corporation
- Department of the Chief Minister & Cabinet
- NT Department of Infrastructure, Planning and Logistics
- NT Department of Industry, Tourism and Trade
- NT Department of Environment, Parks and Water Security
- NT Department of Territory Families, Housing and Communities.

The 10 year 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 score card. To enhance tourism outcomes in the Region it will require alignment and collaboration across the public, private and community sectors. Reviews of the DMP every two years will ensure stakeholders from the tourism sector as well as stakeholders from all sectors are involved in providing feedback and contributing to a sustainable tourism sector for the Region.

Old Police Station Waterhole – Iytwelepenty / Davenport Ranges National Park

Bill Allen Lookout – Tennant Creek

2 The Barkly Region

The Barkly Region offers the true feel of remote Australia. It is a vast area, spreading from the middle of the Northern Territory to the eastern border shared with Queensland. Barkly is a tribute to Outback Australia, known for its sprawling grasslands and open spaces, providing a distinct sense of uninhibited freedom.

Introduction

Tourism is one of the most valuable industries contributing to the Northern Territory (NT) economy. In the NT in 2017-18 tourism contributed:

$1.2 billion

direct Gross State Product (GSP)

$1.2 billion

indirect (GSP)

9,700

direct jobs

7,400

indirect jobs[5]

Tourism has ongoing importance for the NT, being identified as one of five growth sectors in the NT Economic Development Framework (EDF).

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

Destination management planning aims to:

- Identify key strengths and assets for each region
- Recommend actions to activate opportunities, address gaps and identify potential investments in order to meet visitor demand.[6]

Tourism NT has initiated destination management planning in the NT tourism regions of:

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

The Barkly Region DMP offers a strategic, strengths-based approach to development of the tourism industry over the next 10 years.

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[5] State Tourism Satellite Account, Tourism Value to the NT
[6] Tourism NT, *NT's Tourism Industry Strategy 2030.*

The Barkly Region

The Barkly Region (the Region) is located in the central district of the NT and shares its eastern border with Queensland. It stretches over an area of 323,692 km², a space large enough to fit Tasmania four times over. The Region is home to 7,369 people, roughly 3% of the Territory's population.[7] Figure 2 shows the scale and location of the Region in the NT.

Figure 2 - Barkly Region
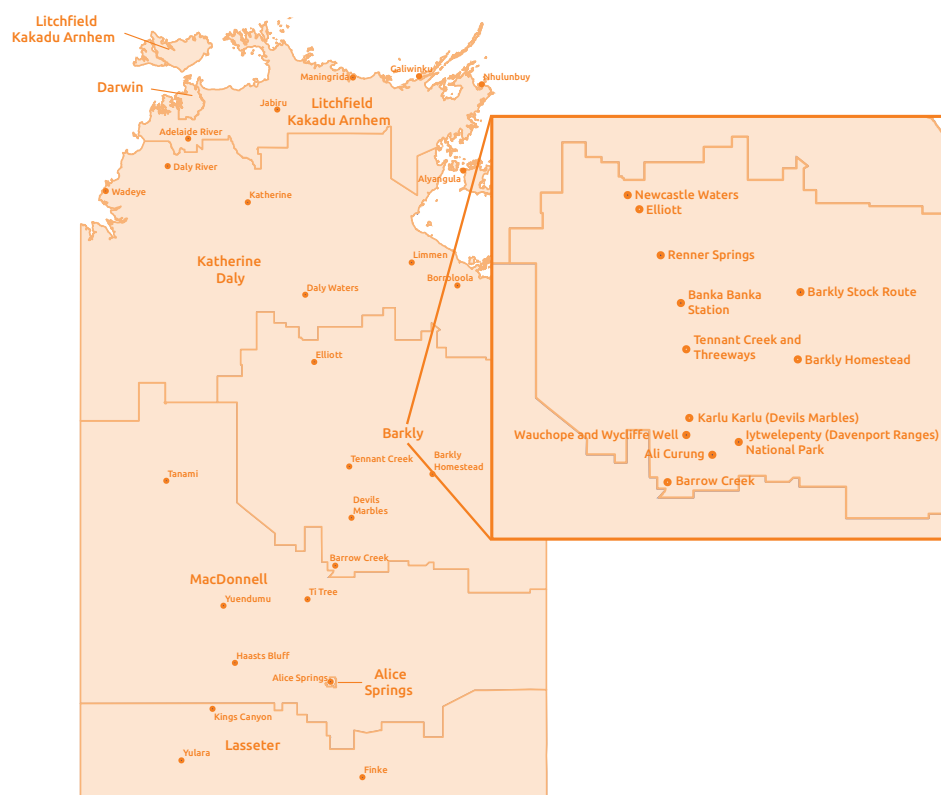
Source - *TRA, Tourism Regions Maps, NT*

Socio-economic profile

The Region hosts a relatively small population and like the wider NT, is challenged by limited population attraction and retention, as seen in the Region's estimated resident population decline of 0.8% between 2016 and 2019.[8]

The residential population is relatively young, with a median age of 29 years, compared to 32 for the Northern Territory and 38 for Australia.[9] The Region also has a significant Aboriginal population making up 54.4% of the community.[10]

The Region has experienced negative economic growth over the past five years from FY 2015 to 2019 with a decline in Gross Regional Product (GRP) of 17.4% over the period.[11] For the YE 2019 GRP for the Region totalled $360 million.[12] This negative growth trend coupled with an opportunity to diversify the economic profile, warrants efforts to develop the Region's tourism economy.

According to economy.id, the leading industries in the Region in 2018/19 by value include:

- Agriculture, forestry and fishing ($57.5 million in value added to the Region)

- Public administration and safety ($47.6 million, value added to the Region)
- Mining ($38.6 million value added to the Region).[13]

Comparatively, Tourism Research Australia, which considers the broad economic impacts of tourism across the economy, highlights that the tourism industry added approximately 14% of GRP ($50 million) and employed roughly 300 people (directly and indirectly) in 2017/18[14] which equates to roughly 10% of the Region's workforce.[15]

The Region is characterised by a youthful and culturally diverse populace, lower educational attainment outcomes than the wider NT, and limited industry diversity. The tourism industry presents a significant social and economic development opportunity for the Region.

More detailed information discussing the Region's socio-economic profile can be found in Appendix B.

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7 Profile.id, *Barkly Regional Council LGA.*
8 Ibid.
9 Australian Bureau of Statistics, *2016 Census QuickStats: Barkly.*
10 Ibid.
11 Economy.id, *Barkly Regional Council LGA.*

12 Ibid.
13 Economy.id, *Barkly Regional Council LGA.*
14 Tourism Research Australia, *Regional Tourism Satellite Accounts: Barkly.*
15 Economy.id, *Barkly Regional Council LGA.*

Tourism offerings in the Region

Barkly is known for its agricultural experiences, history and heritage, geological features and Aboriginal culture. Barkly is a genuine outback area and its history has shaped the Region. Compared to other regions in the NT, Barkly is a lesser known tourism destination, with visitation typically related to transit in the Territory, focused in the Region's most populace town, Tennant Creek.

Agricultural experiences

The Barkly Tablelands are home to vast cattle stations with areas comparative to the size of small European countries. These unique destinations, with long histories from the late 1800s, offer rich tourist experiences. Cattle stations are complemented by the Region's roadhouses that were often originally built to provide goods and services for the stations and contribute to the Region's broader history and heritage experience.

Destinations of the Region

The Region is home to several key tourism locations including:

- **Banka Banka Station**
- **Barkly Homestead**
- **Barkly Stock Route**
- **Barrow Creek**
- **Binns Track**
- **Elliott**
- **Iytwelepenty (Davenport Ranges) National Park**
- **Karlu Karlu (Devils Marbles) Conservation Reserve**
- **Newcastle Waters**
- **Renner Springs**
- **Tennant Creek**
- **Threeways Roadhouse**
- **Warrabri (Ali Curung)**
- **Wauchope**
- **Wycliffe Well.**

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

History and heritage

The Region has a rich history in gold mining, dating back to the 1930s. The Battery Hill Mining Centre is an important historic site, and a key attraction and tourism experience for visitors. The site also offers significant potential for tourism development, with a feasibility study currently underway considering all possible options for development at the site.

Barkly is also home to three historical reserves paying homage to the pioneering history of the Region, including:

- Attack Creek Historical Reserve
- Barrow Creek Telegraph Station Historical Reserve
- Tennant Creek Telegraph Station Historical Reserve.

In addition, a variety of museums and sites in the Region recognise the settlement and war history of the Territory, offering information, insights, and historical experiences, exhibits, displays, signage, walks, buildings and tours.

Geological features

One of the Region's most recognisable attractions is Karlu Karlu, or the Devils Marbles Conservation Reserve, where large granite boulders associated with Aboriginal Dreaming stories can be seen. These boulders are a well-known symbol of the Australian Outback, and a key visitor attraction in the Region. In addition to Dreaming stories, the site is also important in Aboriginal culture as the meeting place of four different language groups, each with spiritual connections for the area.

Other natural scenery can be viewed in the Iytwelepenty/Davenport Ranges National Park, where visitors can experience nature, swimming, four-wheel driving, (via the Binns Track) and history and heritage sights.

Aboriginal culture

The traditional lands of the Warumungu, Kaytete, Warlpiri and Alyawarra people exist in the Barkly Region. Their continuing connection to land and culture provide many opportunities for Aboriginal tourism development. Current Aboriginal tourism offerings in the Region are delivered through the Nyinkka Nyunyu and Arlpwe Art and Culture Centres.

Karlu Karlu / Devils Marbles Conservation Reserve

Tingkkarli / Lake Mary Ann

3 Destination management planning

The Barkly Region 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 enable a holistic and strategic approach to 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, plan to achieve the industry's desired future, and manage the desired outcomes for a destination.

The Barkly Region DMP presents an important opportunity to engage in long term planning for the sustainable growth of the industry in the Region.

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 fabrics of a community, by considering tourism growth holistically, through a regional lens and over a long-term timeframe.

The guiding approach utilised in the development of the Barkly DMP includes:

* Defining the destination and its access points
* Understanding the market and offerings
* 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* (the Strategy) highlights the value of investment in key 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 products and regions which have the capacity to drive visitation, is a core tenant of the Strategy.

The Strategy highlighted the need for DMP 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.[16]

The Barkly DMP identifies several priorities and opportunities for:

* The development of new product and experiences
* Infrastructure investments that will aid tourism development
* Gaps in industry capability.

The Region's DMP will serve as a guiding document to support the sustainable growth of the tourism industry.

Collaboration in destination management

Multiple governing bodies and authorities have an interest and role in the development of tourism in the Region 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 avoid 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. Key stakeholder groups included:

* Barkly Regional Council
* Julalikari Aboriginal Corporation
* Barkly Arts
* Central Lands Council
* Indigenous Land and Sea Corporation
* NT Department of Infrastructure, Planning and Logistics
* NT Department of the Chief Minister & Cabinet
* NT Department of Industry, Tourism and Trade
* NT Department of Environment, Parks and Water Security.

A range of guidelines, plans and agreements establishing the vision, focus and plans for destinations in the Region have been considered in this study, to identify opportunities to leverage collective action, and support the strategic investment and allocation of resources in the Region.

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[16] Tourism NT, *NT's Tourism Industry Strategy 2030.*

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 of existing tourism strategy documents, such as the *NT's Tourism Industry Strategy 2030, Northern Territory Aboriginal Tourism Strategy 2020-2030,* plus regional municipal plans, Parks and Wildlife NT park management plans and visitor experience plans were examined. Through a combination of document review and desktop research, an understanding of the current state and strategic directions in key destinations in the Territory was established. This provided a basis to commence destination management planning and align the approach of the DMP with existing strategies.

To build on the baseline data established in the early stages of the process, stakeholders were engaged with via a combination of surveys, phone calls, one-on-one interviews, and workshops across the Region. A summary of the stakeholder consultation process and outcomes is detailed in Chapter 5.

The consultation phase provided key insights of stakeholders from the tourism industry and other supporting industries, including government and community representatives. This input provided a check on the early insights gained through desktop research and confirmed the priorities of stakeholders in the Region.

Following consultations, demand data from ReviewPro, 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.

A Spinifex Pigeon on a termite mound – Barkly Region

Battery Hill Mining and Visitors Centre — Tennant Creek

4 Trends in regional tourism

Regional tourism has gained in popularity in recent years, with travellers increasingly seeking authentic, cultural, and nature-based tourism experiences. The Barkly Region can capitalise on this trend to develop its tourism industry.

Introduction

Trends in regional tourism in Australia highlight an opportunity for the Barkly Region to leverage its available assets to meet the market's high demand for unique, authentic, cultural, and natural experiences.

Yet caution should be applied when considering opportunities in visitation trends, with several barriers to building the tourism industry remaining for the Region, including competition with capital cities in attracting visitors, and the significant investment in both time and expense required to visit the Region.

Over the next 10 years the tourism industry in the Region could focus its efforts on leveraging its natural, cultural and historical assets to maximise the benefits from current travel trends. Investment in festivals and relevant events to drive visitation to the Region also presents an opportunity to build value in the tourism market.

NOTE: The tourism trends discussed in this chapter are based on information and data prior to COVID-19. Due to COVID-19, it is expected that the short to medium term trends in the Australian tourism industry will be impacted, creating disruption and changes in visitor demand and preferences. Accordingly, it will be critical to review shifting trends across the life of the DMP.

General trends in regional tourism

Low exchange rates, low inflation, 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.[17]

Additionally, the number of international visitors grew 2% in 2019, with international visitor spending also reaching a record, at $45.4 billion.[18]

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

Asia contributed 88% of the $1.5 billion in tourism spend gained in 2019 from 2018, and 69% of the 185,000 visitor increase.[18] The increasing number of Asian visitors are placing greater importance on experiences and cultural immersion.[20]

The youth market has shifted tourism demands, through a greater use of low-cost carriers, lower patronage of traditional hotel accommodation, and lower average daily spend. They have also caused a higher demand for authentic tourism experiences.

The Region's proximity to Asia, unique natural environments and Aboriginal tourism capacity presents significant opportunities for access by 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.

A recent study examining regional dispersal in Australia[21] found that among a set of traveller cohorts investigated, those most likely to visit regional destinations in Australia (in order of demand) include:

- Family road trippers, domestic travellers (62% travelled to regional Australia on their most recent trip)
- Traditional international market Gen Y and Z, on their first trip to Australia (59% travelled to regional Australia on their most recent trip)
- Affluent 55+ Australians (56% travelled to regional Australia on their most recent trip).

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

- The Asian marketing visiting friends or relatives (VFR) (19% travelled to regional Australia on their most recent trip)
- Festival and event goers, (34% travelled to regional Australia on their last trip)
- The Asian market Gen Y and Z (41% travelled to regional Australia on their most recent trip).

The study identified that the common motivators influencing those that did not travel to regional destinations on their most recent trip included:

- 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, which was related to shopping, dining and a greater range of experiences
- For domestic travellers a preference for overseas destinations
- For international travellers (particularly Chinese) a lack of knowledge about regional Australia was a key barrier to dispersal.

The Region's annual Desert Harmony Festival is an example of a successful event in the Region, promoting the Region and its arts and cultural offerings, and attracting on average 5,000 locals and visitors annually.

[17] Tourism Research Australia, *Travel by Australians year ending December 2019*.
[18] Tourism Research Australia, *International visitors in Australia year ending December 2019*.
[19] Ibid.
[20] Tourism and Events Queensland, *Queensland Asia Tourism Strategy 2016-2025*.
[21] Deloitte Access Economic, 2019, Understanding visitor regional dispersal in Australia.

Festival 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 those travellers who prioritise festivals, events and sports when they travel, 34% had travelled to regional destinations in Australia on their most recent trip. For this group, sporting events were the most frequent draw card.[22] 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 Region's annual Desert Harmony Festival is an example of a successful event in the Region, promoting the Region and its arts and cultural offerings, and attracting on average 5,000 locals and visitors annually.[23]

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. This can include visiting an Aboriginal site or community, experiencing an Aboriginal art, craft or cultural display, or attending an Aboriginal performance.

Demand for Aboriginal tourism is rising sharply, 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.[24]

Across regional Australia, the NT regions including Lasseter, MacDonnell, Litchfield Kakadu Arnhem, Big Rivers, and Alice Springs recorded the highest proportion of international Aboriginal tourism visitor nights. These markets present a key opportunity for the development of the Region's Aboriginal tourism offering.

Aboriginal tourism visitors are important for driving demand, but also for their comparative value. These visitors typically stay longer than other international visitors and spend substantially more ($7,286 per visitor compared to $4,792).[25]

The demand, value and existing capability to support Aboriginal tourism in the Region establishes the importance of ongoing investment in this tourism sector. The long-term growth trends for visitors seeking authentic cultural experiences suggests this opportunity can be sustained over the long-term, warranting a substantive development and investment timeframe.

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."[26] 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.[27] Nature-based and bucket list holidays were the second and third most popular reasons for visiting regional destinations in Australia amongst international visitors.

Of international visitors, 'nature-based and/or other outdoor activities' was listed in the top five reasons for visiting regional Australia for the 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.[28]

Australia is widely recognised for quality nature-based travel experiences, being rated as the number one country globally for nature and wildlife by international travellers.[29]

This brand presents an opportunity for the Barkly Region to leverage, as it is already known for its geological features and has the potential to further develop nature-based tourism. With Australian terrestrial reserves including National Parks receiving over 1.47 million visitors in 2017-18, an increase of 6.5% from the prior year,[30] and broad national and international demand for this experience, a focus on development of the Region's nature-based offerings is warranted.

Key findings

Trends in regional tourism in Australia highlight the importance of leveraging the authenticity of the Region, presented through its cultural, historical and heritage, and nature-based assets, to support the sustainable growth of the industry and maximise visitor market value. The trends also point to the importance of different approaches to growth by the industry, such as targeted visitor attraction, focused on those likely to disperse to regional areas, and strategic investment in eco-tourism.

[22] Deloitte Access Economic, 2019, Understanding visitor regional dispersal in Australia.
[23] Barkly Regional Arts, Desert Harmony Festival.
[24] Tourism NT, Combined Snapshot Year Ending September 2019.
[25] Australian Government Department of Foreign Affairs and Trade, Indigenous Tourism Surge. https://dfat.gov.au/about-us/publications/trade-investment/business-envoy/Pages/january-2019/indigenous-tourism-surge.aspx

[26] EcoTourism Australia, Nature Based Tourism in Australia Manifesto.
[27] Deloitte Access Economics, Understanding visitor regional dispersal in Australia.
[28] Tourism Australia, Traveller Snapshot: Global.
[29] Tourism Australia, Traveller Snapshot: Global.
[30] Australian Government Director of National Parks, Annual Report 2017-18.

Whistleduck Creek - Iytwelepenty / Davenport Ranges National Park

Nyinkka Nyunyu Art and Culture Centre – Tennant Creek

5 Stakeholder consultation

Stakeholders identified the potential for the development of the Barkly Region as an important tourism destination in the NT. Stakeholders have a vision to develop the industry by building on the drive market, developing the destination holistically across economic and social determinants and achieving an increase in visitor multi-night stays.

Introduction

Stakeholders were engaged from the Barkly Region to co-develop the DMP. Stakeholders are identified as a critical consideration to the plan by offering:

- Relationships central to implementation of a DMP
- Insights to guide destination management planning for the Region
- Observational data of the current market, strengths and challenges to assist in the prioritisation of actions in the plan.

The diverse perspectives offered through the consultation helped to build a comprehensive understanding of the opportunities and challenges that exist for the tourism industry in the Region.

Engagement approach

Stakeholders were identified through desktop research and collaboration with government departments, local government and industry representative bodies.

Stakeholders were notified of the study via phone and email contact throughout January 2020. In February, stakeholders were consulted face-to-face in Tennant Creek, and phone interviews were available to those stakeholders affected by weather and road closures.

Qualitative data analysis methodology

Thematic analysis of notes taken during stakeholder consultation was used to identify themes and patterns in this data. Consultation analysis identified four key themes:

- Aboriginal tourism capacity
- Collaboration and coordination
- Beautification and signage
- Reputation, perception and safety.

Consultation outcomes

Recognising limitations and challenges to the Region's tourism industry, stakeholders are focused on building the industry by maximising the value obtained from the drive tourism market. Opportunities to realise this vision focus on the provision of Aboriginal tourism experiences, industry capacity building, and enhancement of the Region's image and presentation.

Aboriginal tourism capacity

Stakeholders identified the development of Aboriginal tourism capacity as a key opportunity to develop the tourism industry, with expectations that Aboriginal tourism could be developed to be a showcase product in the Region.

Three Aboriginal tourism experiences currently operate in the Region:

- Desert Harmony Festival
- Arlpwe Art and Cultural Centre
- Nyinkka Nyunyu Art and Culture Centre.

In addition, stakeholders in the Region identified a desire to develop further Aboriginal tourism offerings, including the following opportunities:

- Tours accompanying Aboriginal artists on country to view landscapes and painting demonstrations
- Demonstrations of traditional foods and medicines
- Traditional dance performances and storytelling
- Overnight camping expeditions
- Authentic cultural tours
- High-quality Aboriginal cultural experiences.

Challenges associated with the development of Aboriginal tourism products identified by stakeholders included:

- Establishment of an investment or partnership relationship with an experienced tourism operator
- Establishment of a relationship with a Traditional Owner with experience in the sector
- Securing of funding and attracting investment
- Product consistency
- Ability to scale product offerings
- Resourcing and workforce reliability challenges.

These challenges highlight the need for significant investment and secured funding from government, to support the development of consistent products, through long-term capacity building.

Land access was raised as a key issue for both new and prospective tourism operators seeking to develop both Aboriginal and non-Aboriginal tourism in the Region. These challenges included interpreting and navigating the process of land access, engagement with the Central Land Council, costs, uncertainty for investors, and length of time. These issues concerned stakeholders and stopped them from pursing development and progressing tourism opportunities.

Beautification and signage

Stakeholders identified Tennant Creek signage and town beautification projects as priorities to encourage tourism and deter anti-social behaviour, through the activation of public spaces.

Stakeholders frequently pointed to the tired appearance of infrastructure in Tennant Creek as a detractor to tourists. This challenge has been identified by government, with several projects planned to address the look and feel of the Region, including capital works upgrades to Peko Road, Patterson Street and Purkiss Reserve along with improved signage at key locations.

Collaboration and coordination

The following entities were identified as critical to enabling improved coordination for tourism development in the Region:

- Tourism Central Australia
- Barkly branch of the Alice Springs Chamber of Commerce
- Northern Territory Government agencies
- Barkly Regional Council
- Barkly Region Local Authorities
- Federal Government Barkly Regional Deal Program.

However, a lack of established mechanisms for engagement by stakeholders across these agencies, governments, and interest groups was highlighted as a key issue impeding the progression of tourism outcomes.

Stakeholders suggested a local point of contact for tourism industry development would greatly assist collaboration and reduce siloed approaches among industry stakeholders in the Region. Many stakeholders supported Tourism Central Australia playing a greater role in industry development across the Region.

The importance and need for locally based business support services was highlighted by stakeholders. They noted that following a period when the delivery of the Small Business Champions services in Tennant Creek ceased, a notable negative impact on business development was experienced in the Region.

Barkly Region tourism development strategy

Stakeholders identified key principles to guide destination planning in the Region, including:

- Exceeding visitor expectations
- Valuing the Region's culture and heritage
- Creating a safe and welcoming environment.

During the consultation, enhanced coordination, strategic planning, capitalisation on existing attractions and offerings, and the development of new products were identified as necessary actions to achieve the Region's vision.

Stakeholders identified that there is a perception among visitors there are no experiences or attractions in the Region, and as a result, the main purpose of visitation is to rest when travelling the Stuart Highway.

The unanimous aspiration of stakeholders in the Region is to extend the length of stay of visitors from one night to two or three nights.

While stakeholders identified the existing tourism offering in the Region to be suitable for extended visitors stays, it was also agreed there is potential for additional developments, by leveraging the Region's mining heritage at the Battery Hill Mining Centre, decommissioned mine and gold panning tours, and other mining activities.

Likewise, the Barkly Telegraph Station is considered by stakeholders to be integral to the Region's history. However the Telegraph Station site is currently closed and only accessible via a key obtained from the visitor's centre.

Events and festivals were identified as key opportunities for industry development. The Desert Harmony Festival is known as the Region's premier event, attracting visitors from across the Territory and Australia. The festival has recently transitioned from a multi-day event to a one-day festival, due to funding reductions, and stakeholders suggested the Region would benefit from increased funding and promotion for the event.

Other potential products identified for development include:

- Gold mine and prospecting tours
- Trails for BMX, mountain biking, 4WD and bush walking
- Bird watching stations
- Aboriginal cultural tourism experiences, including overnight camps, storytelling and traditional food and medicine exhibitions
- Station and outback performances and experiences
- Glamping.

Development of products to complement attractions across the Territory was discussed, such as cycling tracks that leverage the interest created by such offerings in Alice Springs.

The ancillary services supporting the tourism industry in the Region function well to meet the needs of visitors. For example, in Tennant Creek, several cafes, hotels and restaurants of good quality are available on the main road.

Regional identity development and careful management of visitor expectations for the Region are considered to be key to overcoming negative perceptions. Upcoming capital works projects including upgraded signage and town beautification activities will enhance the image of Tennant Creek.

Efforts to better deliver visitor information were identified as important to enhance tourism outcomes for the Region. Opportunities to achieve this include:

- Establishment of visitor information displays at entrance points to the Region to better communicate attractions and offerings
- Relocation of the Visitor Information Centre to the main section of Tennant Creek along the Stuart Highway or at town entrance points.

Enhanced marketing and experience packaging to promote the Region as a destination rather than a stopover point was identified as a priority action to increase overnight visitation. It was considered that visitors currently have limited knowledge and there are challenges in accessing information about the Region. Stakeholders promoting two/three-day regional itineraries that illustrate offerings will support the goal of the Region to increase visitor length of stay, and the establishment of a distinct identity for the Region could assist in marketing the Region.

Accessible tourism

During consultations, stakeholders were prompted to consider opportunities to engage with the accessible tourism market. While stakeholders were aware of the importance of accessibility to engaging a diverse cohort of visitors, this was not identified as a priority for action.

Chapter 6 provides evidence that there are potential industry benefits to be achieved through the development of accessible tourism. A discussion on accessible tourism considerations is provided in Appendix F.

Key findings

The consultation process confirmed that developing the tourism industry and promoting the Region requires a collaborative approach to enhance the Region's image, coordinate marketing and communications, and develop capacity of the industry to deliver enhanced visitor experiences.

Extending the length of stay in the Region is the key priority of tourism industry stakeholders, including having visitors stay in Tennant Creek rather than camp along roadside rest stops.

This priority requires collaborative strategic planning to address the perception of Tennant Creek being unsafe.

Key priorities for investigation and action in the DMP identified through the stakeholder consultation process include:

- Aboriginal tourism capacity building, to enhance the quantity of available products and experiences in the Region
- Delivery of business and industry support services locally
- Development of new products, such as adventure sports and gold prospecting
- Expansion of the Desert Harmony Festival to positively market and promote the Region
- Revitalisation of the central streetscape of Tennant Creek
- Relocation of the Tennant Creek visitor information centre to a central location
- Addressing the issue of safety and desirability of Tennant Creek as a place to visit
- Improved marketing and communication of the Region's experiences and attractions
- Enhanced coordination and collaboration among stakeholders.

Arlpwe Art and Cultural Centre – Warrabri / Ali Curung

Barrow Creek Telegraph Station Historical Reserve – Barrow Creek

6 Visitor market analysis

The Barkly Region is an important destination for the domestic drive market, being a key transit destination for travellers in the NT. Building on this market and the high satisfaction of visitors with the cultural and mining heritage attractions in the Region presents a clear opportunity for the industry.

Introduction

Consideration of visitor demand insights for the Region was obtained through software that collects 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

Over the period 2017 to 2019, the Region received on average 125,000 annual overnight visitors, 89% of which are domestic.[31] In this period, the top source markets of international visitors to the Region were Germany, France and the United Kingdom.

Like other regions in the Territory, the drive market is extremely important for the Region, as indicated by the high proportion of visitors who arrive by private vehicle, rental car or motorhome/campervan (78%).[32]

Of all domestic visitors to the Region, almost half (47%) are self-drive leisure travellers, meaning the purpose of their visit is to holiday or to see friends or relatives. The domestic leisure drive market typically has short lengths of stay, with 88% staying three or fewer nights.[33]

International travellers who visited the Barkly Region mostly entered the country through a different state or Territory to the NT, before travelling to the Region, with less than one in five (17%) entering the country through Darwin, and Sydney being the most common entry point. However of the international travellers who visited the Region, 73% also visited Greater Darwin, highlighting the importance of regional collaboration in tourism industry development.[34]
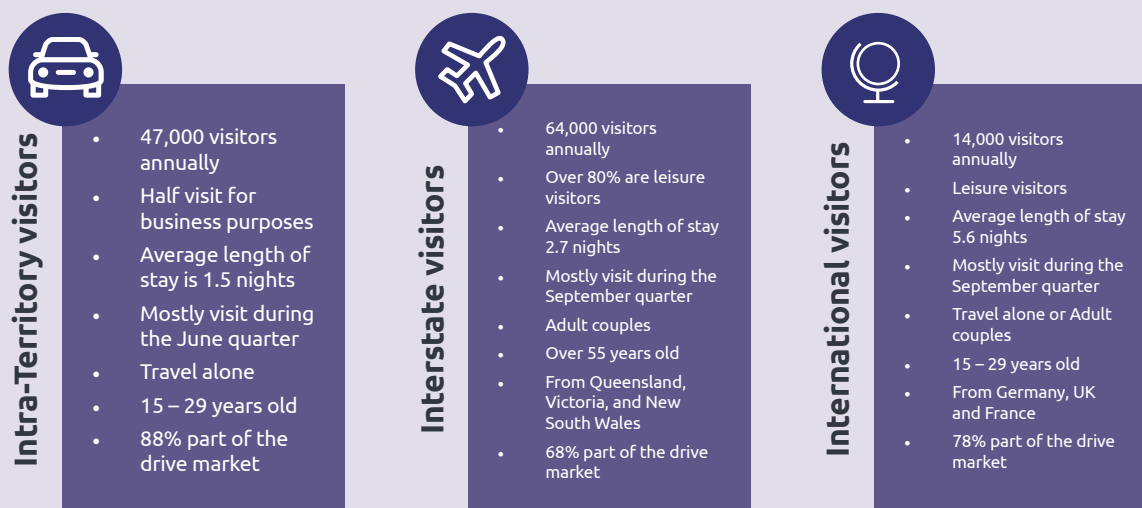
Tourism contributed $50 million to the Barkly economy (measured as GRP) in 2017/18 (up from $43 million the year before), resulting from total tourism consumption of $113 million in the Region. Consumption trends indicate the significance of the tourism drive market to the Region, with the highest consumption seen in the categories of long-distance passenger transportation, takeaway and restaurant meals, fuel and accommodation.

Of visitors to the Region, persons visiting for business made up 33% of the total market over the three years from 2017 to 2019.[35] Of the business travellers to the Region almost all are domestic travellers.[36] On average business travel in the NT involved a stay length of 4.6 nights in 2019[37], this compares to the average length of stay of all domestic visitors to the Barkly Region which averaged 2.2 nights for the period from 2017 to 2019.[38]

Youth, Backpacker and Working Holiday Maker (WHM) data shows 21% of the total visitors to the Region are within the youth (15-29 years old) sector. The majority were leisure travellers as the Region, does not offer work favoured by WHM's.

Figure 3 below discusses attributes of the three visitor markets for the Region, and more information on the visitor market can be found in Appendix D.

Figure 3 - Barkly visitor profile

Intra-Territory visitors
- 47,000 visitors annually
- Half visit for business purposes
- Average length of stay is 1.5 nights
- Mostly visit during the June quarter
- Travel alone
- 15 – 29 years old
- 88% part of the drive market

Interstate visitors
- 64,000 visitors annually
- Over 80% are leisure visitors
- Average length of stay 2.7 nights
- Mostly visit during the September quarter
- Adult couples
- Over 55 years old
- From Queensland, Victoria, and New South Wales
- 68% part of the drive market

International visitors
- 14,000 visitors annually
- Leisure visitors
- Average length of stay 5.6 nights
- Mostly visit during the September quarter
- Travel alone or Adult couples
- 15 – 29 years old
- From Germany, UK and France
- 78% part of the drive market

Source: Tourism NT, *Regional Profile Barkly, YE June 2017-2019*

31 Tourism NT, *Barkly Regional Report, Year Ending June 2017-2019*.
32 Ibid.
33 Ibid.
34 Ibid.

35 Tourism NT, *Barkly Regional Report 2017-2019*
36 Ibid
37 Tourism Research Australia, *Domestic Business Visitors, 2019*.
38 Tourism NT, *Barkly Regional Report 2017-2019*

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, national operators and trade partners and Tourism Australia 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.

ReviewPro data analysis

Tourism NT has utilised ReviewPro's reputation management tool to gather data about the Region. ReviewPro data shows that visitors to the Region have an overall positive experience.

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

ReviewPro further breaks down online reviews into key categories relating to service, staff and value.

Reviews of hotels, tourist spots, and operators in the Region are mostly positive, with 74% of mentions rated as positive, and an overall GRI of 78%. This measure can be compared against the Tourism and Events Queensland benchmark for operators to be listed in the best of Queensland experiences at a GRI of 80.

Notably, in responses to the question "would recommend the spot", 96% of respondents confirmed they would.

Almost half of the online review data collected from ReviewPro came from those travelling as a couple, (48%), with almost a quarter of reviews from those travelling in a family group (23%), and the balance split across those travelling alone (14%), and those travelling in groups, for business, and other categories.

The Barkly Region GRI reflects feedback relating to 14 establishments/places and experiences in 2019. The total number of establishments considered in the GRI is notably lower than the number of establishments in the Region. Without adequate representation of establishments in the data collection process the ability of the tool to support industry development is diminished.

There were 1,286 reviews during this timeframe, which was an increase of 182 from the previous year.

NT destination satisfaction research

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

A mean score of 5.2 for overall satisfaction (on a 7-point scale) was recorded for the Region, with interstate visitors generally giving slightly higher satisfaction ratings than international visitors.

The feedback on the Barkly Region highlighted that:

- For most, Tennant Creek was a transit destination
- The Nyinkka Nyunyu Art and Culture Centre and Battery Hill Mining Centre are highly rated by visitors
- Visitor satisfaction for camping and caravan parks, and food was positive
- Opportunities to expand dietary offerings and provide bush tucker were identified by respondents.

Key findings across the NT highlight that:

- The warmth and hospitality of the people visitors met on their journey was considered to be 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
- 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 the Region's Parks, but highlighted the need for upgrades in Parks
- Most people want to experience authentic Aboriginal culture
- Staff hospitality was appreciated across NT
- While most people love caravan park experiences across the NT, variability was noted.

National operator feedback

A range of national operators were engaged to obtain feedback and insights on market demand in the Region and across the NT. Operators engaged included:

- Voyages Indigenous Tourism
- Journey Beyond
- Qantas
- Accor
- AAT Kings
- Tourism Australia.

Feedback highlighted the importance of nature and wildlife as well as authentic Aboriginal tourism experiences to the visitor market, and the potential to deliver these experiences across the Territory.

Operators identified opportunities to enhance destination marketing in the Territory, by leveraging the scale of marketing investment from Tourism NT and national operators with larger marketing budgets, such as Qantas.

Operators pointed to the success of Nitmiluk Tours, and the opportunity this offers to develop a model to guide the Aboriginal tourism product development across the Territory.

Accessibility to the Territory was another key issue, which is considered to be an area as a key role for government in attracting and supporting sustainable aviation capacity to the NT to improve access.

Opportunities to advance the industry through the development of contemporary products (e.g. dining), and the quality of accommodation in the Territory was highlighted by operators.

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 visitors to the Territory. Key themes arising from the feedback included:

- Flights
- 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 to the NT. 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.

Additionally, the expense and availability of domestic flights is a barrier for these markets. For example, the UK market has shown interest in travelling to Alice Springs from Perth but limited flight options for this route is a barrier to uptake. Domestic flights from another capital city to Darwin or to Alice Springs have restrictive costs, reducing the NT's competitiveness within Australia. Flight arrival and departure times to Darwin were also identified as a discouraging factor for these markets.

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 also causing shorter stays in Australia. When visitors have limited time, it is understood that they typically avoid visiting the NT.

For some markets like the US, visitors plan their trips around seeing several "iconic" Australian destinations including Sydney, the Great Barrier Reef and Uluṟu, in a short period of time. This has caused short lengths of stay at Uluṟu and means visitors do not disperse from there, but rather move on to the next destination.

Notably, repeat visitors are more likely to visit regional destinations and seek 'off the beaten track' experiences, highlighting an opportunity for the Region. In the German market, the share of first-time visitors to Australia has decreased while the share of repeat visitors has increased. There are opportunities to increase visitation to the NT, particularly for the self-drive market and to promote Explorers Way.

Seasonality may be another barrier to attracting visitors, particularly in Summer and the Top End's wet season, the most common period of overseas travel by the British market (November to April). While the Barkly Region does not have the same weather patterns as the Top End, much of Barkly's visitation is the drive market who either start or end in Darwin, so seasonality may still affect Barkly's visitation.

Destination awareness

The Barkly Region has limited destination awareness. Additionally, no trade partner starter packages for working holiday makers (WHMs) are offered for Darwin, creating a barrier to visitation in the Region. However, awareness of the Red Centre as a bucket-list destination is high, presenting an opportunity to leverage this market if travelling through the NT.

It is notable that the Territory typically performs better when promoted in conjunction with unique products like The Ghan, or with travel in other states which offer contrasting experiences, such as the Explorers Way drive from Adelaide to Darwin.

In the competitive global tourism market, increased marketing sponsorship is vital for building the attractiveness of the NT's tourism opportunities. It was considered that this is most effective when partnering with large, volume-producing partners.

Product offering

Improvements in product offerings and developed products such as Aboriginal tourism, have been made across the Territory. There is a view that value for money in the NT is lower than in other destinations in Australia. New glamping facilities and accommodation options in the Territory were recognised as improvements, however some key destinations are still seen to lack product offerings, particularly luxury accommodation. 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 key 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 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
- Have above average trip expenditure, including likelihood to stay longer and disperse further.

When choosing a destination, the most important factor of the 11 key 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, cuisine and local produce
- Friendly and open citizens, local hospitality.

High-value travellers had the same top five drivers, but in a different order. For this market, 'world class nature and wildlife' is the most important factor.

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

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

The survey confirms that Australia is most strongly associated with nature and history experiences. Of the select Australian destinations ranked for their association with these experiences, three destinations in the NT were included in their ranking listed below:

Table 6 - Associations for NT destinations

	Association with nature and wildlife	Association with history & heritage
Kakadu	4th	7th
Uluṟu	7th	3rd
Darwin	15th	13th

In terms of net promoter score, Kakadu National Park had the highest of all Australian destinations, Uluṟu ranked third after Kangaroo Island, and Darwin ranked seventeenth. Notably destinations in the Territory were all ranked higher among domestic travellers.

The CDP included a test of 20 Australian and 20 international experiences, with respondents viewing 4 randomly selected experiences from each offering. Two of the experiences tested that related to the NT included: experiences in Nitmiluk National Park; and The Ghan Expedition Rail Journey (Ghan). When comparing traveller preferences, the Ghan and experiences in Nitmiluk National Park were valued more highly by domestic travellers than international travellers as shown in Table 7.

Table 7 - Traveller rankings of The Ghan and Nitmiluk experiences

Traveller	Ghan	Nitmiluk
Domestic	13	23
High value international	17	36
General international	21	38

For the Ghan experience, the highest ranked attractions for domestic and international travellers included the landscape, train experiences and day trips. For experiences in Nitmiluk National Park, the key attractions included cruising the Gorge; stories of the Jawoyn people; and the leisure and hospitality experiences.

CDP results indicate that in particular, experiences in Nitmiluk National Park had low appeal to both the general international and high value international markets.

The findings of the CDP highlight the value of investment in tourism experiences that promote the natural, history and heritage experiences in the Region.

Accessible tourism

Limited data is 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 other states in Australia. In Queensland, domestic travellers with a disability accounted for 8% (289,000) of the Queensland adult population, and the average travel party size for a visitor with a disability was 2.3. When including children, the domestic accessible tourism market accounts for 13% (657,000) of Queensland's total population. Estimated spend for travel parties including a person with disability was $1.9 billion, roughly 10% of total domestic spend in Queensland.[39]

Similarly, travellers with a disability represented 7% (349,000) of Victoria's adult population, and the average travel party size was 2.2, accounting 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, accounting for 10% of total domestic spend in Victoria.[40]

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

Accessible tourism has added relevance for the Region due to its high proportion of self-drive travellers which include cohorts that benefit from greater levels of accessibility, including families with children, 86% of who choose to travel by private vehicle[41], and older non-working travellers, 81% of which also self-drive.[42]

Key findings

Visitation to the Region is overwhelmingly driven by domestic visitors travelling to the Region by vehicle.

The data collected in the visitor market analysis highlights that strengths of the Region include:

- Accessibility for the drive market
- Aboriginal art and cultural experiences
- Mining history and heritage offerings.

Weakness and challenges to increasing demand include:

- Poor safety perceptions and anti-social deterrents
- The attractiveness and accessibility of the Region to international markets
- Limited scale and capacity in the Region's tourism industry to market the destination and generate growth.

The visitor market insights highlight that opportunities to support growth in tourism in the Region include:

- Promoting the Region in conjunction with other regions in the Territory, by leveraging large marketing operators and Tourism NT
- Enhanced marketing to build regional identity awareness, address safety concerns, and improve travel planning
- Enhancement of the quality of, and expansion of high demand offerings including authentic Aboriginal tourism, history and heritage, and nature-based experiences.

The Barkly is well-placed to leverage the Region's existing Aboriginal tourism and history and heritage products to attract visitors, with authentic cultural experiences being a key factor motivating travel to regional areas in Australia. The Territory is already well recognised for its history, heritage and cultural offerings.

Investment in road infrastructure and services to support and build the domestic drive market visiting the Region also presents an opportunity to support development of tourism in the Region.

[39] Tourism Research Australia, *Accessible Tourism in Victoria and Queensland*.
[40] Ibid
[41] Tourism Research Australia, Families with Children.
[42] Tourism Research Australia, Older non-working travellers

Tennant Visitor Information Centre - Battery Hill

Appendix A - Product development opportunities

In consultation with stakeholders and through analysis of established plans for development across the Barkly Region, the following product development opportunities have been identified to support sustainable tourism development in the Region.
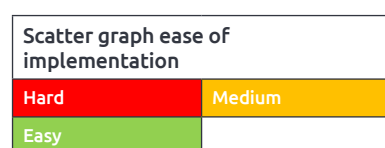
Drivers of demand versus Importance to destinations development

Scatter graph ease of implementation	
Hard	Medium
Easy	

	Chart Ref	Product opportunities	Product status	Level of stakeholder support	Current status	Estimated scale of investment	Possible action
Newcastle Waters	1	Establish birdwatching infrastructure	New	Concentrated	Identified opportunity	Low	Concept planning
	2	Develop off highway campground facilities with historic/cultural product offering	New	Concentrated	Identified opportunity	Medium - High	Site inspection and planning
Banka Banka Station	3	Develop Aboriginal arts and cultural product offering including campfire storytelling	New	Concentrated	Identified opportunity	Low	Market assessment
	4	Enhance accommodation options and services	Existing	Concentrated	Identified opportunity	Medium - High	Market assessment
	5	Develop new walking trail including signage	New	Concentrated	Identified opportunity	Medium	Market assessment
Tennant Creek	6	Develop mining history experiences and products	New	Broad	Identified opportunity	Low - Medium	Market assessment
	7	Enhance Nyinkka Nyunyu Art and Culture Centre infrastructure and establish Aboriginal cultural tours and immersion	New	Concentrated	Identified opportunity	Medium	Market assessment
	8	Establish new bicycle trails and tracks (including mountain bikes and BMX)	New	Concentrated	Identified opportunity	Medium	Market assessment
	9	Establish new 4WD trails	New	Concentrated	Identified opportunity	Low - Medium	Market assessment
	10	Establish bird watching infrastructure	New	Concentrated	Identified opportunity	Low	Market assessment
	11	Invest in Tennant Creek beautification (including parks and gardens)	Existing	Extensive	Planned activity	High	In progress
	12	Establish contemporary visitor information centre facilities	Existing	Concentrated	Study in progress	Medium – high	In progress
	13	Establish state of the art facilities at Battery Hill Mining Centre site (informed by existing scoping study)	New	Extensive	Study in progress	High	Market assessment
	14	Establish and improve quality accommodation offerings in Tennant Creek	Existing	Extensive	Identified opportunity	High	Market assessment
	15	Lake Mary Ann upgrade of facilities including children's playground	Existing	Extensive	Planned activity	High	Commenced
	16	Enhance visitor amenities at Lake Mary Ann with possible accommodation offerings	Existing	Extensive	Identified opportunity	High	Market assessment
Threeways	17	Install and upgrade wayfinding signage at Threeways	Existing	Concentrated	Identified opportunity	Medium	Include in Drive Market Strategy
Karlu Karlu	18	Enhance the overnight facilities at Karlu Karlu / Devils Marbles Conservation Reserve in consultation with the Traditional Owners	New	Concentrated	Identified opportunity	High	Business case
Elliott	19	Develop wayside stop facilities	New	Concentrated	Identified opportunity	Medium	Site inspection and planning
Barkly Region	20	Enhance facilities on the Binns Track experience	Existing	Concentrated	Identified opportunity	Medium	Include in Drive Market Strategy
	21	Enhance facilities at wayside inns established throughout Region	Existing	Concentrated	Identified opportunity	Medium - High	Market assessment
	22	Develop Stuart Highway WWII and pastoral history journey experience	Existing	Concentrated	Identified opportunity	Medium	Market assessment
	23	Develop night time tourism experiences	Existing / New	Extensive	Identified opportunity	Low – medium	Market and feasibility assessment
	24	Increase and/or revitalise regional events (including sporting events)	Existing	Concentrated	Identified opportunity	Medium	Market assessment
	25	Improve regional and remote art centre / Arts Trail products in the Region	Existing	Extensive	Planned activity	Medium	Grants and funding initiative
	26	Install and upgrade wayfinding signage across Region	Existing	Broad	Identified opportunity	Medium	Include in Drive Market Strategy
	27	Develop multi-day itinerary self-drive options for the Region	Existing	Extensive	Planned	Low	In progress

Legend	Level of stakeholder support		Estimated scale of investment ($AUD)	
Nature-based offerings	Concentrated	Local community, individual or single Govt. agency	High	+1 million
Aboriginal cultural offerings	Broad	Community + others, or multiple agencies	Medium	0.1 – 1 million
Drive – journey offerings	Extensive	Community, Govt., multiple agencies and/or industry	Low	0 – 100,000
History and heritage offerings				
Quality facilities				

Barrow Creek Telegraph Station Historical Reserve – Barrow Creek

Appendix B - Socio-economic profile

Population profile

The population profile for the Barkly Region highlights a youthful and culturally diverse community. In 2018 the estimated resident population across the Region was 7,392.[43] Like the rest of the NT, population attraction and retention is a challenge for the Barkly, which experienced a population decline of 2.5% between 2011 and 2016.[44]

Barkly has a young population, with a median age of 29 years, compared to 32 for the Northern Territory and 38 for Australia.[45] The Region also has a significant Aboriginal population making up 54.4% of the community.[46]

Education and labour

Educational attainment in Barkly is overall lower than the Northern Territory as a whole, and again lower than the Australian average. Of people aged 15 and over, year 12 was the highest level of educational attainment for 8.7%, compared to 12.7% for the NT. Notably the number of people aged 15 and over holding a bachelor degree represents 8.1%, a much lower figure than the NT at 17.1% and Australia at 22.0%.[47]

Barkly's labour force was 2,965 people in 2016, up from 2,015 in 2011. 12.7% of the labour force reported being unemployed, compared to 7.0% in the Territory and 6.9% in Australia.[48]

Income

The 2016 overall median household income in the Barkly was $1,281. This is lower than the NT median income of $1,983 however, weekly median rent is just $75 in Barkly, significantly lower than the NT median weekly rent of $315. Similarly, the median monthly mortgage repayment is $1,200 in Barkly, compared to $2,167 in the Territory.[49]

Economic profile

Barkly's GRP was $0.36 billion in the year ending June 2019. This represented a decline of 4.1% from 2018. The largest employment industries in the Region include:

- Public administration and safety (17.9% of jobs)
- Health care and social assistance (14.4% jobs)
- Education and training (12.1% jobs)
- Agriculture, forestry and fishing (12.1% of jobs).

From 2013/14 to 2018/19 the construction industry grew, employing an additional 103 local workers.

Agriculture, forestry and fishing added nearly one fifth of the Region's value in 2018/19 at $57.5 million or 19.3% of the total value added to Barkly's economy. Other top industries were:

- Public administration and safety ($47.6 million, 16.0%)
- Mining ($38.6 million, 13.0%)
- Health care and social assistance ($37.8 million, 12.7%).

In 2018, there were 211 registered businesses in Barkly, up from 194 in 2017. Construction accounted for 15.6% of the registered businesses.[50]

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[43] Profile.id, *Barkly Regional Council LGA.*
[44] Ibid.
[45] Australian Bureau of Statistics, *2016 Census QuickStats: Barkly.*
[46] Ibid.
[47] Ibid.
[48] Economy.id, Barkly Regional Council LGA.
[49] Ibid.
[50] Ibid.

Four-wheel driving the Red Centre – Barkly Region

Appendix C - Key location descriptions

Tennant Creek

Tennant Creek is a town of 3,000 located on the Stuart Highway, the main road connecting Darwin and Alice Springs. Tennant Creek is approximately 500 km north of Alice Springs and can be reached by car in about five hours from Alice Springs. Roughly a quarter of the population is Australian, while another quarter is Aboriginal. Other common ancestries are English, Irish, and Scottish. Other than English, Warumungu and Warlpiri are commonly spoken languages. The top industries of employment are government administration, hospitals, and primary education.[51]

Tennant Creek has a rich history shaped by gold mining, Aboriginal culture, and the Territory's original cattle kings. The gold rush hit Tennant Creek in the 1930s, and today tourists can fossick for gold, take an underground tour at the Battery Hill Mining Centre, and explore gold mining artefacts at the Tuxworth-Fullwood Museum. Each October, the Barkly Goldrush Campdraft Challenge allows locals and visitors to participate in camp draft events and experience bull and bronco riding, barrel racing, and a 'stockman's challenge'. The Overland Telegraph Line passed through Tennant Creek, and the Telegraph Station buildings from 1872 still stand today. Tourists can experience Aboriginal culture at the Nyinkka Nyunyu Art and Culture Centre or the Winanjjikari Music Centre. Nearby, the Kunjarra sacred site (The Pebbles) is a spectacular granite formation which tourists may visit. Tennant Creek also boasts natural sites like Tingkkarli/Lake Mary Ann at the Honeymoon Ranges, where visitors can enjoy nature and swim.[52]

Threeways Roadhouse

Situated to the north of Tennant Creek, Threeways Roadhouse is located close to the point where the Barkly Highway meets the Stuart Highway. The Barkly Highway connects the Stuart Highway with the eastern part of the Barkly Region, and the NT with Queensland. The Three Ways Roadhouse offers food, fuel, accommodation, and visitor information.

Newcastle Waters

Newcastle Waters is a tiny locality of just 64 people.[53] Located 28 km north of Elliott, it is easily accessible along the Stuart Highway. Newcastle Waters is about 700 km south of Darwin and 800 km north of Alice Springs, roughly an eight hour drive from either.

Newcastle Waters was originally a gathering place for drovers on their overland cattle drives. Its location is at the junction of three major stock routes, which led it to becoming an important spot for provisions and a place to rest. The township is largely empty today, but 1960s buildings remain and can be safely explored, such as the Jones's Store and Junction Hotel. The Drover's Memorial Park can also be visited.[54]

Elliott

Elliott is located roughly halfway between Darwin and Alice Springs along the Stuart Highway. Elliott can be reached from either Darwin or Alice Springs in about 7.5 hours by car. Elliott's population of 339 is 69% Aboriginal. Common languages spoken include Mudburra, Jingulu, and Wambaya. The top industries of employment are local government administration and primary education.[55]

Elliott was once a significant army staging camp during World War II. Before that, Elliott was part of Newcastle Waters Station. Now, Elliott is predominantly a service provider for surrounding pastoralists, and offers fuel, supplies, and accommodation in the form of caravan and camping sites.

Karlu Karlu/Devils Marbles Conservation Reserve

The Devils Marbles are a collection of boulders located 100 km south of Tennant Creek. They can be reached in about one hour by car from Tennant Creek, or four hours from Alice Springs. The Warmungu Aboriginal people believe the boulders are fossilised eggs of the Rainbow Serpent. Visitors can learn about the ancient Aboriginal mythology through a self-guided walking tour around the reserve. The boulders stand up to six metres high and have formed over millions of years. Visitors may camp at the reserve overnight.

Wycliffe Well

Wycliffe Well is located 130 km south of Tennant Creek and 375 km north of Alice Springs. It can be reached by car in 1.5 hours from Tennant Creek or 3.5 hours from Alice Springs. Wycliffe Well is most known as the UFO capital of Australia. The Wycliffe Well Holiday Park offers food, fuel, accommodation, and a place to share UFO stories.[56]

[51] Australian Bureau of Statistics, *2016 Census QuickStats: Tennant Creek*. https://quickstats.censusdata.abs.gov.au/census_services/getproduct/census/2016/quickstat/SSC70251, (accessed 27 February 2020).
[52] Tourism NT, *Tennant Creek: A stopover full of surprises*. https://northernterritory.com/tennant-creek-and-barkly-region/destinations/tennant-creek, (accessed 27 February 2020).
[53] Australian Bureau of Statistics, *2016 Census QuickStats: Newcastle Waters*. https://quickstats.censusdata.abs.gov.au/census_services/getproduct/census/2016/quickstat/SSC70205, (accessed 27 February 2020).
[54] Tourism NT, *Newcastle Waters Historic Township*. https://northernterritory.com/tennant-creek-and-barkly-region/see-and-do/newcastle-waters-historic-township. (accessed 27 February 2020).
[55] Australian Bureau of Statistics, *2016 Census QuickStats: Elliott (NT)*. https://quickstats.censusdata.abs.gov.au/census_services/getproduct/census/2016/quickstat/SSC70091, (accessed 27 February 2020).
[56] Tourism NT, *Wycliffe Well Holiday Park*. https://northernterritory.com/tennant-creek-and-barkly-region/accommodation/wycliffe-well-holiday-park, (accessed 27 February 2020).

Iytwelepenty/Davenport Ranges National Park

The Iytwelepenty/Davenport Ranges National Park is located 150 km south-east of Tennant Creek, and can only be reached by high-clearance 4WD. The Park spans across 1120 km² and offers a network of 4WD tracks that are considered some of the best in the Territory. One 17 km track, the Frew River loop, is considered a challenging track and allows visitors to access the Old Police Station Waterhole, which is the Park's best-known attraction and a popular swimming spot. Birdwatchers can enjoy the hundreds of waterbirds that flock to the park, and visitors can enjoy the wildlife such as the black-footed rock wallaby, emus, and the Australian bustard. Visitors may camp in one of the park's bush campsites at the Old Police Station Waterhole or Whistleduck Creek.[57]

Renner Springs

Renner Springs is located 160 km north of Tennant Creek, approximately eight hours from either Darwin or Alice Springs. The Renner Springs Desert Inn is a roadhouse which offers fuel, accommodation, food and basic groceries. Renner Springs offers bird watching, a lagoon and springs walk, and Lubra's Lookout, a small mountain located 5 km south of Renner Springs. Here, visitors may climb to the top and see 360 degree views of the surrounding area.[58]

Barkly Homestead

The Barkly Homestead is a remote roadhouse located at the intersection of the Barkly Highway and Tablelands Highway. The Homestead is the first stop along the road from Queensland, over 460 km from the nearest town. The Homestead offers accommodation, food, a bar, and fuel.[59]

Barrow Creek

Located 220 km south of Tennant Creek, Barrow Creek is home to one of three historical reserves in the Barkly Region. Built in 1871, the Barrow Creek Telegraph Station was one of the stations along the Overland Telegraph Line which connected Darwin and Port Augusta. The Barrow Creek Hotel offers fuel, accommodation and a bar.[60]

Wauchope

Wauchope is a tiny settlement on the Stuart Highway near the Devils Marbles. Location of the Devils Marbles Hotel, Wauchope offers accommodation, food, fuel, and a bar. Visitors are able to go bird watching, camping, swimming, and bush walking in the relaxing outback location.[61]

Warrabri/Ali Curung

Located 170 km south of Tennant Creek, Ali Curung is a small Aboriginal community of 494 people. Ali Curung is home to the Arlpwe Art and Culture Centre, an art gallery and cultural centre which promotes the artistic work of local artisans.[62]

Banka Banka Station

Located 100 km north of Tennant Creek, Banka Banka Station was the first operational cattle lease in the region and served as an army camp during WWII. Now, it offers camping, cultural immersion, rodeos, stockman demonstrations and walking trails.

Barkly Stock Route

The Barkly Stock Route is a rural road connecting the Stuart and Tablelands highways. It services some of the largest cattle stations in the country and was recently upgraded to protect against flood closures. The Barkly Stock Route provides 4WD opportunities for travellers who want to experience 'off the beaten track' and explore untouched parts of the Northern Territory.

Binns Track

Binns Track is an epic 4WD track that allows tourists to explore lesser-known areas of the NT that are full of colour, native wildlife and mighty rock formations. It stretches from the SA/NT border all the way up to Timber Creek, passing through much of the Barkly Region, including Iytwelepenty/Davenport Ranges National Park and Tennant Creek.

57 Tourism NT, *Davenport Ranges*. https://northernterritory.com/tennant-creek-and-barkly-region/destinations/iytwelepenty--davenport-ranges-national-park, (accessed 27 February 2020).
58 Renner Springs Desert Inn. https://rennerspringshotel.com.au/
59 Barkly Homestead. https://www.barklyhomestead.com.au/
60 Tourism NT, *Barrow Creek Hotel*. https://northernterritory.com/tennant-creek-and-barkly-region/see-and-do/barrow-creek-hotel

61 Devils Marbles Hotel. http://www.devilsmarbleshotel.com.au/outback-of-the-northern-territory
62 Tourism NT, *Arlpwe Art and Culture Centre*. https://northernterritory.com/tennant-creek-and-barkly-region/see-and-do/arlpwe-art-and-culture-centre
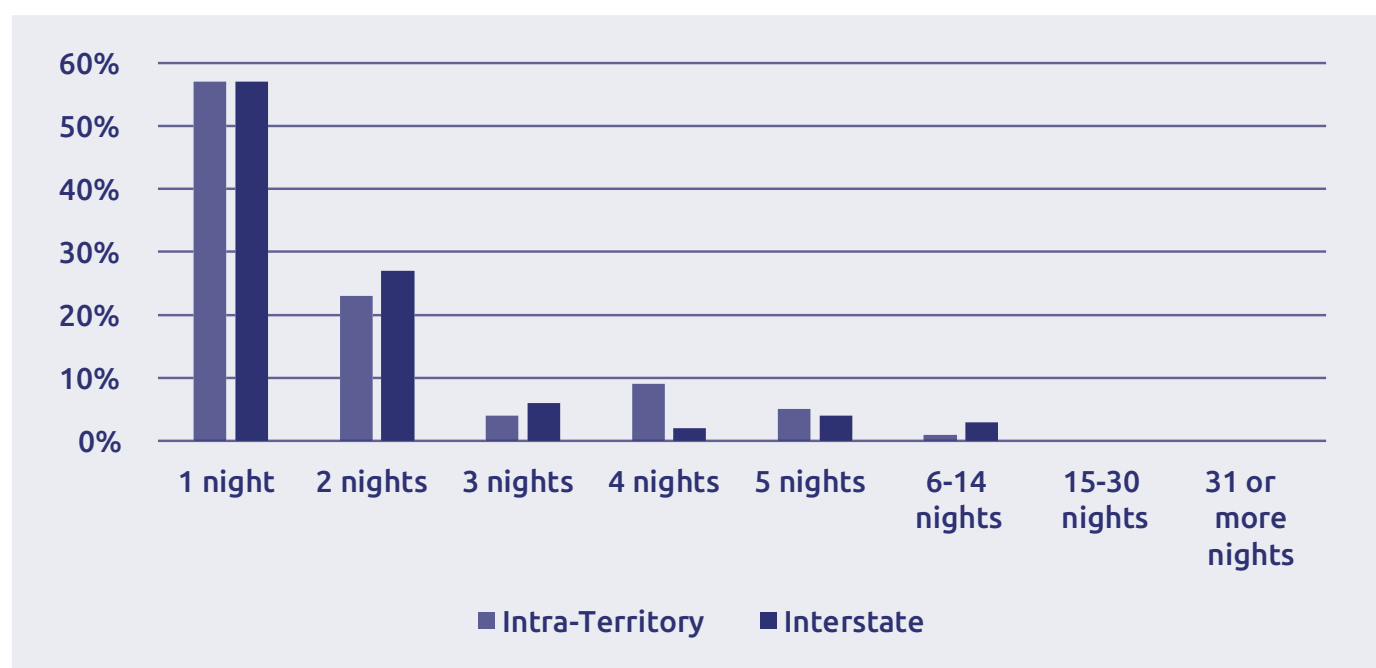
Appendix D - Barkly Region visitor market

The charts below summarise the Region's visitor market.

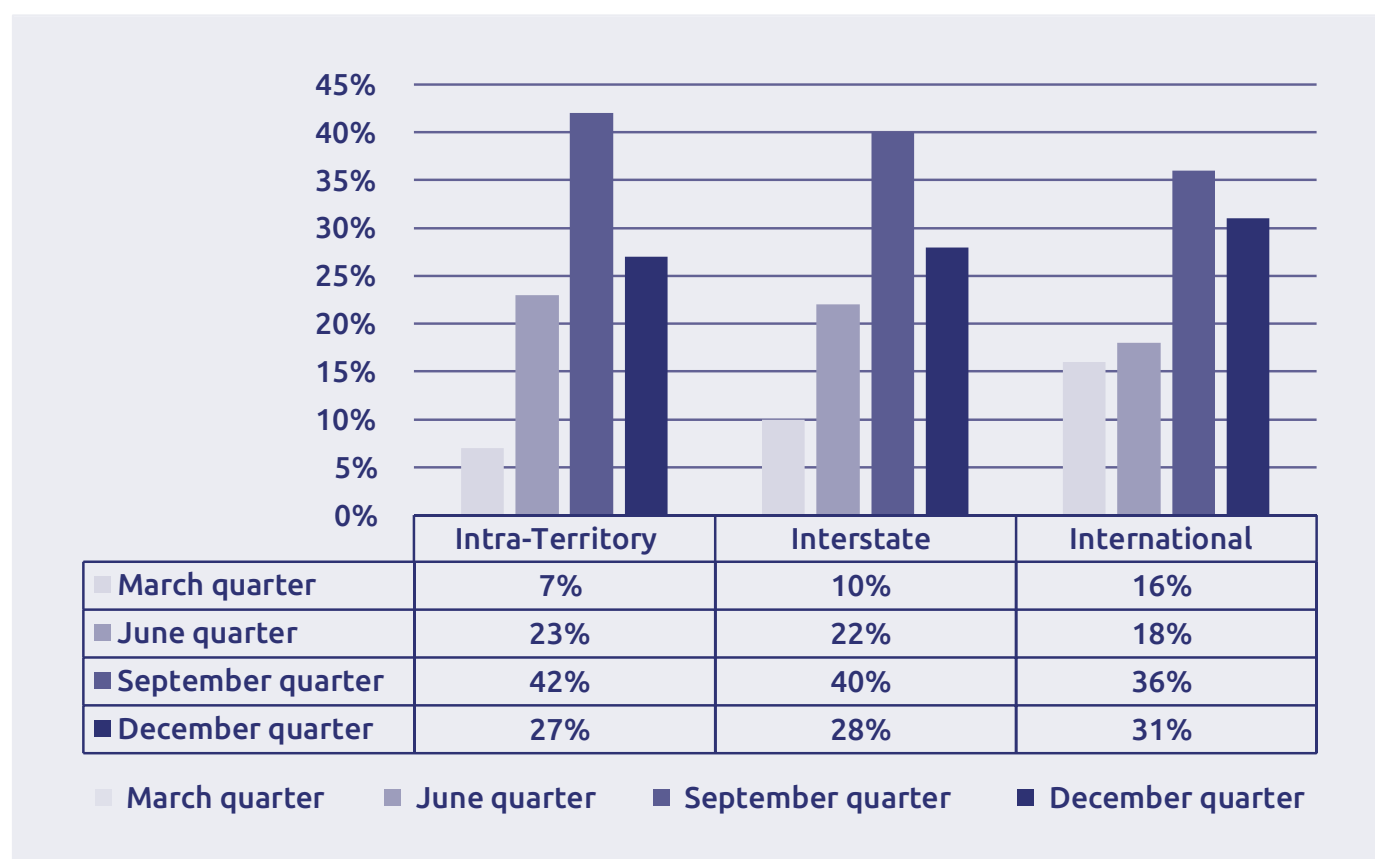**Figure 4** - Tourism consumption in Barkly Region, 2017/18 ($ million)
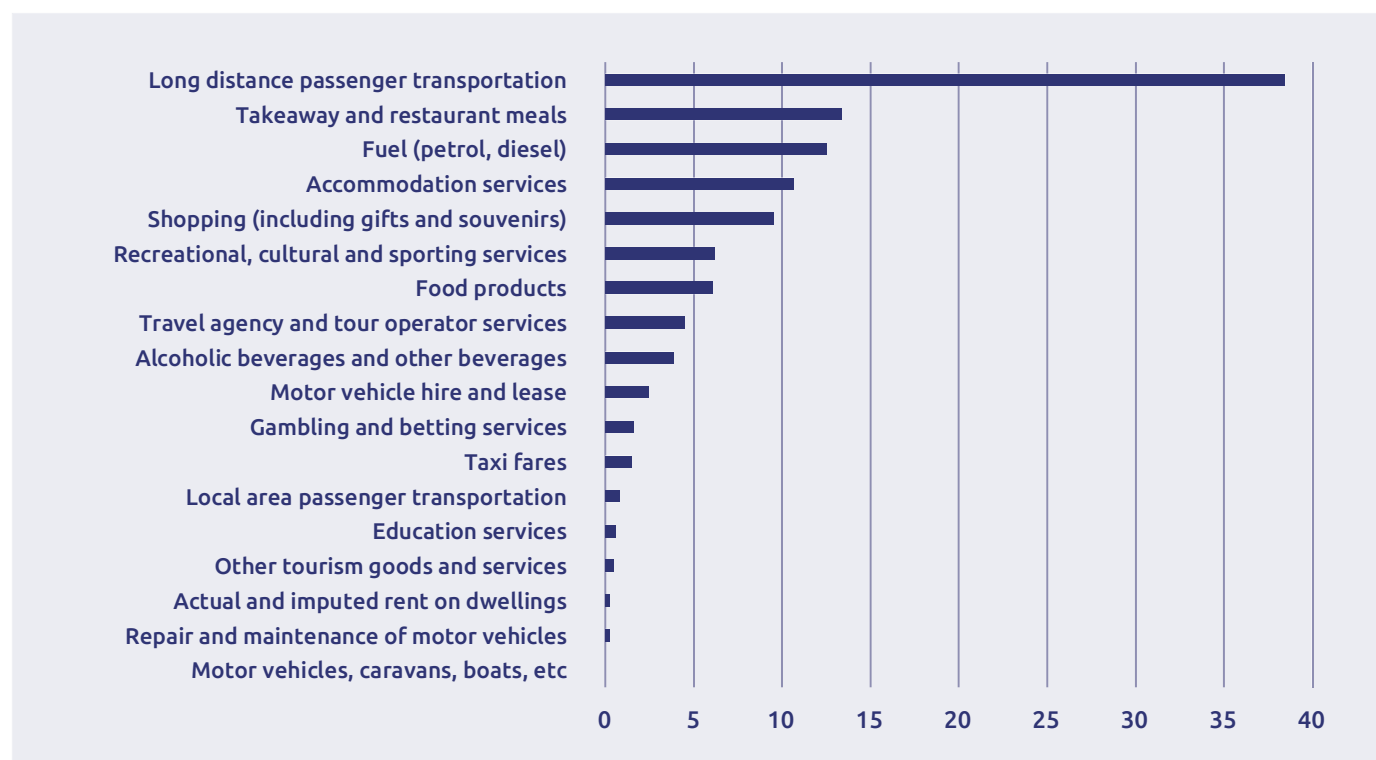
Source: Tourism Research Australia, *Regional Satellite Accounts: Barkly.*

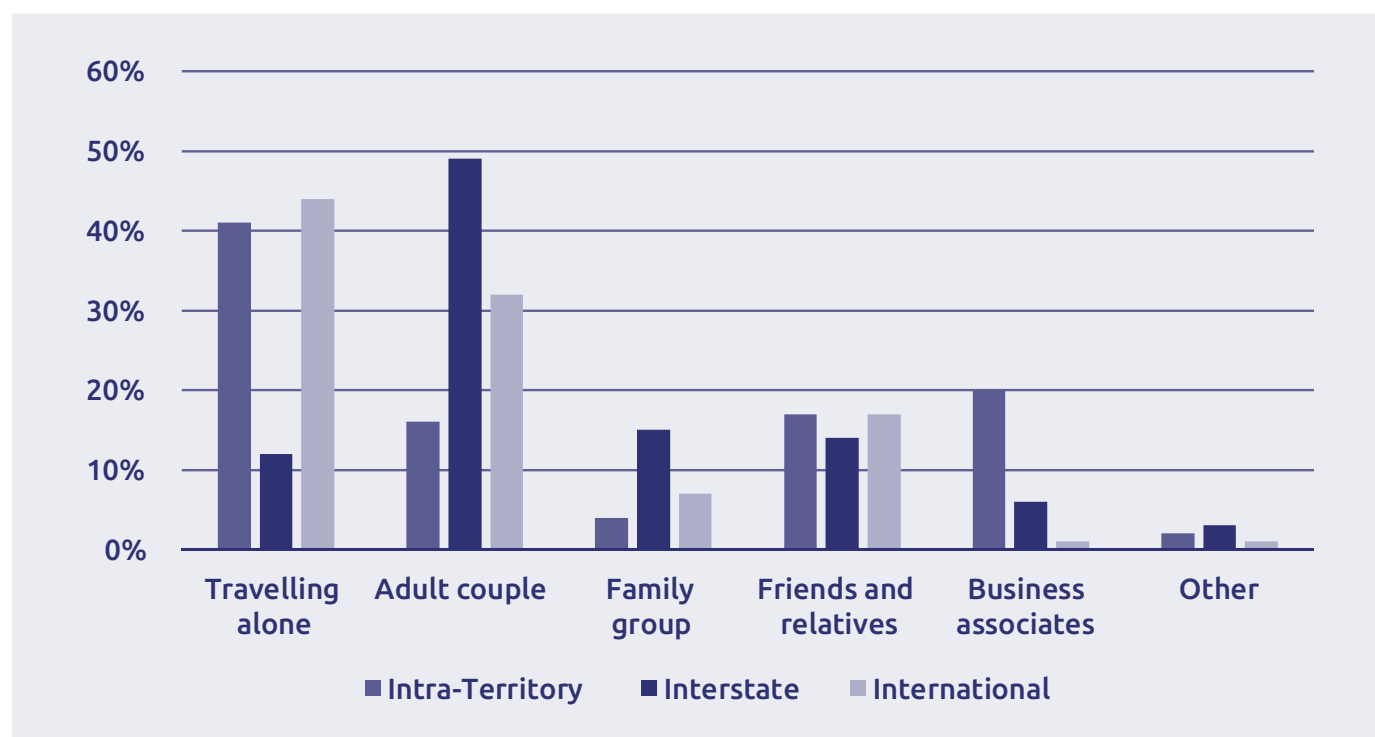**Figure 5** - Length of stay, domestic leisure drive market

Source: Tourism NT, *Regional Profile: Barkly Year Ending June 2016-June 2018.*

Figure 6 - Visitation by quarter, three year average YE June 2016-2018

	Intra-Territory	Interstate	International
March quarter	7%	10%	16%
June quarter	23%	22%	18%
September quarter	42%	40%	36%
December quarter	27%	28%	31%

March quarter   June quarter   September quarter   December quarter

Source: Tourism NT, *Regional Profile: Barkly Year Ending June 2016-June 2018.*

**Figure 7** - Visitation by travel party type, three year average YE June 2016-2018

Intra-Territory   Interstate   International

Source: Tourism NT, Regional Profile: *Barkly Year Ending June 2016-June 2018.*

Figure 8 - Visitation by age group, three year average YE June 2016-2018
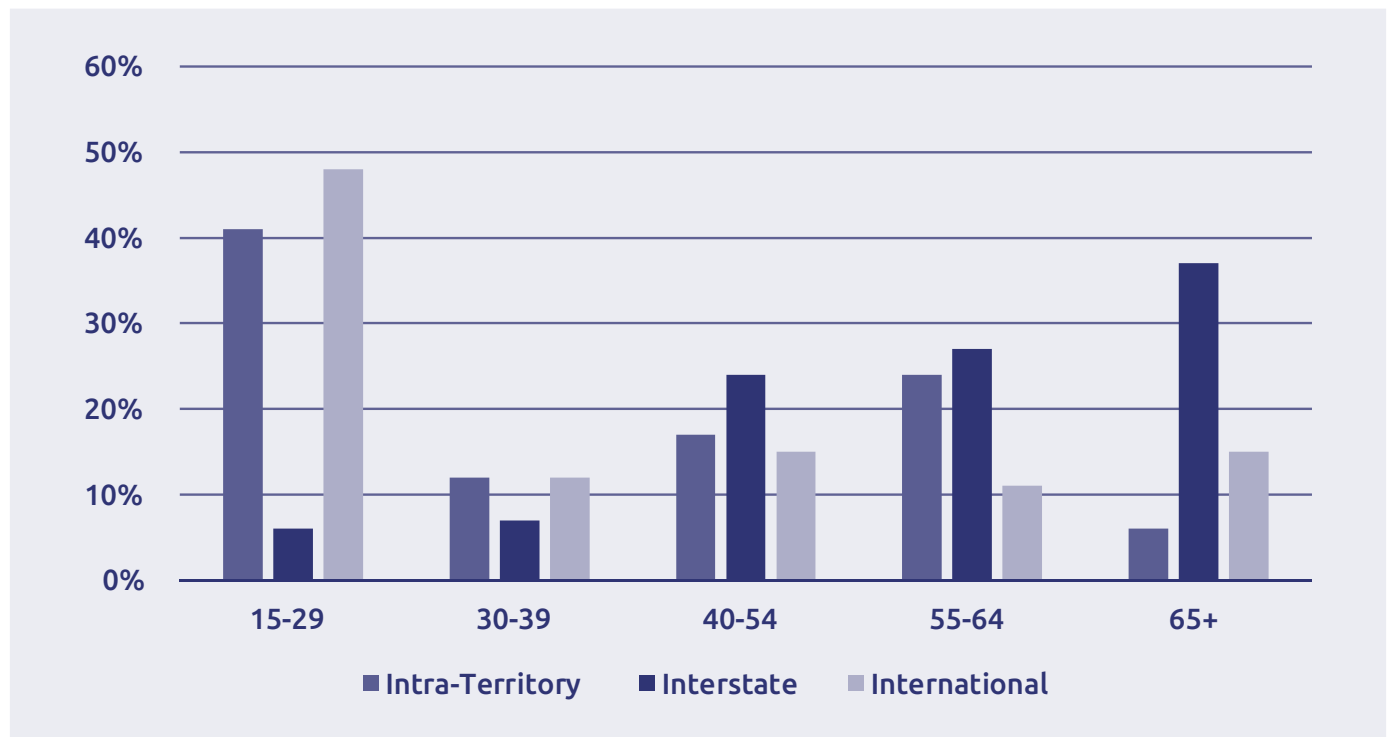
Source: Tourism NT, *Regional Profile: Barkly Year Ending June 2016-June 2018.*

Figure 9 - Visitation by accommodation type used
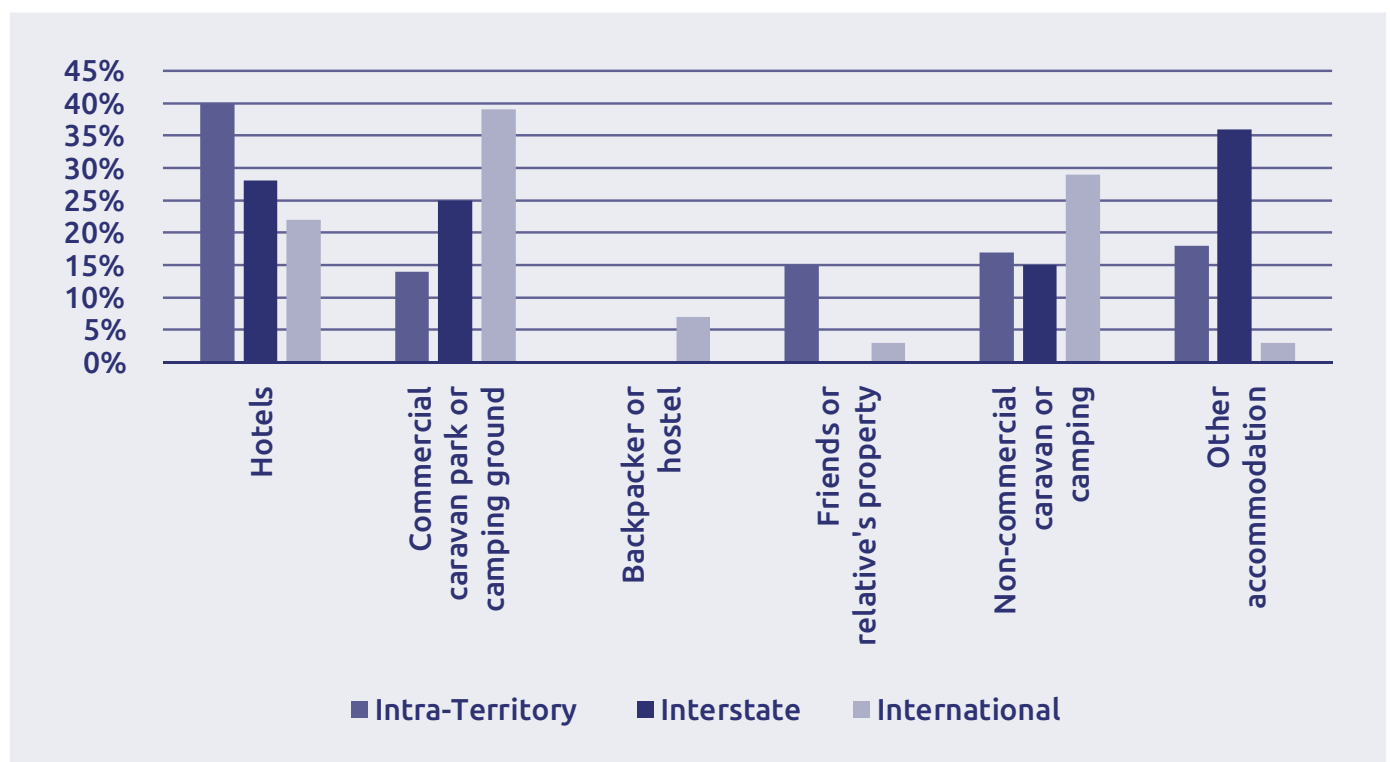
Source: Tourism NT, *Regional Profile: Barkly Year Ending June 2016-June 2018.*

Views from Bill Allen lookout - Tennant Creek

Appendix E - Tourism development planning in the Barkly Region

Destination management requires alignment and collaboration across the public, private and community sectors. It involves stakeholders from the tourism sector as well as stakeholders from all sectors contributing to the experience of a destination. The Destination Management Plan for the Barkly Region works to build on and harness the collective action of the Region to enhance tourism outcomes.

Tourism industry development

NT's Tourism Industry Strategy 2030

The *NT's Tourism Industry Strategy 2030* (the Strategy) was developed to guide tourism development across the Territory for the next ten years. The Strategy was co-developed with industry and government and includes six priority objectives:

1. Grow investment in the Northern Territory's remarkable assets, product and regions
2. Strengthen and showcase the Northern Territory's distinctive Aboriginal cultural tourism experiences
3. Through strategic marketing activities, grow the value of the holiday market in the Northern Territory
4. Leverage and build events to drive visitation
5. Develop ongoing access to and within the Northern Territory
6. Increase recognition of the value of tourism to the Northern Territory.

These objectives are underpinned by four pillars:

- Marketing
- Industry development
- Workforce development
- Collaboration across industry and government.

The Strategy provides a plan, with actions and outcomes associated with each priority objective. To ensure the Strategy remains relevant through to 2030, regular reporting and review exercises have been outlined including an annual report card, three-yearly reviews, and flexible target ranges. The Strategy's core objective is to achieve sustainable growth in tourism across the Territory, fostering inclusive growth throughout the industry, and across regions, sub-sectors and markets.

NT Aboriginal Tourism Strategy 2020 – 2030

Tourism NT with the NT Aboriginal Tourism Advisory Council have developed the *NT Aboriginal Tourism Strategy 2020 – 2030* to guide the development of Aboriginal tourism in the NT toward the vision for the NT to be the undeniable leader in the Aboriginal tourism sector.

The Strategy sets out an approach to development of the sector through a focus on building the five key pillars of:

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

An annual report and three yearly reviews will support the delivery of the *NT Aboriginal Tourism Strategy 2020-2030.*

Turbocharging Tourism initiative

IIn 2018 the NT Government committed $5.5 million towards the Turbocharging Tourism initiative to revitalise and improve the visitor experience at Battery Hill Mining Centre property and the Tennant Creek CBD.

The commitment is subject to a scoping study for the future of the entire Battery Hill Mining Centre site which currently has a number of visitor services, displays and artefacts including:

- the Barkly Region accredited Visitor Information Centre and retail centre including a small café and meeting room
- a minerals museum
- the Borella display which acknowledges the achievements of Albert Borella, a WWI Victoria Cross recipient who came from the local area
- a demonstration mining tunnel into which visitors can walk and obtain a tour guide led interpretive experience
- a gold ore battery
- a display of Barkly Region pioneering history and artefacts
- various mining relics situated throughout the site.

$1.5 million has also been allocated for the CBD street scape masterplan design and implementation.

Tourism Infrastructure

The Department of Infrastructure, Planning and Logistics (DIPL) plays a key role in tourism development as it brings together the key functions that drive land use, infrastructure and transport. In its 10 Year Infrastructure Plan 2019-2028, DIPL lists a number of projects that will benefit tourism throughout the Region:

- Barkly Region development, including new tourist attractions along the Stuart Highway
- Tennant Creek Art and Culture upgrades, connecting the Arts Trail
- New visitor experiences in Tennant Creek including gold rush and ore mining interpretive displays
- Tennant Creek parks and gardens – new caravan park and upgrade facilities
- Barkly Streetscape Project
- Lake Mary Ann upgrade
- Stuart Highway Tennant Creek tourism entry statements and improved drainage.

These projects are specifically for the benefit of tourism in the Region, with the aim of increasing tourism attractions on the Stuart Highway, increasing visitor numbers and length of stay, celebrating the Territory's history by establishing new interpretive displays, and creating a sense of place.

Park management plans

Parks form a significant component of the tourism experience in the Region. Various park management plans exist in the Region, identifying a variety of intents and priorities depending on the stakeholders involved in the plan. The plans highlight the delicate balance between the management of park and stakeholder values in conjunction with growing tourism in the Region. The development of joint management plans across the Region points to the important role traditional landowners have in the co-management of Parks.

Management plans have been considered for:

- Iytwelepenty/Davenport Ranges National Park
- Tennant Creek Telegraph Station Historical Reserve
- Devils Marbles Conservation Reserve.

Each of the plans list values for the parks, which typically include a combination of cultural, natural, recreational/ touristic and historic values.

The Iytwelepenty/Davenport Ranges National Park Joint Management Plan focuses on natural, cultural and recreational values. Its vision is for the Traditional Owners and NTG to increasingly work together to manage the Park, respecting and acknowledging each other's skills and knowledge, and communicating clearly. The purpose of the Plan is to ensure that the Park will be managed to:

- Enable visitors to enjoy a remote part of the NT and appreciate its cultural significance
- Maintain the significant biodiversity values, especially the Park's threatened species and wetland values
- Maintain an equitable and effective partnership with Traditional Owners
- Meet the needs of Traditional Owners to maintain their connection to country, protect and manage their sacred sites and to create employment opportunities in the Park.

The Devil's Marbles Conservation Reserve Joint Management Plan shares a vision that the Traditional Owners and Parks and Wildlife NT will work together and take pride in the country, culture and partnership. Focusing on cultural, scenic/ tourism, natural and historic and education values, the plan's priorities are to:

- Meet the needs of Traditional Owners to maintain connection to their country and to gain meaningful economic benefit from the area
- Provide visitors with a memorable experience based on the reserve's iconic outback scenery and its lasting connection to powerful cultural traditions
- Preserve the area's outstanding scenic qualities
- Encourage community and visitors' understanding and appreciation of the reserve's cultural values.

The Tennant Creek Telegraph Station Historic Reserve's Plan of Management focuses on the historic and recreation/ tourism values. The Plan's primary objectives are:

- To manage and conserve the fabric of the Telegraph Station buildings and surrounding historic sites in accordance with the Conservation Plan update
- To present the Telegraph Station buildings and their environs in an appropriate manner
- To protect and manage sites and resources of historical significance found in the Reserve
- To preserve and, where appropriate, display historic artefacts associated with the Reserve
- To enable visitors to appreciate and understand the significance of the cultural resources of the Reserve through interpretive material and programs
- To promote and encourage further research into the history of the Reserve.

Visitor experience plans

The Barkly Regional Visitor Experience Master Plan was developed by the Barkly Regional Council and Tourism NT in late 2018 to identify opportunities for improving the visitor experience across the Region.

The plan aims to:

- Extend visitor length of stay in the Region through consumer focus, attractive and safe experiences, and more effective promotion
- Strengthen relationships with neighbouring regions and states to enhance the existing road journeys
- Encourage visitors to leave the highway and travel through some of the more remote and natural areas of the region
- Ensure a coordinated approach to tourism between business, government, the tourism industry and communities.

The featured priorities in the plan are:

- Develop Tennant Creek as a vibrant tourism hub
- Improve the visitor journey along the Stuart Highway
- Develop an exceptional Aboriginal cultural scene that is sustainable and culturally appropriate
- Enhance existing and create new bespoke events that celebrate the true characteristics of the Barkly Region
- Conduct a review of accommodation options for travellers with the aim of diversifying offerings
- Establish Tennant Creek as a training and development hub servicing regional businesses, organisations, communities and government agencies
- Explore new visitor experiences such as private touring opportunities at sites including Helen Springs petroglyphs, Eldorado fossicking and mine site, and extending Binns Track as an epic 4WD journey.

Regional council plans

The Barkly Regional Council plays an important role in providing services and supporting the economic and social development of the Region. The Council has a vision for the development of the Region that can be leveraged in tourism planning.

The *Barkly Regional Council Plan 2019-2020* aims to develop the Region, and identifies a number of actions which directly impact tourism, including:

- Promote Barkly as a destination through Council's social media sites
- Support and promote community events
- Provide an annual budget to support community events
- Assist NTG to implement the Barkly Region Visitor Experience Master Plan
- Support NTG Turbocharging Tourism initiatives to ensure the best use of government funds
- Upgrade Purkiss Reserve.

Barkly Regional Deal

The *Barkly Regional Deal* is a 10-year, $78.4 million commitment between the Australian Government, Northern Territory Government, and Barkly Regional Council. Launched in April 2019, the *Barkly Regional Deal* provides $78.4 million in three priority areas:

- Economic development
- Social development
- Culture and place-making.

The economic development initiatives aim to create local jobs and maximise untapped opportunities in the resources, agriculture, and tourism sectors. Tourism is viewed as a high economic potential sector for the Region. Initiatives in the plan supporting the growth of the tourism industry in the Region include:

- Providing training and development opportunities in areas of high economic potential, which include mining, construction, essential services, tourism, roadbuilding and health services
- A feasibility study to assess the commercial viability of establishing an Arts Centre to attract visitors and develop economic opportunities in Elliott
- Marketing and promotion by Barkly Regional Council to attract business growth and tourism
- The Roads of Strategic Importance initiative by the Australian Government to connect regional and Aboriginal communities and facilitate tourism opportunities.

Key findings

Exploration of the tourism and destination development plans impacting the Region highlight a number of opportunities that could be leveraged to develop the Region's tourism industry, notably the $78.4 million Barkly Regional Deal.

Tourism development activities are supported by the overarching tourism industry strategy identifying priorities for the industry to 2030. Another significant strategy assisting industry development efforts in the Region is the DIPL infrastructure plan. Complementing these high-level plans are operational plans for the management of Parks, community level plans developed by Regional Councils, and the Barkly Visitor Experience Master Plan. These plans all support local infrastructure development, resource allocation and coordination of collective action focused on growing regional and tourism outcomes. All of the plans highlight the significant opportunity that exists through coordinated planning and investment in the Region.

Appendix F - Accessible Tourism

Accessible tourism focuses on ensuring tourism destinations, products and services are accessible to all people, regardless of their physical limitations, disabilities or age.[63]

Tourism infrastructure that is accessible is also beneficial 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 populations 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 five people have a disability, representing 4.3 million people, or roughly 18% of the population.[64] These figures are compounded by an increasing prevalence of persons with a disability, as the population ages and chronic diseases spread.[65] 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.[66] Of these, 85 million are in China[76] and 7.5 million are in Japan.[68] With Asian countries accounting for just under half of international visitors to Australia,[69] and Japan and China being the fourth and fifth biggest source markets in the NT respectively,[70] this is a notable population cohort.

The size and growth trends of the population requiring greater accessibility 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
- Accessible Beaches review
- 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. It contains 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
- Provide a report outlining findings and general recommendations.

Each report provided a list of recommendations for improvements to make the locations more accessible for everyone.

Additionally, 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 (DIPL) 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.

[63] Tourism Australia, Accessible tourism, https://www.tourism.australia.com/en/events-and-tools/industry-resources/building-your-tourism-business/accessible-tourism.html
[64] Australian Institute of Health and Welfare, *People with Disability in Australia*.
[65] World Health Organisation, *World Report on Disability*.
[66] United Nations, *Disability in Asia and the Pacific: The Facts*.
[67] Sixth Tone, Invisible Millions: *China's Unnoticed Disabled People*.
[68] Disabled World, *Disability in Japan: Overview and Statistics*.
[69] Tourism Research Australia, *International Visitor Survey YE September 2019*.
[70] Northern Territory Department of Treasury and Finance, Northern Territory Economy: *Tourism*.

Potential scope of the accessibility market

The potential scope of the accessibility market presents both 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.[71]

In addition to the significant size of the accessible tourism market, Tourism Research Australia estimates that domestic tourists with a disability spend $3.2 billion annually.[72]

Accessible tourism product needs

Current statistics indicate that people with disabilities travelled almost as frequently as people without disabilities.[73] 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 a person 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 the activities that travellers without a disability participate in. Table demonstrates the similarity between cohorts with and without a disability, showing that the demand for products is very similar. This indicates the need for tourism operators to attract the accessible tourism market by addressing accessibility requirements in many of the Region's existing tourism offerings.

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 /cafe	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 day trip 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 (2016 onwards)	3%	2%	2%
Attend movies /cinema	3%	3%	3%

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

[71] Travability, *Understanding the Opportunity for Australia in Accessible Tourism.*
[72] Tourism Research Australia, *2018, Accessible Tourism in Victoria and Queensland.*
[73] Travability, *Understanding the Opportunity for Australia in Accessible Tourism.*

Accessible tourism product needs

A Tourism Research Australia study of accessible tourism in 2017[74] identified the specific needs of the accessible tourism market focused heavily on information and support services, including:

- Information
- Planning
- Service
- 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 relatable.

Despite this being a priority, currently no central service is available to tourists seeking advice on accessible tourism options in the NT or the Region. As a result, prospective visitors with accessibility needs are required to enquire directly with providers. Presenting a significant barrier to attracting travellers with a disability to the Region, with the study finding that "if this 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."[75]

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 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 actually know what is possible.[76]

In addition to the availability of relevant information, 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 among 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 travelling with a carer could assist in removing these barriers.[77]

Facilities and transport are additional barriers to travellers with a disability. Improvements in practical information such as location of toilets, lifts, accessible toilets, 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.[78]

For the Barkly 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 a 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 further 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. This indicates the ability to meet the needs of this market, through making existing experiences and facilities in the Region accessible.

The high proportion of drive visitation to the Region, and the prioritisation of information about accessibility offerings by the accessible traveller, indicates that the focus of efforts to build accessible tourism in the Region should include: enhancing the scale of accessibility offerings in the Region; collation and communication of accessibility offerings in the Region with the market; and accessible amenities for the drive market. Further to localised action, an opportunity exists for accessible tourism efforts to be scaled across the NT.

[75] Tourism Research Australia, *State of the Industry 2018-19.*
[76] Travability, *Understanding the Opportunity for Australia in Accessible Tourism.*
[77] Ibid.
[78] Ibid.

Four-wheel driving the Red Centre – Barkly Region