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Destination Management Plan Big Rivers Region 2020



Key Partners



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Front Cover:
Nitmiluk Gorge – Nitmiluk National Park

Back Cover:
Katherine Hot Springs – Katherine

This Page:
Nitmiluk Gorge – Nitmiluk National Park



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The Lost City – Limmen National Park

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The Big Rivers Region Destination Management Plan

The Big Rivers Region (the Region) begins south of Kakadu National Park encompassing Pine Creek, then extends over 500km south to Kalkaringi and stretches across the width of the Territory between the Western Australia and Queensland borders.

The Big Rivers 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.

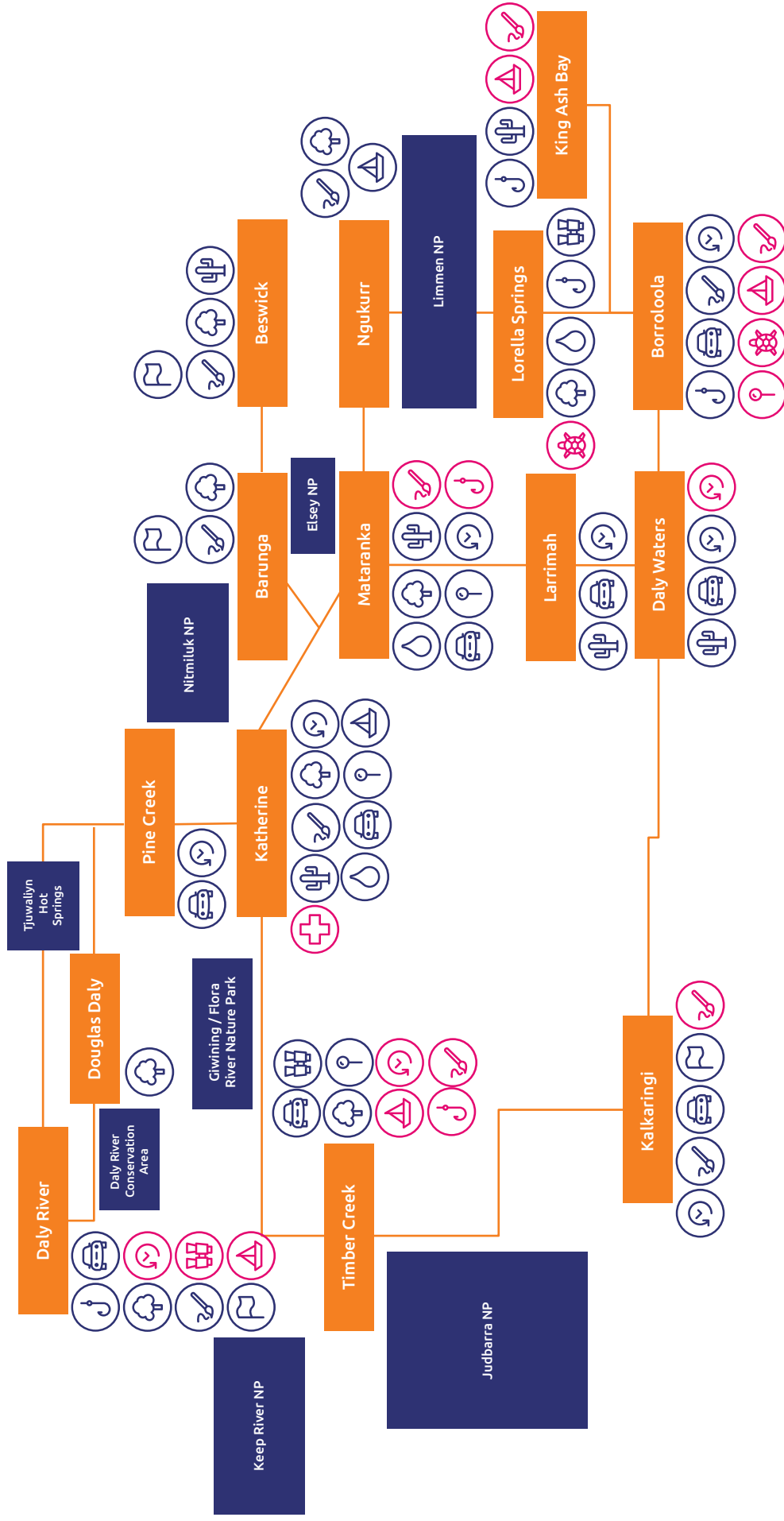
The Department of Industry, Tourism and Trade has invested in destination management planning as part of a suite of actions following the development and release of the *NT's Tourism Industry Strategy 2030*. Over 100 stakeholders' contributions through direct engagement or survey response were collected 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 Big Rivers Region

The Big Rivers Region is significant in scale, covering over 360,000km² and accounting for an area greater than that covered by Germany. The Big Rivers Region consists of a number of varied natural environments including vast rivers, tropical forests, rocky escarpments and savannah plains.

The Region offers attractive tourism opportunities, including experiences available through the notable Nitmiluk (Katherine Gorge) National Park (Nitmiluk National Park), as well as many other experiences built around unique natural environments, sporting and recreational activities, Aboriginal culture and pioneering history.

A snapshot of the key tourism destinations and experiences 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.



- | | | | |
|--|--|--|----------------------------|
| | Fishing | | Arts and culture |
| | Natural attractions | | Wellness |
| | History and heritage | | Swimming and hot-springs |
| | Services (fuel, accommodation, food, etc.) | | Boat/river cruise |
| | Bird watching | | Wildlife |
| | National Park | | Existing product |
| | Outback experience | | Proposed/potential product |
| | Festival | | |

Figure 1 - Big Rivers Region tourism experiences

Tourism is an important industry for the Big Rivers Region, contributing

\$155.8 million

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

10%
of the working population¹

Across 2016-2018, the Big Rivers Region received an average of

353,000
visitors per year,

the vast majority of which

(90%)
were Australian domestic travellers

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

78% of all visitors to the Region,²

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

Tourism in the neighbouring NT regions

Table 1 below shows the high proportion of travellers moving between NT tourism regions and the Big River Region, indicating it is a critical destination to the tourism industry. Table 1 reveals that the Big Rivers Region is an important contributor to the Darwin region with the majority of visitors to the Region travelling north. In particular, Kakadu and Barkly are important regions with high numbers of travellers continuing from these destinations into the Big Rivers Region. The analysis further suggests there is an opportunity to entice more visitors from other regions, particularly the Greater Darwin region.

Table 1 - Travel occurring between the Big Rivers Region and other regions of the NT, % of visitors

Region	Visitor	To Big Rivers	From Big Rivers
Greater Darwin	International	24	89
	Domestic	20	69
Kakadu and Arnhem Land	International	52	46
	Domestic	44	32
Barkly	International	69	30
	Domestic	84	37
Alice Springs and MacDonnell Ranges	International	12	43
	Domestic	15	31
Lasseter	International	9	40
	Domestic	14	21

Source - Tourism NT, Regional Profiles

¹ Tourism Research Australia, *Regional Tourism Satellite Account 2017-18: Katherine Daly*.

² Tourism Research Australia, *Regional Tourism Satellite Account 2017-18: Katherine Daly*.

Table 2 shows data from Tourism Research Australia on movements (number of trips) between tourism regions in Australia for 2018-19. This data highlights the importance of the Big Rivers Region to the neighbouring states of Western Australia and Queensland, facilitated through major drive routes of Northern Australia. The key road connections are discussed in Table 3; a small amount of air travel also enables access to the Region.

Table 2 - Trips between Big Rivers Region, WA and QLD, 2018/19

State	Region	To Big Rivers	From Big Rivers
Western Australia	North West	151	271
	Coral Coast	4,897	33
	Perth	587	7,799
	Total	5,635	8103
Queensland	Tropical North	9,438	9,332
	South	2,354	2,537
	Brisbane	3,257	3,445
	Outback	n/a	133
	Gold Coast	2,720	n/a
	Total	17,769	15,447

Table 3 - Road access and connections in the Big Rivers Region

Route	Contributes to tourism in the Big Rivers Region, as:	Key destinations of the Big Rivers Region on the route
Stuart Highway	The primary connection of northern and central NT and SA	Pine Creek, Katherine, Mataranka, Larrimah and Daly Waters
Victoria Highway	The primary connection to Northern WA - a neighbouring region	Timber Creek, Katherine, Judbarra/Gregory National Park
Carpentaria Highway	The primary connection to Northern QLD - a neighbouring region	Borroloola, Daly Waters, Limmen National Park
Central Arnhem Road	The primary vehicle entry and/or exit point to East Arnhem Land	Barunga, Beswick
Kakadu Highway	The southern entry and/or exit point to Kakadu	Pine Creek
Roper Highway	The primary entry and/or exit point to Ngukurr, Numbulwar and Limmen National Park	Ngukurr, Limmen National Park, Numbulwar
Buchanan Highway	An alternative unsealed connection to the Stuart Highway, between the south of the Region to the West via Birdum to the Victoria Highway near Timber Creek	Yarralin, Judbarra/Gregory National Park
Buntine Highway	An 'off the beaten track' connection from Victoria Highway to Halls Creek in WA	Kalkaringi, Judbarra/Gregory National Park
Tableland Highway	An 'off the beaten track' connection from Barkly Homestead to Cape Crawford near Borroloola	Cape Crawford
Savannah Way	A unique drive journey connecting the north of WA, NT and QLD	Katherine, Borroloola, Mataranka, Timber Creek, Judbarra/Gregory National Park, Limmen National Park, Ngukurr
Explorers Way	A unique drive journey connecting Adelaide and Darwin	Pine Creek, Katherine, Mataranka, Larrimah and Daly Waters

In addition to road access, several common experiences and attractions support linkages across the Big Rivers Region and other regions in the NT, as shown in Table 4. These connections act both as unique attractions for the Region, as well as attractions that support visitation across the regions.

Table 4 - 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



Helicopter Ride – Nitmiluk National Park

Destination management planning for the Big Rivers Region

A comprehensive study of the current and potential state of the tourism industry for the Big Rivers 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 stakeholders priorities.

This analysis has highlighted the potential to leverage the Region's unique attractions, which are well aligned to the drivers of visitation in both the domestic and international market, as well as the opportunity to develop industry capability to support sustained advancement into the future. In addition, targeted efforts are required to address the barriers to visitation, including limited destination awareness and a highly competitive national and international travel market. The analysis also identified success and opportunities to be leveraged, including the strength of hospitality and awareness of opportunities for adventure focused experiences in the NT.

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:

- Delivering positive experiences
- Sharing and caring for visitors
- Telling and sharing the stories of the Region
- Visitors feeling welcome and safe
- Delivering authentic experiences
- Tailoring experiences to visitor needs.

Comparative advantages

The Big Rivers Region has several 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;

Katherine and the Big Rivers Region are at the centre of the road connections to WA, QLD, Darwin and Alice Springs, making it a vital intersection for drive tourism.

The quality, quantity and diversity of natural attractions of the Region;

eight national parks and reserves and five major river systems. It is known for its diversity in the landscapes, the outback swimming options and the abundance of wildlife.

Authentic Aboriginal cultural attractions and experiences;

the Barunga Festival attracts over 4,000 people per year, the culturally significant Kalkaringi Freedom Day Festival, Aboriginal community experiences, the NT Arts Trail, and Aboriginal cultural tours attract a significant proportion of visitors to the Region.

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

visitation and industry stakeholders feedback highlights that the range of unique community events in the Region are a key attraction for visitors and residents alike.

The hospitality, sense of adventure and the uniqueness of the Region;

visitors and industry stakeholders highlight the warmth and hospitality of the people they met on their journey as the best part of the visitor experience, and visitors associate the Region with a unique and adventurous experience.

Destination awareness

Despite the presence of high-quality tourism experiences such as Nitmiluk (Katherine) Gorge (Nitmiluk Gorge) and unique tourism offerings across the Region, several indications suggest limited awareness of the destination. Major trade partners in international source markets indicated a need for enhanced destination awareness broadly across the Region, as well as at individual sites such as the Katherine Hot Springs, recognising the limited capacity of local tourism operators to invest in the required marketing activities. National operators feedback, whilst focused on improving access and strengthening product offerings, also recommended further investment in destination marketing. Engagement with stakeholders revealed an ambition to establish and market a unique identity for the Region.

Feedback from stakeholders in the Region regarding visitor attractions and their satisfaction with experiences focused on:

- Driving and touring experiences
- Nature based experiences (Parks, rivers, fishing, hot springs)
- Cultural experiences (Aboriginal culture, arts, outback/farming culture, history and heritage).

Stakeholders also described the intangible attractions of the Region using language like: *Adventures; sense of the unknown; unique; roughness; remoteness; diverse; unpredictable; personal connections; and storytelling.*

The feedback from stakeholders aligns closely with Tourism NT's recently revised brand for the NT promoting a narrative focused on uniqueness; multi-sensory experience; freedom and possibility; and cultural and personal connections. This alignment presents an opportunity to leverage the refreshed NT tourism brand to establish a distinct articulation for the Region, to further emphasise its unique comparative advantages, key experiences and intangible attractions.

Approach to developing visitor experiences in the Region

Several opportunities exist to develop the tourism industry in the Big Rivers Region, through a focus on product development, destination development and capacity building over the next ten years. To support a strengths-based approach to development, the DMP works to leverage the Region's unique comparative advantages and strengths in the visitor market, while concurrently developing systems and investing in 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 utilise multiple tools to meet market needs.

To meet the needs of the Region, this report 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.

Industry gaps and opportunities

While the Region is highly valued for its natural, cultural, and history and heritage attractions, there are opportunities to strengthen the tourism industry, and further develop the quantity and quality of tourism products. An analysis of the opportunities and gaps identified in the Region's tourism industry, and approaches to maximising these opportunities or minimising gaps is summarised in Table 5.

Table 5 - Current opportunities and gaps in the Big Rivers Region tourism industry

		Approach to addressing opportunities and gaps
Opportunities to progress	Build on the Tourism NT brand and leverage market opportunities to develop and promote a clear regional identity	Strategic product packaging and marketing
	Build on visitor demand and satisfaction with the services of Parks and Wildlife NT in the Region	Facilitate collaborative action
	High demand for Aboriginal and nature-based tourism amongst Australian and international visitors	Capacity building activities
	Leverage attractiveness and brand awareness of Nitmiluk Gorge	Strategic product packaging and marketing
	Capacity for product development leveraging the natural, cultural and historical assets of the Region	Investment attraction initiatives & capacity building activities
	Maximising strategic planning, investment in tourism and infrastructure, government services, and stakeholder capacity in the Region	Facilitate collaborative action
	Establish quality offerings from fresh food to unique culinary experiences focused on provenance	Investment attraction initiatives & capacity building activities
	Build visitor numbers during the shoulder season to expand visitation across the year	Strategic product packaging and marketing & capacity building activities
	Promote the Region in conjunction with other States including the Savannah Way and The Ghan	Strategic product packaging and marketing
	Engagement with new or underdeveloped markets (Defence and Agriculture)	Capacity building activities & facilitate collaborative action
Gaps to address	Perception of visitor experiences in the Region representing poor value for money	Investment attraction initiatives & capacity building activities
	Coordinated land access for prospective investors and developers on Aboriginal and pastoral land	Investment attraction initiatives
	Mechanisms for engagement and collaboration between government, Land Councils, industry and prospective investors	Facilitate collaborative action
	Limited connectivity and coordination between industry operators across the Region	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 stops, waste services, river access points, internet and communications)	Facilitate collaborative action
	Poor satisfaction ratings and perceptions of the accommodation standard in Katherine	Investment attraction initiatives & capacity building activities
	Limited existing capacity and the lack of planning and strategic consideration for supporting accessible tourism in the Region	Capacity building activities
	Quality and quantity of visitor amenities that meet the needs of the current market demand	Investment attraction initiatives & 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 of the tourism industry to deliver quality tourism experiences and support the sustainable growth of the industry in the Big Rivers Region is a key element of development of the Region as a tourism destination. Current capability of operators is varied across the Region, and as industry operators are predominantly small and medium sized enterprises, they are susceptible to common challenges of small business, including limited resources and capability to deliver the broad range of activities that support industry development outcomes.

Why is this a priority?

- 65% of the Big Rivers Region's tourism businesses only consist of their owners or employed four or fewer employees³
- ReviewPro positivity ratings for value in the Region are ranked at a moderate value of 72%
- NT destination satisfaction survey data identified feedback that opportunities exist to improve accommodation, destination awareness, value for money and food options.

Leads:	Partners:	Actions:	Outcomes:
DITT	TTE, Hospitality NT, ISACNT	1. Department of Industry, Tourism and Trade (DITT) in collaboration with Tourism Top End (TTE), Industry Skills Advisory Council NT (ISACNT) and Hospitality NT to complete an assessment and deliver a suite of targeted skills development, capacity building training services to tourism operators in the Region (including Regional and Town Councils).	<ul style="list-style-type: none"> • Enhanced skill and capacity of tourism operators to meet current industry standards.
TNT	TTE, Hospitality NT	2. Tourism NT to continue to invest in ReviewPro or similar data collection tools and work collaboratively with TTE and Hospitality NT to support the development of industry standards using data insights.	<ul style="list-style-type: none"> • Enhanced awareness of tourism operators of visitor experiences and satisfaction • Improved satisfaction of visitors to the Region • Annual visitor satisfaction score card.
TNT	ATC	3. Tourism NT in partnership with the NT Aboriginal Tourism Committee (ATC) and industry to continue to implement the <i>Aboriginal Tourism Strategy</i> to build capacity across the Aboriginal tourism sector.	<ul style="list-style-type: none"> • Increased quantity and improved quality of Aboriginal tourism products.
Arts NT	ATC, Art Centres, TNT	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.	<ul style="list-style-type: none"> • Action plan to maximise the outcomes from the NT Arts Trail.
TNT	TTE, Hospitality NT	5. Tourism NT to work with industry to implement self-assessment and rectify accessibility barriers in their operations.	<ul style="list-style-type: none"> • Enhanced accessibility of tourism experiences in the Region • Increase visitation, consumption and experiences in the Region.
TTE		6. TTE to provide face to face support to areas outside of regional centres to expand membership base and business support.	<ul style="list-style-type: none"> • Enhanced skill and capacity of tourism operators to build the Region's tourism industry.

³ Tourism Research Australia, 2019, *Tourism Businesses in Australia*.

Facilitation of collaborative action

A wide range of stakeholders are contributing to the outcomes of the tourism industry in the Big Rivers 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 a 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 decisions 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 a wide range of stakeholders involved in 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.	<ul style="list-style-type: none"> • Coordinated implementation of the DMP.
TNT	PIT	2. Tourism NT in partnership with the PIT to prioritise communications infrastructure to address 'black-spots' in the Region.	<ul style="list-style-type: none"> • Increased investment in communications infrastructure across the NT • Improved visitor safety and ability to share and promote the Region via social media.
DCM&C	TNT ATC, NLC	3. Department of the Chief Minister & Cabinet (DCM&C), Tourism NT, ATC and the Northern Land Council (NLC) to work collaboratively to review and address barriers to the coordination of Aboriginal land access in the Region.	<ul style="list-style-type: none"> • 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.	<ul style="list-style-type: none"> • Reduced confusion within industry on the multiple grant programs • Enhanced outcomes for the funding available.
Regional and Town Councils	TNT, DIPL, DCM&C, DTFHC	5. Regional Councils 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), DCM&C and Department of Territory Families, Housing and Communities (DTFHC) to provide support to funding applications that will increase community safety, pride and a welcoming feel.	<ul style="list-style-type: none"> • Enhance visitor perceptions of safety and security • Enhance visitor experience.

Strategic product packaging and marketing

The comparative advantages of the Region align closely to the top reasons for visitation to both Australia and regional destinations in Australia, particularly nature based, cultural and unique tourism opportunities. There are several barriers limiting the dispersal of domestic and international visitors to regional destinations in Australia, some of which may be alleviated through targeted marketing activities and campaigns building the value of tourism offerings in the Region.

Why is this a priority?

- In 2017/18 only 10% (35,000) of visitors to the Region were international, resulting in a high reliance on the domestic tourism market
- Issues of value for money have been identified in the NT destination satisfaction survey and ReviewPro data
- National operators and trade partners have suggested greater investment in destination marketing to increase awareness of the Region in a competitive national and global market.

Leads:	Partners:	Actions:	Outcomes:
TTE	TNT	1. TTE to facilitate packaging of tourism experiences in the Region with Territory and interstate products.	<ul style="list-style-type: none"> • Enhanced number and range of experience packages for the Region • Increase 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.	<ul style="list-style-type: none"> • Increase visitation, consumption and experiences by the drive markets in the Region • Action plans for the coordination of waste, signage and infrastructure.
TNT	TTE	3. Tourism NT, TTE and industry to support destination awareness and promote the Region's identity.	<ul style="list-style-type: none"> • Enhanced regional identity awareness amongst visitor markets • Increase 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, LDM	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.	<ul style="list-style-type: none"> • Increase visitation, consumption and experiences in the Region.
TNT		5. Leveraging the broader NT brand and destination marketing activities, develop and define a regional identity.	<ul style="list-style-type: none"> • Definition and articulation of a regional identity • Increased awareness of the Region's identity.

Investment attraction initiatives

The Big Rivers Region has several proven tourism product offerings motivating visitation to the Region and has many product opportunities that are yet to be developed, or which could be enhanced to enable a higher quality product offering through private-led 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 72%
- NT destination satisfaction survey data identified feedback that opportunities exist to improve accommodation, destination awareness, value for money and food options in the Region
- Comparative advantages and opportunities to be developed in the Region are closely aligned to visitor demands (unique, nature-based, cultural tourism opportunities).

Leads:	Partners:	Actions:	Outcomes:
DITT	DCM&C, TTE, Hospitality NT, TNT, PIT	1. Building on opportunities identified in the DMP, DITT and DCM&C in partnership with TTE, 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.	<ul style="list-style-type: none"> • Establishment of a structured approach to tourism investment attraction and coordination in the Region • Increased tourism investment in the Region.
TNT	PIT	2. The PIT to develop and maintain a formalised framework for the articulation and development of investment initiatives in the Region.	<ul style="list-style-type: none"> • A prioritisation matrix to inform the DITT and DCM&C investment pipeline framework.
TNT	PIT	3. Align industry support and grant funding program outcomes with DMP priorities.	<ul style="list-style-type: none"> • Increased quantity and quality of tourism experiences in the Region • Prioritised Tourism NT grants 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, grant rounds or infrastructure implementation.	<ul style="list-style-type: none"> • 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.	<ul style="list-style-type: none"> • Increased tourism investment in the Region.

Acronyms

ATC - Aboriginal Tourism Committee	DTFHC - Department of Territory Families, Housing and Communities
CLC - Central Land Councils	ISACNT - Industry Skills Advisory Council NT
DCM&C - Department of the Chief Minister and Cabinet	NLC - Northern Land Council
DIPL - Department of Infrastructure, Planning and Logistics	PIT - Project Implementation Team
DITT - Department of Industry, Tourism and Trade	TNT - Tourism NT
DMP - Destination Management Plan	TTE - Tourism Top End

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 6.

Table 6 - Priority product development opportunities in the Big Rivers Region

	Product opportunities	Product status	Level of stakeholder support	Current status	Estimated scale of investment	Possible action
Katherine	Establish quality accommodation offerings	Existing	Extensive	Study in progress	High	Market assessment
	Develop quality night time experiences	New	Concentrated	Identified opportunity	Medium-High	Market assessment/ grant/funding application
Nitmiluk National Park	Develop multi-day high-end walking options (guided and FIT) for Jatbula trail	Existing	Concentrated	Partially implemented	Medium - high	Market analysis
	Night time experiences in Nitmiluk National Park	Existing	Concentrated	Identified opportunity	Medium-High	Market assessment/ grant/funding application
	Implement Leliyn (Edith Falls) master plan developments	Existing	Extensive	Designs in progress	High	Business case
Limmen National Park	Develop additional infrastructure	New	Concentrated	Identified opportunity	Medium - high	Business case
	Enhance access to additional natural attractions in the Park	New	Concentrated	Identified opportunity	Medium - high	Business case
Mataranka	Implement Elsey master plan developments	Existing	Broad	Design in progress	Medium – High	Business case
Numbulwar	Develop tourist drive route linkage to East Arnhem Land	New	Concentrated	Identified opportunity	Medium - High	Business case
Keep River NP	Enhance access to Keep River NP natural attractions (e.g. Bungle Bungle like formation)	New	Concentrated	Identified opportunity	Low-Medium	Market assessment
Timber Creek	Establish a fishing tour operator	New	Concentrated	Identified opportunity	Medium - high	Market analysis
Victoria River	Establish a river cruise near Victoria River Roadhouse	New	Concentrated	Identified opportunity	Medium - high	Business Case

Legend	Level of stakeholder support		Estimated scale of investment (\$AUD)	
Nature-based offerings	Concentrated	Local community, individual or single Govt. agency	High	+1 million
Drive – journey 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 the implementation of the DMP. The PIT consists of representatives from:

- Tourism Top End
- Northern Land Council
- Katherine Town Council
- Roper Gulf Regional Council
- Victoria Daly Regional Council
- 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 ten 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 review 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.





Bitter Springs – Elsey National Park



Daly Waters Pub – Daly Waters

2 The Big Rivers Region

The Big Rivers Region comprises of a vast area, extending between the western and eastern borders of the Northern Territory and making up much of the northern land mass. It hosts a range of unique natural environments including vast rivers, tropical, rocky and savannah areas. This diversity is mirrored in the destination’s experiences, which focus on Aboriginal cultural offerings, unique natural environments, sport and adventure activities and history and heritage experiences.

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)

9,700
direct jobs

\$1.2 billion
indirect (GSP)

7,400
indirect jobs⁴

\$2.4 billion
total GSP

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.⁵

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

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

The Big Rivers Region Destination Management Plan offers a strategic, strengths-based approach to development of the tourism industry over the next 10 years.

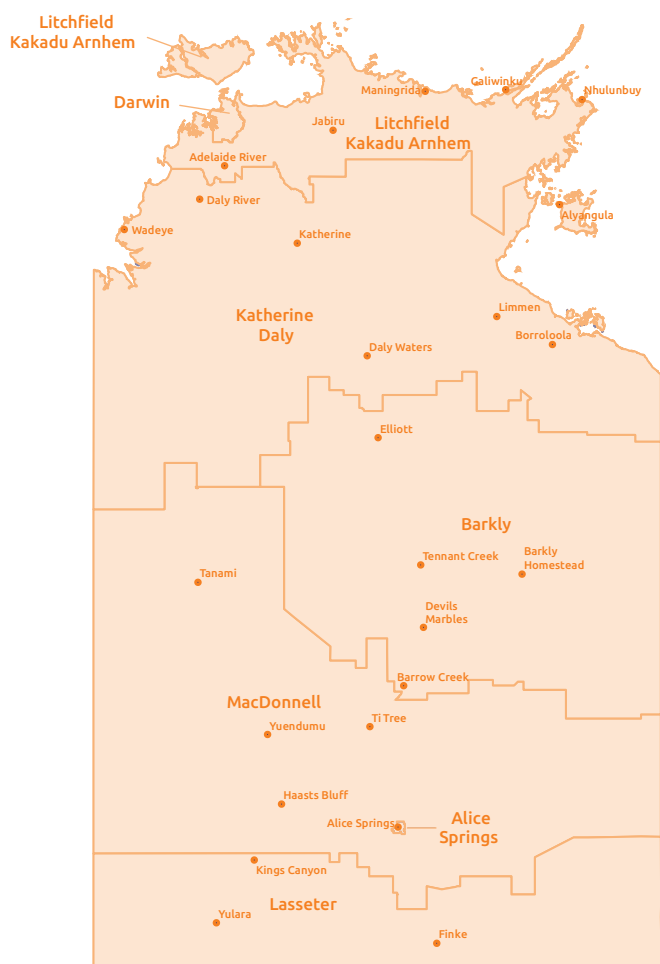
⁴ State Tourism Satellite Account, Tourism Value to the NT

⁵ Tourism NT, *NT’s Tourism Industry Strategy 2030*.

Big Rivers Region

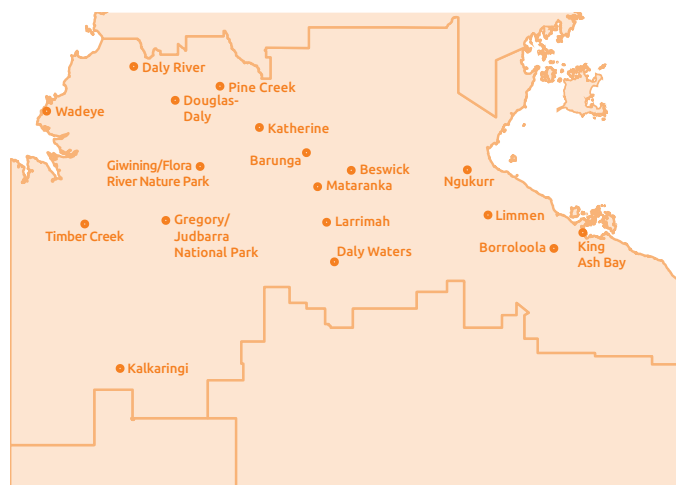
The Big Rivers Region (the Region) covers an expansive 360,634 square km.⁶ It begins south of Kakadu National Park and extends down to Kalkaringi, incorporating the width of the Territory from Western Australia to the Queensland border. The Region includes several major rivers, and hosts a large regional centre in Katherine, with 10,623 residents.⁷ The Big Rivers Region comprises four distinct local government areas (LGA) and is listed as Katherine Daly in Figure 2.

Figure 2 - Big Rivers map



Source - TRA, *Tourism Regions Maps, NT*

Figure 3 - Big Rivers Region – inset map (not to scale)



Social and economic context

The Region's social and economic profiles highlight opportunities for growth, with an increase in Gross Regional Product (GRP) of 16.8% in the last two years.⁸ Despite this, population growth in the Region is limited.

The Region's estimated resident population in 2019 totalled 24,899 residents, representing 10.1% of the NT population.⁶ Like much of the Territory, population attraction and retention is a key challenge for the Region, with a stagnant population trend from 2011 to 2016, at an increase of only 0.8% for the period.⁶

There are 952 registered businesses in the Region, representing about 6.5% of all NT registered businesses. The value of all goods and services of the Region (GRP) is \$1.92 billion, comprising 8.2% of the Territory's total economic value. According to economy.id, the leading industries in the Region in 2018/19 by value include:

- Mining (\$586.7 million)
- Construction (\$291.3 million)
- Public administration and safety (\$190.6 million)
- Agriculture, forestry and fishing (\$150.5)

Comparatively, Tourism Research Australia which considers the broad economic impacts of tourism across the economy, highlights that the tourism industry added \$155.8 million to the Region's economy in 2017/18, establishing tourism as a leading industry for the Region. Furthermore, in 2017/18, the Big Rivers Region directly employed 1,133 people in the tourism industry, approximately 10% of the working population.¹⁰

Appendix B discusses the Region's socio-economic profile in more detail.

The economic profile for the Region includes the three local government areas of Victoria Daly Regional Council, Roper Gulf Regional Council and Katherine Town Council, in alignment with national data collection and reporting standards. For completeness, a discussion of West Daly Regional Council is included in Appendix B.

⁶ Profile.id, *RDA Northern Territory: Katherine Town Council LGA, Victoria Daly Regional Council LGA, Roper Gulf Regional Council LGA, West Daly Regional Council*.

⁷ Profile.id, *Katherine Town Council LGA*.

⁸ Economy.id, *Big Rivers Region: Gross Regional Product*

⁹ Economy.id, *Big Rivers Region: Value added*.

¹⁰ Tourism Research Australia, *Regional Tourism Satellite Account 2017-18: Katherine Daly*.



Tourism offerings in the Region

The Region is well known for its tourism opportunities, including the experience available through the notable Nitmiluk National Park. Tourism in the Region is built around unique natural environments, sporting and recreational experiences, Aboriginal culture, and pioneering history. The Region offers an extensive range of tourism experiences, and opportunities for development of tourism products.



Destinations of the Region

Many destinations of significance exist in the Region, creating a diverse tourism offering. Key locations currently offering tourism experiences include:

- **Douglas-Daly**
- **Daly River**
- **Pine Creek**
- **Katherine**
- **Mataranka**
- **Barunga**
- **Beswick**
- **Timber Creek**
- **Kalkaringi**
- **Larrimah**
- **Daly Waters**
- **Borrooloola**
- **King Ash Bay**
- **Ngukurr**
- **Judbarra/ Gregory National Park**
- **Elsey National Park**
- **Giwining/Flora River Nature Park**
- **Nitmiluk National Park**
- **Keep River National Park**
- **Lorella Springs**
- **Butterfly Gorge Nature Park**
- **Umbrawarra Gorge Nature Park**
- **Tjuwaliyn (Douglas) Hot Springs Park**
- **Douglas River and Daly River Conservation Areas**
- **Barranyi (North Island) National Park**
- **Caranbirini Conservation Reserve**
- **Cutta Cutta Caves Nature Park**
- **Limmen Bight Marine Park**
- **Limmen National Park.**

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



Nature, sporting and recreational activities

The Region hosts many natural attractions, including caves, swimming holes, hot springs, and the iconic Nitmiluk Gorge, a system of 13 gorges carved into ancient sandstone, extending into high cliffs above an abundant river system.

The landscapes in the Region range from lush vegetation to savannahs, delivering a contrast between the outback and the tropics. Wildlife presents another key attraction to the Region, noted for its richness of bird species and barramundi.

Multiple nature-based activities capitalise on the Region's natural assets, including bushwalking, hiking, camping, stargazing, and mountain biking.

Fishing has been identified as a major attraction to the region, however there is limited commercial product offering in this space outside of King Ash Bay and Daly River.

Multiple National Parks and nature reserves exist in the Region to protect, conserve and enable visitors to experience these environments.



Aboriginal culture

Aboriginal culture has existed across Australia for tens of thousands of years, with this deep history and culture present throughout the Region. A variety of Aboriginal tourism experiences are available in the Region, from shared Aboriginal lands, arts and cultural displays and exhibits, events celebrating culture to storytelling and guided cultural tours.

Aboriginal lands such as Nitmiluk National Park can be used to share a cultural connection with visitors. Additionally, multiple Aboriginal communities, tourism operators and arts and cultural centres enable visitors to engage in Aboriginal cultural activities and experiences, through attractions such as arts and cultural centres, tours, and community festivals.



History

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.



Bitter Springs – Elsey National Park

3 Destination management planning

The Big Rivers 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, 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 Big Rivers 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 fabric 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 Region's DMP includes:

- Defining the destination and its access points
- Understanding the market and offering
- Engaging stakeholders to consider the vision for the future of the destination
- Using a clear, structured and well communicated process to engage all stakeholders in the delivery of the vision.

Imperative for destination management planning

The *NT's Tourism Industry Strategy 2030* (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 Destination Management Plans to:

- Identify investment-ready opportunities across regions, including new experiences and products to be delivered by the private sector, and core infrastructure to be delivered by the public sector
- Identify priority segments for the regions.¹¹

The Region's 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 avoiding duplication and inefficiencies limiting destination outcomes.

The development of the DMP sought to actively engage a broad range of stakeholders, including those outside of the tourism industry that contribute to the development of destinations.

Key stakeholder groups included:

- Department of Prime Minister and Cabinet
- Gurindji Aboriginal Corporation
- Jawoyn Association Aboriginal Corporation
- Joint Management Committee of Giwining Nature Park
- Joint management committee of Judbarra/Gregory National Park
- Katherine Town Council
- 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
- Roper Gulf Regional Council
- Traditional Owners of Keep River National Park
- Victoria Daly Regional Council
- West Daly Regional Council
- Yugul Mangi Development Aboriginal Corporation.

A range of guidelines, plans and agreements establishing the vision, focus and plans of the stakeholders impacting destination management planning in the Region have been considered in this study to identify opportunities to leverage collective action, and support strategic investment and allocation of resources in the Region. A summary of these considerations is outlined in Appendix D.

¹¹ 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*, regional municipal plans, Parks and Wildlife NT parks management plans and visitor experience plans. Through a combination of document review and desktop research, an understanding of the current state and strategic directions in key destinations in the 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 through 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 across tourism and supporting industries, including input from government, operators 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.





Joe Creek Walk – Judbarra National Park



Ranger Talk – Keep River National Park

4 Trends in regional tourism

The Big Rivers Region offers what travellers increasingly want: unique, authentic, natural and cultural experiences. Regional tourism trends confirm that these assets draw visitors to regional destinations, presenting a key strategic opportunity for the focus of industry development efforts.

Introduction

The Big Rivers Region offers several tourism experiences that are currently in high demand: unique, authentic, cultural, and natural experiences. The Region is also close to and easily accessed from Darwin, which is a key point of access for those travelling the NT.

However, challenges in attracting tourists remain for destinations like the Big Rivers Region, including competing with capital cities in attracting visitors to regional Australia.

Over the next 10 years, the tourism industry in the Region has the opportunity to leverage its comparative advantages in nature based and eco-tourism to capitalise on current tourism trends. The Region could also expand its festival and event tourism to maximise value from 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.¹²

Additionally, the number of international visitors grew 2% in 2019, with international visitor spending also reaching a record, at \$45.4 billion.¹³

Tourism Research Australia's report *State of the Industry 2018* identified the Asian middle class and the youth market are driving growth of 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.¹³ The increasing number of Asian visitors are placing greater importance on cultural experiences and immersion.¹⁴

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. As a segment, they are particularly seeking 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.

While both international and domestic visitation is increasing in Australia, enticing visitors to regional and remote Australia remains a challenge.

Research by Deloitte Access Economics¹⁵ explains that those most likely to visit regional destinations in Australia (in order of demand) include:

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

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

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

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

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

These barriers to regional tourism highlight the need for targeted tourism marketing and communication to viable markets, and the importance of coordinated tourism planning that considers strategic approaches to tourism markets, such as greater information sharing and travel planning support to Chinese markets.

¹² Tourism Research Australia, *Travel by Australians year ending December 2019*.

¹³ Tourism Research Australia, *International visitors in Australia year ending December 2019*.

¹⁴ Tourism and Events Queensland, *Queensland Asia Tourism Strategy 2016-2025*.

¹⁵ 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 the results of a survey on regional event tourism in 2014 which found that events 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 Economic 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 traveller, sporting events were the most popular form of event on their most recent trip, they were most often inspired by previous travel to the destination, and they stayed on average 6.7 nights in regional Australia compared to 6.1 in capital cities¹⁶. 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 Barunga Festival in the Big Rivers Region is an example of the benefits events can have in driving tourism in the Region. While Barunga is a closed community requiring a permit to enter, its annual Festival attracts over 4,000 visitors.¹⁷ The festival celebrates Aboriginal culture through cultural, sporting, and music events over a weekend. Despite not offering accommodation, Barunga has established itself as a tourism destination through its annual Festival.

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 increasing 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.¹⁸

The Region is already recognised for its ability to deliver Aboriginal tourism experiences.¹⁹ Among other regional areas, the Region had the fourth highest proportion of visitor nights relating to demand from international Aboriginal tourism visitors, only after Lasseter, Alice Springs and MacDonnell Ranges, and Litchfield/Kakadu/Arnhem.

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.)¹⁹

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.

¹⁶ Deloitte Access Economic, 2019, Understanding visitor regional dispersal in Australia.

¹⁷ Barunga Festival, About. (<https://www.barungafestival.com.au/about>)

¹⁸ Tourism NT, *Combined Snapshot Year Ending September 2019*.

¹⁹ Australian Government Department of Foreign Affairs and Trade, *Indigenous Tourism Surge*. <https://dfat.gov.au/about-us/publications/trade-investment/business-embassy/Pages/january-2019/indigenous-tourism-surge.aspx>



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.”²⁰ 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.²¹ 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.²²

The demand for nature-based tourism, and broad recognition for the quality of nature tourism in Australia presents significant opportunities for the tourism industry in the Region, which is known for its natural wonders, notably Nitmiluk National Park. The Region also has many underdeveloped parks and conservations areas, presenting the potential to further develop nature-based tourism offerings.

Australia’s National Parks and nature parks are seeing more visitors than ever before. In 2017-18, Australian terrestrial reserves received over 1.47 million visitors, an increase of 6.5% from 2016-17.²³ In addition to the opportunities this demand presents, the management of tourism to uphold the ecological value of nature destinations including suitable infrastructure and services planning is an important consideration in destination management planning.

Key findings

Trends in regional tourism in Australia and the NT highlight the significant opportunity to encourage sustainable growth in the NT tourism industry, through the maximisation of comparative advantages which align closely with visitor market demands.

The trends also point to the importance of different approaches to growth by the industry, such as considered strategies to attract visitors to regional Australia, strategic investment in events and festivals, long-term investment in Aboriginal tourism, and development of nature based tourism which maintains the recognised quality and natural values of nature destinations in Australia.

²⁰ EcoTourism Australia, *Nature Based Tourism in Australia Manifesto*.

²¹ Deloitte Access Economics, *Understanding visitor regional dispersal in Australia*.

²² Tourism Australia, *Traveller Snapshot: Global*.

²³ Australian Government Director of National Parks, *Annual Report 2017-18*.



Nitmilluk Dining – Nitmiluk National Park

5 Stakeholder consultation

Stakeholders of the Big Rivers Region see great potential for growth and opportunities for prosperity across the region. They vocalised a strong desire for a destination management plan that provides a strategic guide, and mechanism for greater collaboration in the development of the tourism industry.

Introduction

Stakeholders were engaged from the Region to co-develop the DMP. Stakeholders offer critical consideration to the plan by providing:

- 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.

Engagement approach

Stakeholders were initially identified through desktop research, and an iterative approach of contact gathering with government Departments and representative organisations.

Stakeholders were notified of the study and consultation process via phone and email contact throughout December 2019 and January 2020. All consultation activities were prefaced by a formal letter of advice outlining the purpose and intent of the engagement.

Consultation sessions were deliberately designed to be flexible, including offering broad timelines for engagement, and keeping formal appointments to a minimum.

Qualitative data analysis methodology

Stakeholders were engaged both face-to-face and through electronic methods. Over 65 individuals participated in a face-to-face meeting or one-on-one phone call. Face to face consultations occurred in seven major centres across the Big Rivers Region:

- Timber Creek
- Katherine
- Daly Waters
- Borroloola
- King Ash Bay
- Beswick
- Pine Creek.

All stakeholders were offered an opportunity to engage individually. Workshops were also offered when coordinated through local representative bodies, taking place in Katherine and Timber Creek. A survey was established to capture insights from stakeholders that could not participate in face-to-face or one-on-one phone calls. The survey was closely aligned to the discussion topics of the consultation sessions, allowing comparative analysis.

Thematic analysis of notes taken during stakeholder consultation was used to identify themes and patterns. The survey augmented the findings from consultations.

Consultation analysis resulted in six key themes:

- Aboriginal tourism capacity
- Big Rivers Region tourism attractions
- Collaboration and coordination
- Tourism industry development
- Destination vision
- Current and potential visitors' markets and product opportunities.

Consultation outcomes

Overall, stakeholders were positive about the future of tourism in the Big Rivers Region. While challenges are expected, the Region has strong potential to increase and develop a sustainable tourism sector.

Aboriginal tourism capacity

Aboriginal tourism capacity was a common topic of discussion in the consults. It was noted that a broad spectrum of capability exists in the Region, and where capacity is limited, significant investment would be required to build and develop the capacity. Arts and culture were discussed, and notably, stakeholders expressed confusion about the status and progression of the NT Arts Trail.

Traditional landowner engagement in National Parks and visitor experience through joint management plans and local decision-making agreements was identified as a key priority and significant opportunity for destination development in the Region. This is because Traditional Owners possess existing capital infrastructure, systems, and knowledge which should be leveraged in Aboriginal tourism 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 Northern Land Council, costs, uncertainty for investors, and length of time. These issues concerned stakeholders and stopped them from pursuing development and progressing tourism opportunities.

Big Rivers Region tourism attractions

Stakeholders identified existing tourism attractions in the Region, including a range of physical, intangible, and lifestyle attributes that attract visitors. Physical attractions included natural attractions such as rivers, fishing, wilderness/outback/bush, Nitmiluk Gorge, hot springs and swimming, and National Parks and reserves. Other physical attractions included culture and art, driving/touring, stockman and outback camp experiences, and history and heritage.

Intangible attractions included adventure, a sense of the unknown, uniqueness, being rural and away from a city, roughness, diversity, unpredictability, and personal connections. When asked to consider attractions from the perspective of residents, stakeholders mentioned the sense of community, environmental beauty, opportunities for progression and prosperity, passion/love for the community, feeling safe, and availability of sports and recreational activities. Other services to support tourism were identified, including food, accommodation, customer engagement, swimming pools, community events, and safety.

Collaboration and coordination

Stakeholders noted the importance of coordination and collaboration of services and tourism activities across the Region. Key stakeholder groups were identified as:

- Government
- Towns/community in the Region
- Volunteers
- Defence sector
- Agriculture sector.

Limited success in attempts to engage government by tourism operators was highlighted during the consultation.

Stakeholders identified that a small cohort of volunteers in the community are responsible for many of the successful tourism outcomes, which has led to fatigue, burn-out, and stagnation. It was noted that grey nomads and retired community members could potentially drive projects and community development initiatives.

Engagement with the defence sector was identified as limited, although could provide significant opportunities both as a potential visitor market, and a human and knowledge capital resource contributing to the development of capacity in the Region.

Engagement with the agriculture sector is also limited, however the sector holds an important relationship to the tourism sector, as it is a significant influencer of economic activity within the Region and supplies products used in the tourism sector. The industry also presents an opportunity to develop a provenance product offering and experiences in the Region.

Community engagement was viewed as both a challenge and an opportunity, with personal relationships identified as a key mechanism for effective advocacy efforts. The lack of mechanisms for operators and stakeholders across multiple agencies, levels of government, and interest groups to engage was highlighted as a key challenge.

Multiple coordination and collaboration challenges were highlighted such as: disconnect between government and community in decision making, significant red tape, lack of existing coordination and collaboration, lack of strategic leadership driving outcomes, lack of engagement and commitment to drive outcomes in regional and remote areas, challenges in the maintenance of community cohesion, limited funding, and multiple competing priorities.

These issues often resulted in stakeholders driving their own outcomes and eventually giving up.

Tourism industry development

Stakeholders confirmed their support for investment in tourism, noting several planned tourism developments in the Region such as investment at Nitmiluk Gorge and Katherine amongst others.

Challenges impacting the tourism industry were focused around environmental matters, accessing funding, and infrastructure needs.

Environmental challenges included weather conditions, the cost of maintaining insurance, and contamination concerns associated with RAAF Base Tindal.

Stakeholders noted that funding presents a challenge, particularly with sourcing funding for industry development. Stakeholders identified the need for infrastructure such as accommodation offerings, local service infrastructure, roads, internet, signage, waste, river access, and public and private transport services.

Reliance on backpackers to staff local businesses was highlighted as a challenge, with businesses struggling to attract employees, especially chefs and cooks.

Stakeholders were also concerned about the availability and accessibility of information for tourists, while parks and wildlife were identified as a key attraction and potential opportunity to support the tourism industry, with the appropriate funding.

The lack of consistent identity for the Region was highlighted and the DMP was welcomed as an opportunity to create a clear and common identity for the Region.

Destination vision

Stakeholders noted that a regional strategy and approach would be necessary to develop tourism across the Region. While Katherine is recognised as the main destination, it was noted that development of destinations outside Katherine would be essential to enhance overall tourism outcomes. A common vision for all stakeholders was to enhance the sense of vibrancy and attraction in their towns and communities, however while stakeholders in larger community centres generally wanted to drive increases in tourism visitation, stakeholders in smaller communities expressed a desire to see controlled and incremental growth in visitation, and a focus on high value markets.

Stakeholders identified several key principles for tourism and destination development planning:

- Positive client experience
- Genuine interest and care for visitors
- Communicate the stories of the Region to visitors
- Ensure visitors feel welcome and safe
- Authentic experiences
- Tailored and personalised experiences.

Stakeholders identified potential ideas to further developing tourism in the Region and key tourism destinations.

For each key location, stakeholders identified key experiences, current visitor markets, opportunities for new products, and opportunities for existing products.

Current and potential visitor markets and product opportunities

The current visitor market was identified as:

- Self-drive tourists
- Intrastate tourists (focused on fishing and camping)
- Domestic and international tourists (focused on Darwin – Kakadu – Katherine – Darwin loop)
- Travellers focused on learning and gaining new experiences
- Travellers seeking to engage with community
- Budget travellers
- Schools and students
- Service workers
- Bird watchers
- Business/conference market
- Families
- Grey nomads.

The defence market and luxury market were identified as new potential markets.

There is an opportunity to develop tourism in Timber Creek, Borroloola and Daly Rivers. These locations currently provide limited offerings and developing them will leverage the established capability and focal point in the Region, Katherine, while supporting the expansion of the regional product offering.

Rather than increase the range of tourism offerings, stakeholders noted the need to enhance the quality and quantity of experiences.

Accessible tourism

During consultations, stakeholders were prompted to consider opportunities to engage with the accessible tourism market. While many stakeholders verbalised action or consideration for approaches to better enable persons with mobility challenges to access tourism product offerings, stakeholders frequently cited cost as a barrier to action.

During consultations it was confirmed that accessibility offerings are being established at Nitmiluk Gorge, representing an opportunity to scale this more broadly across the Region, particularly in Katherine and across the Region where drive tourism can be better supported through the prioritisation of information about accessibility offerings.

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 E.

Tourism destinations

With over 360,000 square km of land, significant opportunity exists to expand tourism beyond national parks to include Aboriginal lands and pastoral properties throughout the Region. The natural beauty of the Region with spectacular escarpments and vast river systems presents real opportunity for non-pastoral use on existing pastoral leases. Such uses are demonstrated by the growth in drive apps promoting visitation and camping experiences on a range of sites, including pastoral and farming properties throughout Australia.

In the Gulf, there are a number of properties that are currently offering camping experiences on pastoral leases, varying in size, offerings and maturity.



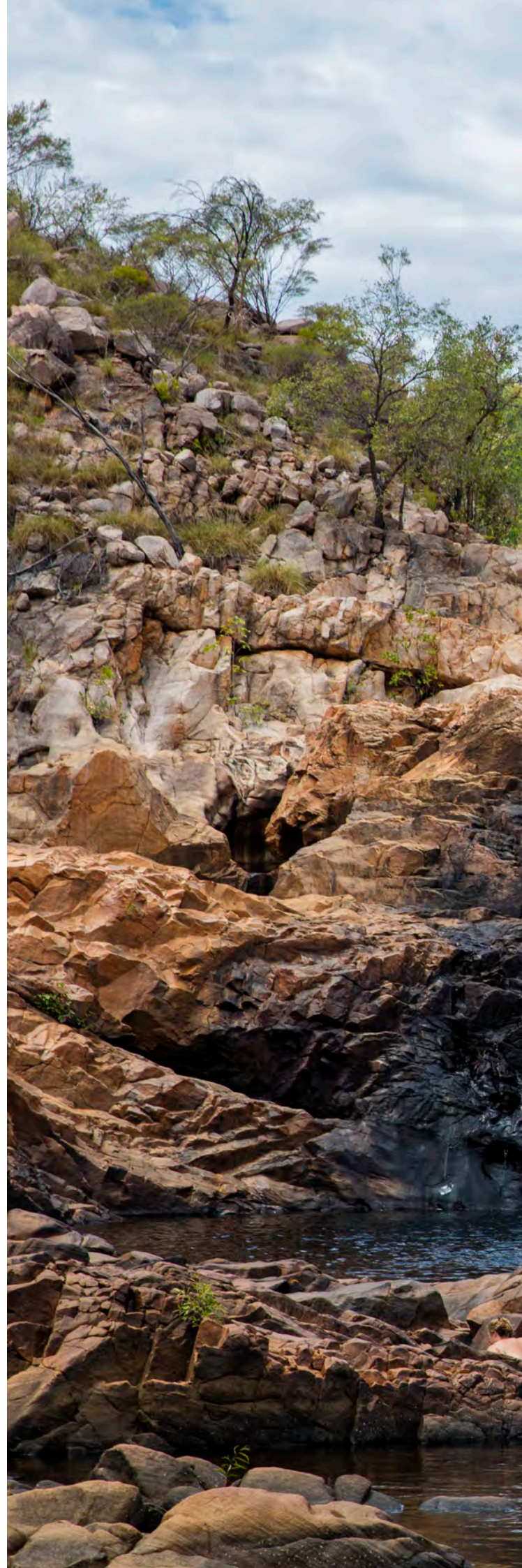
Marksie's Stockamn's Camp - Katherine

Key findings and direction

This consultation process identified opportunities to unlock further tourism potential in the Region. This Region encompasses a diverse range of geography, demography, economy, and stakeholder cohort. This creates a complex scenario validating the need for strategic planning of destination development.

Key priorities for investigation and action in the DMP include:

- Aboriginal tourism capacity building to enhance the quantity and quality of available products and experience in the Region
- Red tape reduction and other approaches to improve transparency, accountability, time in determining mutually satisfactory outcomes in land access process
- Building and leveraging the success of local decision-making agreements and multi-agency partnerships in developing Aboriginal tourism capacity across the Region
- Progression of the NT Arts Trail to support and enhance arts and cultural experiences and product packaging in the Region
- Leveraging and enhancement of NT Tourism branding to align with the unique attributes and visitor attractions in the Region
- Opportunities to package product offerings across the Region and between regions across the NT
- Mechanisms to improve stakeholder engagement, coordination and collaboration efforts, to drive efficiencies, innovation and efforts across the industry
- Approaches to resourcing and developing business capacity across the Region to enhance the overall quantity and quality of tourism offerings and achieve sustainable growth
- Opportunities to enhance destination marketing of the Region
- Opportunities to enhance accessible tourism in the Region.





Leliyn (Edith Falls) – Nitmiluk National Park



Mimi Aboriginal Arts and Crafts - Katherine

6 Visitor market analysis

Nature, accessibility and unique experiences are prominent themes of the highly rated travel experiences and attraction of return visitors to the Big Rivers Region.

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

Tourism contributed \$155.8 million to the Big Rivers Region GRP in 2017/18, a 10.1% increase from the previous year.²⁴ Tourism consumption in the Region was \$321 million, with the categories for goods and services with the highest spend being:

- Long distance passenger transportation
- Takeaway and restaurant meals
- Fuel
- Accommodation.

Figure 4 summarises key characteristics of these three visitor markets.

Evidencing the importance of the drive market, visitors typically arrive by private vehicle, rental car, or motorhome/campervan. The drive market accounts for 78% of all visitors to the Region. Of the visitor markets to the Region, the following proportion access the Region by driving:²⁵

- 90% of intra-Territory visitors
- 62% of interstate visitors
- 76% of international visitors.

²⁴ Tourism Research Australia, *Regional Tourism Satellite Account 2017-18*: Katherine Daly.

²⁵ Tourism NT, *Tourism NT Regional Profile*: Katherine Daly.

Tourism consumption data confirms the central role of the drive market to tourism in the Region. Further details of visitor consumption are provided in Appendix F.²⁴

Domestic tourists are the most prominent visitors to the Region. In 2017/18, the Region received 325,000 visitors, 90% of which were Australian visitors.

Across 2016-2018, the Region received an average of 186,000 (53%) intra-Territory visitors, 132,000 (37%) interstate visitors, and 35,000 (10%) international visitors annually. The top international sources for visitors were Germany, United Kingdom, and France.²⁵

More information about the Region's visitor market can be found in Appendix F.

This emphasises the critical importance of road access, road infrastructure and vehicle services for tourism in the Region. It also points to the level of planning required by travellers to the Region.

Of visitors driving, most were visiting for leisure (holiday and/or visiting friends and family), with the self-drive leisure market accounting for 49% of all domestic visitors to the Region over the last three years. From this cohort the majority (58%) were from the Territory. Domestic leisure drive market visitors typically stay for short periods of time, with 79% staying three nights or less.²⁵

For international travellers who visited the Region, most entered the country through a different state before travelling to the Region. Just 24% of the international visitors who visited the Region entered the country through Darwin, pointing to the importance of all points of access to the Region, which include Darwin, Queensland, Western Australia and Central NT, as well as the importance of cross-promotion with other regions and States.

Nearly all international visitors to the Region also visited the Greater Darwin region during their visit, establishing the important role of product packaging and collaboration across the Territory's regions in supporting tourism outcomes.

Of visitors to the Region, persons visiting for business made up 40% of the total market over the three years from 2017 to 2019.²⁶ Of the business travellers to the Region almost all are domestic travellers.²⁷ On average business travel in the NT involved a stay length of 4.6 nights in 2019²⁸, this compares to the average length of stay of all domestic visitors to the Region which averaged 4 nights over the three years 2017 to 2019²⁹.

Youth, Backpacker and WHM data shows 30% of the total visitors to the Region are within the youth (15-29 years old) sector, which aligns with the adventurous nature of the Region. Across the Territory, 70% of the WHM market stayed 1-14 days, and the main work undertaken (25%) was farm work, which is not a favoured work type by the WHM.³⁰ The Region captured a high percentage (32%) of the 4000 working holiday makers (WHM's) whose main job location was the Territory, though this still represented a small proportion of the total visitor numbers. This, as well as other data insights, indicate that the Region, whilst attractive to the youth market, does not offer work favoured by WHM's.

More information about the Region's visitor market can be found in Appendix F.

Figure 4 - Visitor market profile



Source: Tourism NT, *Regional Profile: Katherine Daly, Year ending June 2016-2018*.

²⁴ Tourism Research Australia, *Regional Tourism Satellite Account 2017-18: Katherine Daly*.

²⁵ Tourism NT, *Tourism NT Regional Profile: Katherine Daly*.

²⁶ Tourism NT, *Katherine Daly Regional Profile Report, 2017-19*

²⁷ *ibid*

²⁸ Tourism Research Australia, *Domestic Business Visitors, 2019*

²⁹ Tourism NT, *Katherine Daly Regional Profile Report, 2017-19*

³⁰ Tourism NT, *Youth, Backpacker and Working Holiday Maker Visitation to the NT, Year ending Dec 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 by Tourism and Events Queensland.

ReviewPro data analysis

NTG 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 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 79% of mentions rated as positive, and an overall GRI of 87%. 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.

The Big Rivers Region GRI reflects feedback relating to 20 establishments/places, including hotels, art galleries, campgrounds, museums, hot springs, and other tourism experiences, over the period from 2 Dec 2018 – 2 Dec 2019. Each individual place received a GRI, the lowest of which was 83% and the highest which was 99.5%. The total number of establishments considered in the GRI is notably lower than the number of establishments available in the Region. Without adequate representation of establishments in the data collection process the ability of the tool to support industry development is diminished.

There were 5,047 reviews during this timeframe, which was an increase of 778 from the previous year.

Almost half of the online review data collected from ReviewPro came from those travelling as a couple, (46%), with reviews from those travelling in a family group representing 25% and the balance split across those travelling alone (13%), travelling in groups (9%) and for business (6%).

In terms of online reputation, the positivity ratings were:

- Global Review Index 79%
- Service 80%
- Location 90%
- Room 67%
- Value 72%
- Cleanliness 69%.

Given very limited responses relating to entertainment and food and drink, ratings for these two categories are not presented. Accommodation providers in the Region have GRIs ranging from 65% to 96%, confirming a significant variation of standards across the Region.

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

- Service had a total of 267 references, being predominantly positive (80% of all references)
- Staff had a total of 1,077 references, being overwhelmingly positive (92% of all references)
- Value had a total of 676 references, being largely positive (71% of all references).

Overall, reviews were positive, but staff received the highest share of positive reviews.

A specific discussion of the ReviewPro data insights is detailed in Appendix G.

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 5.5 for overall satisfaction (on a 7-point scale) was recorded for the Region, with interstate visitors giving their overall experience a much higher satisfaction rating than international visitors (62, compared to 38).

With regard to feedback on the Katherine region:

- Hotels received the lowest satisfaction score out of all NT regions
- Many people didn't know about the accessibility of the Katherine Hot Springs
- Issues of value for money were raised in regard to Nitmiluk Gorge
- While pub meals were attractive for some, for others seeking fresh food/health options and for those with dietary requirements, food in Katherine was disappointing.

Overall, key findings for the NT include 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, however 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 noted the need for upgrades in Parks
- Most people want to experience authentic Aboriginal culture
- Staff hospitality was appreciated across NT
- Katherine hotels were noted for being dated and needing upgrades
- While most people love caravan park experience across the NT, variability was noted, particularly in Katherine.

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 significant value of nature and wildlife experiences in the Region provided through National Parks and landscapes as well as authentic Aboriginal tourism experiences.

Operators identified a lack of destination marketing as an issue, with opportunities to address this identified as leveraging the scale of investment in marketing provided through Tourism NT and national operators such as Qantas, as well as building on the success of Nitmiluk Tours in delivering both quality contemporary and cultural tourism experience. The success of Nitmiluk Tours offers a model to guide the development of successful Aboriginal tourism products across the Territory.

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

Opportunities to develop the industry through the establishment of contemporary products (e.g. dining), and the quality of accommodation in the Region 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. 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 were also noted to 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.

Notably, repeat visitors are more likely to visit regional destinations and seek 'off the beaten track' experiences, highlighting an opportunity for the Region.

Seasonality and the lack of access to certain areas of the Region during the wet season are considered another barrier to attracting visitors. Importantly the Top End's wet season aligns with a key time when the British market travels overseas (November to April), suggesting enhanced access to support in planning travel during this time is important.

Destination awareness

Compared to the Red Centre, which is well-known as a bucket list destination, the Top End of the Territory including the Region is lesser known around the world.

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.

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

It was noted that there is a misconception among German travellers that the Australian Outback is desert only and promoting the tropical landscapes may attract more visitors from this market.

Product offering

Although the Territory has made improvements in product offerings and developed products such as Aboriginal tourism, there is a view that the value for money is lower than in other destinations in Australia. New glamping facilities and accommodation options in the Territory were noted as improvements, however some key destinations are still seen to lack product offerings. 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 the 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 the 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, however 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 with their ranking noted below in Table 7.

Table 7 - Associations for NT destinations

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

In terms of net promoter score, Kakadu National Park had the highest of all Australian destinations, Uluru 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 8.

Table 8 - Traveller ranking 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.

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.³¹

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 a disability was \$1.7 billion, 79% of which was overnight spend, accounting for 10% of total domestic spend in Victoria.³²

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 vehicle³³, and older non-working travellers, 81% of which also self-drive.³⁴

Key findings

Visitor demand in 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
- World class nature and wildlife
- Unique experiences (e.g. Aboriginal tourism, The Ghan and getting 'off the beaten track').

Weaknesses and challenges to increasing demand from the international market include:

- Flight availability and cost
- Time
- Destination awareness
- Seasonality
- Product offering.

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

- Promoting the Region in conjunction with other regions or states
- Enhanced marketing to build awareness of the Region's identity and improve travel planning
- Enhanced product offerings and improving perceptions of value for money.

The Region is well-placed to leverage its spectacular nature and wildlife offerings to continue to attract both the domestic and international travel markets, with both identifying 'world-class nature and wildlife' as a primary factor in choosing a travel destination. Investment in road infrastructure and services to support and build the domestic drive market visiting the Region also presents an opportunity to grow tourism in the Region.

³¹ Tourism Research Australia, *Accessible Tourism in Victoria and Queensland*.

³² Ibid

³³ Tourism Research Australia, *Families with Children*.

³⁴ Tourism Research Australia, *Older non-working travellers*



Appendix A - Product development opportunities

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

Figure 5 - Gulf Driver of demand versus Importance to destinations development



Table 9 - Legend for product development opportunities table and scatter graph

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				

Scatter graph ease of implementation		
Hard	Medium	Easy

Table 10 - Gulf Region product development opportunities

	Chart Ref	Product opportunities	Product status	Level of stakeholder support	Current status	Estimated scale of investment	Possible action
Beswick	1	Develop trails to increase access to sites	Existing	Concentrated	Identified opportunity	Low	Grant/funding application
	2	Develop tourist drive route linkage to East Arnhem Land	New	Concentrated	Identified opportunity	Medium - High	Business case
Borroloola	3	Upgrade of history and heritage trail	Existing	Concentrated	Identified opportunity	Low	Grant/funding application
	4	Develop road side near Robinson River community to enable engagement of drive market	New	Concentrated	Identified opportunity	Medium - high	Business case
	5	Development of river access (trail, platforms)	New	Concentrated	Identified opportunity	Low	Grant/funding application
	6	Development of river cruises	New	Concentrated	Identified opportunity	Medium - high	Market analysis
	7	Restart turtle conservation tourism	Existing	Concentrated	Ceased activity	Low - medium	Business assessment; Grant/funding application
	8	Support the re-opening of the Waralungku arts centre	Existing	Concentrated	Ceased activity	Low - medium	Grant/funding application
	9	Development of government administration and visitor centre facility	New	Broad	Planned	Medium – High	Business case
	97	Implement Borroloola streetscaping masterplan	New	Broad	Identified opportunity	High	Business case
Central Arnhem Rd	10	Develop camp grounds to enhance link to East Arnhem Land	New	Concentrated	Identified opportunity	Medium - High	Business case
King Ash Bay	11	Enhanced river access (ramp, trails, platforms)	Existing	Concentrated	Identified opportunity	Low - Medium	Grant/funding application, business case
	13	Establish river tours (transport/guiding only)	New	Concentrated	Identified opportunity	Medium - high	Market analysis
Gulf	12	Develop transport and additional offerings (trails, camps etc) on islands	Existing	Concentrated	Identified opportunity	Medium - high	Market analysis
Limmen National Park	14	Development of tourist hub at Munbililla (Tomato Island) to facilitate cruise operations, provide information, etc.	New	Concentrated	Identified opportunity	Medium - high	Business case
	15	Access and tour offerings to rock art and cultural sites (in consultation with Traditional Owners)	New	Broad	Identified opportunity	Low	Grant/funding application
	16	Develop four wheel driving trails commencing from Munbililla (Tomato Island) with tag-along options	New	Concentrated	Identified opportunity	Medium - high	Business case
	17	Expansion of existing outback swimming options	New	Concentrated	Identified opportunity	Medium – high	Business case
	18	Establish a fishing tour operation	New	Concentrated	Identified opportunity	Medium – high	Market assessment
	19	Develop additional infrastructure	New	Concentrated	Identified opportunity	Medium - high	Business case
	20	Enhance access to additional natural attractions in the Park	New	Concentrated	Identified opportunity	Medium - high	Business case
Savannah Way	21	Improved road access for Savannah Way	Existing	Concentrated	Identified opportunity	Medium - high	Business case
Lorella Springs	22	Develop wildlife offerings	New	Concentrated	Identified opportunity	Low - medium	Market analysis
	23	Develop natural environment offerings (e.g. expand swimming options)	New	Concentrated	Identified opportunity	Medium	Market analysis
	24	Develop luxury accommodation	New	Concentrated	Identified opportunity	Medium	Market analysis
Numbulwar	25	Develop campgrounds for visitors	New	Concentrated	Identified opportunity	Low	Market assessment
	26	Develop tourist drive route linkage to East Arnhem Land	New	Concentrated	Identified opportunity	Medium - High	Business case

Figure 6 - Stuart Highway Driver of demand versus Importance to destinations development



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				

Scatter graph ease of implementation

Hard Medium Easy

Table 11 - Stuart Highway product development opportunities

	Chart Ref	Product opportunities	Product status	Level of stakeholder support	Current status	Estimated scale of investment	Possible action
Daly Waters	27	Heritage trail and signage upgrades	Existing	Concentrated	Identified opportunity	Low	Grant/funding application
	28	New heritage show/experience (light show)	New	Concentrated	Identified opportunity	Medium - high	Grant/funding application
Katherine	29	Katherine function centre development	New	Broad	Designs in progress	High	Business case
	30	Re-development of Ghan passenger transport terminal	Existing	Broad	Design in progress	Medium – High	Business case
	31	Expansion of the Katherine arts trail	Existing	Broad	Designs in progress	High	Business case
	32	Revitalisation of Katherine CBD	Existing	Extensive	Designs in progress	High	Business case
	33	Develop wellness offerings linked to Katherine Hot Springs	New	Concentrated	Identified opportunity	Medium – High	Business case
	34	Establish quality accommodation offerings	Existing	Extensive	Study in progress	High	Market assessment
	35	Mountain bike path/trail from Katherine to Nitmiluk Gorge	New	Concentrated	Identified opportunity	Low – medium	Business case
	36	Road bike path/trail from Katherine to Nitmiluk Gorge	New	Concentrated	Identified opportunity	High	Business case
	52	Expansion of existing outback swimming options	New	Concentrated	Identified opportunity	Medium – high	Business case
	93	Wildlife park or experience	New	Broad	Identified opportunity	Medium-High	Market assessment
	94	Develop quality night time experiences	New	Concentrated	Identified opportunity	Medium-High	Market assessment/ Grant/ funding application
	95	Establish a major event	New	Broad	Identified opportunity	Medium-High	Market assessment
Mataranka / Eley National Park	37	History and heritage trail and signage upgrades	Existing	Concentrated	Identified opportunity	Low	Grant/funding application
	38	Establish a fishing tour operation	New	Concentrated	Identified opportunity	Medium - high	Market analysis
	39	Develop local history and heritage product offerings	Existing	Concentrated	Identified opportunity	Low	Grant/funding application
	40	Development of new campground between Mataranka and Bitter Springs	New	Concentrated	Identified opportunity	Medium	Business case
	41	Implement Eley master plan developments	Existing	Broad	Design in progress	Medium – High	Business case
	42	Development of mountain biking trail in Mataranka	New	Concentrated	Identified opportunity	Low – medium	Business case
	43	Develop health and beauty options in Mataranka	New	Concentrated	Identified opportunity	Medium – High	Business case
	98	Implement Mataranka streetscaping masterplan	New	Broad	Identified opportunity	High	Business case
Nitmiluk National Park	44	Enhance Nitmiluk National Park Precinct - new Cultural Centre and entry	Existing	Extensive	Partially implemented	High	Market analysis
	45	Implement Leliyn (Edith Falls) master plan developments	Existing	Extensive	Designs in progress	High	Business case
	46	Establishment of Nitmiluk National Park bike trail and hike offerings	Existing	Extensive	Partially implemented	Medium – High	In progress
	47	Upgrades to Nitmiluk National Park boat jetty	Complete	Extensive	Completed	High	Complete
	48	Develop multi-day high-end walking options (guided and FIT) for Jatbula trail	Existing	Concentrated	Partially implemented	Medium - high	Market analysis
	90	Nitmiluk National Park precinct enhancement - new restaurant and infinity pool	Existing	Broad	Identified opportunity	High	Business case
	91	Nitmiluk National Park precinct enhancement - picnic area development	Existing	Broad	Identified opportunity	Medium	Business case
	92	Nitmiluk National Park precinct enhancement - campground upgrades	Existing	Broad	Identified opportunity	Medium	Business case
Pine Creek	96	Night time experiences in Nitmiluk National Park	Existing	Concentrated	Identified opportunity	Medium-High	Market assessment/ Grant/ funding application
	49	Develop museum and heritage trails	Existing	Broad	Identified opportunity	Low	Grant/funding application
Stuart Hwy	50	Establish bird watching tours and infrastructure	New	Concentrated	Identified opportunity	Low	Grant/funding application
	51	WWII Stuart Hwy redevelopment	New	Concentrated	Identified opportunity	Medium-High	Business case

Figure 7 - Victoria Daly Driver of demand versus Importance to destinations development



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				

Scatter graph ease of implementation		
Hard	Medium	Easy

Table 12 - Victoria Daly product development opportunities

	Chart Ref	Product opportunities	Product status	Level of stakeholder support	Current status	Estimated scale of investment	Possible action
Daly River	53	Development of history and heritage site and tours	Existing	Concentrated	Identified opportunity	Low	Grant/funding application
	54	Establish rivers tours (transport and guiding)	New	Concentrated	Identified opportunity	Medium - high	Market analysis
	55	Develop the local community festival	Existing	Concentrated	Identified opportunity	Low	Grant/funding application
	56	Establish bird watching tours and infrastructure	New	Concentrated	Identified opportunity	Low	Grant/funding application
Judbarra/ Gregory National Park	57	Develop an adventure motorbike trail in Judbarra/Gregory National Park	New	Concentrated	Identified opportunity	Medium	Market analysis
	58	Enhanced access to rock art sites	Existing	Broad	Planned	Low – Medium	Market analysis
	59	Develop an eco-camping experience in Judbarra/Gregory National Park	New	Concentrated	Identified opportunity	Medium – high	Market analysis
	60	Establish caving activities and opportunities in the limestone caves in Judbarra/Gregory National Park	New	Concentrated	Identified opportunity	Low - Medium	Market analysis
	61	Expansion of existing outback swimming options	New	Concentrated	Identified opportunity	Medium – high	Business case
Kalkaringi	62	Enhance local accommodation offerings	Existing	Concentrated	Identified opportunity	Medium	Market analysis
	63	Develop history tours and storytelling products for public and education markets	Existing	Concentrated	Identified opportunity	Low	Grant/funding application
	64	Establish a local cultural centre	New	Concentrated	Designs established	Medium - High	Market analysis
	65	Develop rock art and cultural tours	New	Concentrated	Identified opportunity	Low	Grant/funding application
	66	Develop outdoor theatre experience to support storytelling and history displays	New	Concentrated	Identified opportunity	Low	Grant/funding application
	67	Enhance the Buntine road connection between WA and NT	Existing	Concentrated	Identified opportunity	Medium - high	Business case development
	68	Expand the annual Freedom Day festival	Existing	Concentrated	Identified opportunity	Low	Grant/funding application
Keep River National Park	69	Enhanced access to rock art sites	Existing	Broad	Planned	Low – Medium	Market analysis
	70	Enhance access to Keep River NP natural attractions (e.g. Bungle Bungle like formation)	New	Concentrated	Identified opportunity	Low-Medium	Market assessment
	71	Develop a multi-day hike in Keep River National Park	New	Concentrated	Identified opportunity	Medium - High	Market analysis
Timber Creek	72	Develop café and/or accommodation at Policeman's Point	New	Concentrated	Identified opportunity	High	Market analysis
	73	Enhance the Timber Creek old police museum	Existing	Concentrated	Identified opportunity	Low	Grant/funding application
	74	Establish a fishing tour operation	New	Concentrated	Identified opportunity	Medium - high	Market analysis
	75	Develop heritage trails and monuments	Existing	Concentrated	Identified opportunity	Low	Grant/funding application
	77	Development of river access (trail, platforms)	New	Concentrated	Identified opportunity	Low	Grant/funding application
	82	Implement Timber Creek streetscaping masterplan	New	Broad	Identified opportunity	High	Business case
	78	Establish horse riding tours and outback history experience in Timber Creek area	New	Concentrated	Identified opportunity	Low - Medium	Market analysis
	79	Develop Aboriginal arts and cultural products	New	Concentrated	Identified opportunity	Low	Grant/funding application
	80	Establish a river tour operation	New	Concentrated	Identified opportunity	Medium - high	Market analysis
	81	Establish bird watching tours and infrastructure	New	Concentrated	Identified opportunity	Low	Grant/funding application
	82	Develop road infrastructure to enable large vehicle parking	New	Concentrated	Designs established	Medium - High	DIPL budget prioritisation
	83	Establish caravan/RV waste dump point	New	Concentrated	Identified opportunity	Low	Prioritisation in NT waste management strategy
	84	Develop hikes in and around Timber Creek	New	Concentrated	Identified opportunity	Medium	Business Case
	85	Development of Visitor Information Centre	New	Broad	Planned	Medium – High	Business case
Yarralin	86	Develop camp-grounds for visitors	New	Concentrated	Identified opportunity	Low	Market assessment
	87	Upgrade Buchannan Hwy	Existing	Concentrated	Identified opportunity	High	DIPL budget prioritisation
Victoria River Roadhouse	88	Re-establish helicopter tours at Victoria River Roadhouse	Existing	Concentrated	Identified opportunity	Low	Market assessment
	89	Establish a river cruise from Victoria River Roadhouse	New	Concentrated	Identified opportunity	Medium – high	Business case

Appendix B - Socio-economic profile

Tourism industry

Of those employed in the tourism industry, the most common industries were:

- Cafes, restaurants, and takeaway food services (30.3%)
- Accommodation (20.3%)
- Retail trade (12.1%)
- Air, water and other transport (11.0%).

Other tourism industries employing people in the Region were: clubs, pubs, taverns and bars; rail transport; road transport and transport equipment rental; travel agency and tour operator services; cultural services; casinos and other gambling services; other sports and recreation services; and education and training.³⁵

The following information about the Region does not include the West Daly Regional Council LGA and therefore might differ from information in previous chapters.

Population profile

The Region's 2018 estimated resident population (ERP) was 21,156. Between 2011 and 2016, the Region's population increased by 161 people, or 0.8%. This was an annual population change of 0.15% throughout the period. The Region has a young population, with median ages of 27, 26, and 32 in Victoria Daly, Roper Gulf, and Katherine, respectively. This is similar to the NT median age of 32 and considerably younger than the Australian median age of 38.³⁶ Over half (58%) of the population is under the age of 35.³⁷ The Region's population is largely Aboriginal (36.4%), Australian (25.5%), and English (16.6%).

Education

Overall, educational attainment in the Region is lower than in the Territory. Of people aged 15 and over, 27.5% have finished year 12 or higher, compared to 42.9% in the NT. In the Region, 9.6% hold a bachelor's degree or higher, 5.7% hold a diploma or advanced diploma, and 16.8% hold a vocational qualification, compared to 17.1%, 7.2%, and 19.8% in the Territory, respectively.³⁸

Labour force

Despite the increase in population from 2011 to 2016, the size of the labour force decreased to 6,892 from 7,824. In the Region, 8.9% of the labour force reported being unemployed, compared to 7.0% for the Northern Territory and 6.9% for Australia as a whole.³⁹

Income

Weekly household income in the Region is lower than the NT, with a higher proportion of lower incomes and a lower proportion of higher incomes, shown in the chart below. In 2016, 16.9% of households in the Region earned \$2,500 or more weekly, compared to 46% of households in the Territory.

³⁵ <https://profile.id.com.au/rda-northern-territory/about?WebID=170>, <https://profile.id.com.au/rda-northern-territory/about?WebID=230>, <https://profile.id.com.au/rda-northern-territory/about?WebID=210>

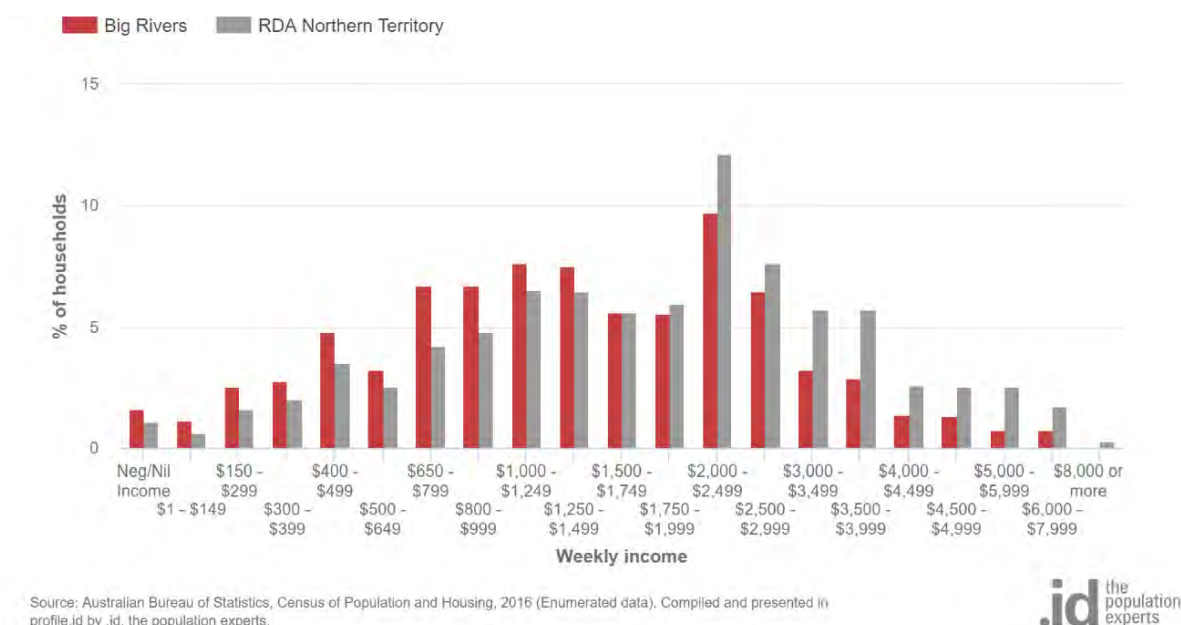
³⁶ Australian Bureau of Statistics, *2016 Census Quickstats: Victoria Daly (R)*.

³⁷ Profile.id, Big Rivers Region: *Population*.

³⁸ Profile.id, Big Rivers Region: *Qualifications*.

³⁹ Profile.id, Big Rivers Region: *Employment Status*.

Figure 8 - Weekly household income, 2016



Source: Profile.id, *Big Rivers Region: Income*

Economic profile

The Region had a GRP of \$1.84 billion in the year ending June 2019, a 1.95% increase from the previous year. Public administration and safety is the largest employment industry, providing 1,480 jobs in 2018/19, which accounted for 17.7% of employment. Interestingly, this is a decrease from 2,231 jobs in 2013/14. Health care and social assistance is the second largest employment industry, accounting for 13.2% of employment in the Region, followed by construction which accounts for 10.8% of employment. These three industries account for 41.7% of employment in the Region. Education and training; mining; and agriculture, forestry and fishing are also large employment industries, each accounting for over 7% of the workforce. Emerging industries from 2013/14 to 2018/19 include construction, which added 515 local workers in the time period, and mining which added 94 workers.⁴⁰

Mining in the Region generated \$586.7 million in 2018/19, up from \$383.1 million in 2013/14. This accounted for 35.9% of the total value added. Construction accounted for an additional 17.8% (\$291.3 million), while the top employment industry of public administration and safety added \$190.6 million (11.7% of value added). Agriculture, forestry and fishing added \$150.5 million, and these four industries accounted for 74.6% of all value added.⁴¹

In 2018, there were 925 businesses registered in the Big Rivers Region, 21.3% of which were in agriculture, forestry and fishing. Other industries included:

- Construction (17.6%)
- Rental, hiring and real estate services (10.6%)
- Other services (7.7%).
- West Daly Regional Council Local Government Area (West Daly LGA)

The West Daly LGA is considered separately to the Big Rivers Region in the economy id data analysis, however for the purposes of Tourism NT, West Daly is part of the Big Rivers Region. Accordingly, the following key considerations of the economic and social profile of the LGA are noted here.

The West Daly LGA's 2018 ERP was 3,693. Between 2011 and 2016, the population grew 5.9%, a substantially higher rate than the Region as a whole.⁴² With a median age of 24, West Daly has the youngest population of all the LGAs in the Region.⁴³

Education attainment is lower in West Daly LGA compared to the Region, with just 4.6% of the population over age 15 holding a bachelor degree or higher, 1.1% holding an advanced diploma, and 8.6% holding a vocational qualification.⁴⁴

The West Daly labour force reported a very substantial unemployment rate of 42.5% in 2016.⁴⁵ Additionally, the median weekly household income is \$1,043 which is much lower than the NT median of \$1,983 and Australia's of \$1,438.43.⁴³

The education and training sector is the largest employer in West Daly, accounting for 18.9% of employment. This is followed by 'other services' (17.0%) and public administration and safety (14.9%).⁴⁶

West Daly's GRP was \$0.07 billion in the year ending June 2019, a decrease of 7.2% from the previous year. Mining was the most productive industry, generating \$10.1 million in 2018/19.⁴⁷

In 2018/19, tourism in West Daly added \$1.2 million in value, and 16 people were employed directly and indirectly in tourism and hospitality.⁴⁸

⁴⁰ Profile.id, *Big Rivers Region: Employment by Industry*

⁴¹ Profile.id, *Big Rivers Region: Value added*.

⁴² Profile.id, *West Daly Regional Council LGA: Population and dwellings*.

⁴³ Australian Bureau of Statistics, 2016 QuickStats: *West Daly (R)*.

⁴⁴ Profile.id, *West Daly Regional Council LGA: Qualifications*.

⁴⁵ Profile.id, *West Daly Regional Council LGA: Employment status*.

⁴⁶ Economy.id, *West Daly Regional Council LGA: Employment by industry*.

⁴⁷ Economy.id, *West Daly Regional Council LGA: Value added*.

⁴⁸ Economy.id, *West Daly Regional Council LGA: Tourism and hospitality value*.

Appendix C - Key location descriptions

Daly River

Daly River is the name of both a town and a river in the NT. Located 260 km north-west of Katherine, Daly River is approximately a 3.5-hour drive from both Katherine and Darwin. Daly River is home to only 127 people. The top employment industry is accommodation, followed by local government administration.⁴⁹

Daly River is known for fishing, with the Barra Classic and Barra Nationals annual fishing competitions both taking place there.⁵⁰ The Daly River Barra Resort offers full and half-day fishing charters, as well as accommodation in the form of self-contained units, caravan parking, and camping facilities. The Daly River Mango Farm also offers accommodation, as well as a bushwalk around the property which includes Jesuit Ruins dating back to the 1880s.⁵¹ There are several more caravan parks located in the region, mostly focused on serving the recreational fishing industry. Daly River is a perfect spot for nature lovers, offering bushwalking, billabongs, and wildlife and bird watching, though has very limited established product or infrastructure to support this.

Douglas-Daly

Douglas-Daly is located roughly halfway between Darwin and Katherine. Just 195 km north-west of Katherine and 200 km south of Darwin, it is easily accessible by turning off Stuart Highway. It can also be accessed by 4WD through Litchfield National Park in the dry season.⁵² The top employment industries are gold ore mining, forestry, and beef cattle farming. With a population of only 238⁵³, Douglas-Daly is a small locality considered to be a relaxing and peaceful spot to go to watch wildlife and enjoy nature.

Douglas-Daly is home to beautiful natural scenery such as Butterfly Gorge, Arches Waterhole, Ooloo Crossing, Douglas Hot Springs, and abundant wildlife. The region is known for fishing, but is also home to bandicoots, wallabies, over 100 different types of birds, and saltwater crocodiles. Nearby the Daly River Crossing is the Merrepen Arts Centre, which displays and sells Aboriginal arts and crafts made by the local Nauiyu community. Douglas-Daly is also home to twelve NT Heritage registered places, including the WWII Fenton Airfield, 12 Mile Chinatown Settlement and Battery, and Burrundie Explosives Magazines.⁵⁴ Douglas Daly Tourist Park offers accommodation in the form of cabins, caravan parking, and camping facilities. Here, tourists can enjoy a swimming pool, spa, BBQ area, laundry, a café, bar, and convenience store.⁵⁵ Other camping spots are available at the hot springs and the Douglas River and Daly River Conservation areas campsites.

Pine Creek

Pine Creek is located 90 km north of Katherine at the junction of the Kakadu and Stuart Highways. The Overland Telegraph Line passed through Pine Creek, and in 1871, posthole diggers discovered gold here. By 1885, 4,000 Chinese workers and 200 Europeans were living and working in the town.⁵⁶ Now, Pine Creek is a small community of 328, who mostly work in accommodation, beef cattle farming, and local government administration.⁵⁷

Pine Creek offers food, fuel, accommodation, and a collection of historic buildings and sites. Attractions are mainly related to the town's history, and include the annual Gold Rush Festival each June. Pine Creek has a mine lookout with a panoramic view of an open cut mine, Miners Park with historic mining machinery, and the railway station and old Station Master's residence. The railway station operated until 1976, and during WWII supported up to 147 services per week.⁵⁹ The railway station is just one of several museums located in Pine Creek.

Tjuwaliyn (Douglas) Hot Springs Park

Just 18 km from Douglas-Daly, the Hot Springs Park is a natural park full of thermal hot springs. The park is on the traditional lands of the Wagiman people and has some sacred sites. The park is managed jointly by the Wagiman people and Parks and Wildlife NT. Visitors may swim, walk and camp.⁶⁰

Douglas River and Daly River Conservation Areas

The Douglas River and Daly River Conservation area provides a tranquil area where visitors can camp, walk and picnic. Visitors may see wildlife such as agile wallabies and other native animals.⁶¹

Butterfly Gorge Nature Park

Located 30 km east of Douglas-Daly, Butterfly Gorge Nature Park protects part of the Douglas River. The park is home to large numbers of common crow butterflies and offers visitors a tranquil natural landscape. Visitors may take scenic walks or go swimming in the park's natural pools. While visitors cannot camp in the park, they may camp in the nearby Tjuwaliyn (Douglas) Hot Springs Park.⁶²

⁴⁹ Australian Bureau of Statistics, *2016 Census QuickStats: Daly River*. https://quickstats.censusdata.abs.gov.au/census_services/getproduct/census/2016/quickstat/SSC70071, (accessed 30 January 2020).

⁵⁰ Aussie Towns: *Daly River, NT*. <http://www.aussietowns.com.au/town/daly-river-nt>, (accessed 30 January 2020).

⁵¹ Daly River Mango Farm. <https://www.mangofarm.com.au/park-info>, (accessed 30 January 2020).

⁵² Katherine Visitor Centre, *Douglas and Daly River*. <https://www.visitkatherine.com.au/surrounding-regions/douglas-daly>, (accessed 30 January 2020).

⁵³ Australian Bureau of Statistics, *2016 Census QuickStats: Douglas-Daly*. https://quickstats.censusdata.abs.gov.au/census_services/getproduct/census/2016/quickstat/SSC70079, (accessed 30 January 2020).

⁵⁴ Northern Territory Government, *Heritage Register*. <http://www.ntlis.nt.gov.au/heritageregister/>/?p=103:301::NO::P301_SPATIAL:N, (accessed 30 January 2020).

⁵⁵ Douglas Daly Park. <https://www.douglasdalypark.com.au/facilities>, (accessed 30 January 2020).

⁵⁶ Katherine Visitor Centre, *Pine Creek Northern Goldfields Loop and Southern Kakadu*. <https://www.visitkatherine.com.au/surrounding-regions/pine-creek-hayes-creek>, (accessed 30 January 2020).

⁵⁷ Australian Bureau of Statistics, *2016 Census QuickStats: Pine Creek (NT)*. https://quickstats.censusdata.abs.gov.au/census_services/getproduct/census/2016/quickstat/SSC70224, (accessed 30 January 2020).

⁵⁸ Katherine Visitor Centre, *Pine Creek Northern Goldfields Loop and Southern Kakadu*. <https://www.visitkatherine.com.au/surrounding-regions/pine-creek-hayes-creek>, (accessed 30 January 2020).

⁵⁹ National Trust NT, *Railway Station Pine Creek*. <https://www.nationaltrust.org.au/places/railway-station-pine-creek/>, (accessed 30 January 2020).

⁶⁰ Northern Territory Government, *Tjuwaliyn (Douglas) Hot Springs Park*. <https://nt.gov.au/leisure/parks-reserves/find-a-park/find-a-park-to-visit/tjuwaliyn-douglas-hot-springs-park>, (accessed 6 April 2020).

⁶¹ Northern Territory Government, *Douglas River and Daly River Conservation Areas*. <https://nt.gov.au/leisure/parks-reserves/find-a-park/find-a-park-to-visit/douglas-daly-river-conservation-areas>, (accessed 6 April 2020).

⁶² Northern Territory Government, *Butterfly Gorge Nature Park Face Sheet*. https://nt.gov.au/_data/assets/pdf_file/0010/200062/butterfly-gorge-nature-park-face-sheet.pdf, (accessed 6 April 2020).

Umbrawarra Gorge Nature Park

Located 26 km south-west of Pine Creek, Umbrawarra Gorge Nature Park is a stunning gorge with sharp cliffs and sandstone overhangs. In the early dry season, visitors may swim at the park's sandy beaches and rocky pools.⁶³

Katherine

Katherine is the fourth largest town in the Northern Territory, after Darwin, Palmerston, and Alice Springs. Home to 10,623 people, Katherine is located approximately 300 km south of Darwin, or a 3.5 hour drive. From Darwin, drivers must pass through Katherine on the way to either Western Australia or Queensland. The most common employment industry is Defence as the Tindal RAAF base is located just outside of Katherine. Other top employment industries include social assistance services, the hospital, primary education, and state government administration.^{64,65}

Katherine is home to a range of attractions, including natural, arts & culture, and history & museums. One of Katherine's most famous attractions is Nitmiluk National Park, home to the Nitmiluk Gorge. Visitors can explore Nitmiluk National Park and the Gorge by motorised boat, canoe, walking tracks, or scenic helicopter ride. Located 66 km from Nitmiluk Gorge and still within Nitmiluk National Park is Leliyn (Edith Falls), a spring-fed waterfall that flows year-round and offers swimming, bush walks, camping, and picnic areas. Other attractions include the Top Didj Cultural Experience where visitors can learn about Aboriginal culture and explore art galleries; the Katherine Outback Experience where visitors can experience life on a cattle station; and Marksie's Stockman's Camp Tucker Night where visitors learn about traditional campfire cooking and experience a bush tucker meal. Katherine is also home to hot springs, cafes, bars, and several accommodation options.⁶⁶

Nitmiluk National Park

Nitmiluk National Park is located just 28 km north-east of Katherine and can be reached by car in under 30 minutes. The Park covers an area of 2,920 km² and is owned by the Jawoyn people, jointly managed with Parks and Wildlife NT.⁶⁷ Nitmiluk National Park offers hiking, canoeing, camping, swimming, and Jawoyn art sighting. Leliyn (Edith Falls) offers swimming and a fully serviced campground. The 58 km Jatbula Trail offers a five-day difficult trail for experienced hikers, starting at the Visitor Information Centre and ending at Leliyn (Edith Falls).⁶⁸ The most famous landmark in the Park, however, is the Nitmiluk Gorge, a series of 13 gorges. The fourth, fifth, and ninth gorges are accessible by canoe and provide overnight camping areas.⁶⁹ Nitmiluk Gorge is also viewable by boat tour or scenic flight.

Cutta Cutta Caves Nature Park

Located along the Stuart Highway 30 km south-east of Katherine, the Cutta Cutta Caves are moulded limestone formations of stalactites and stalagmites which are home to five different bat species. Here, visitors may take guided tours and the 10-20 minute Tropical Savannah Walk.⁷⁰

Elsey National Park

Elsey National Park is located 120 km south-east of Katherine. It can be reached from Katherine in about an hour and a half. The park was made famous by an Australian novel, *We of the Never Never*, an autobiographical book about author Jeannie Gunn's time at Elsey Cattle Station in the early 1900s.⁷¹ The movie adaptation was filmed in Mataranka, the nearby town, where an authentic replica, the Homestead, was constructed for the film. The Homestead is now a tourist attraction, however the most well-known spots in Elsey National Park are Bitter Springs and Mataranka Thermal Pool, both popular swimming spots. Other attractions within the park include camping, boating, fishing, walking, and WWII history walks.⁷³

Barunga

Barunga is located roughly 83 km east of Katherine. It is accessible via an all-weather road and takes approximately one hour to drive from Katherine. Barunga is a small town of 363 people, 318 of which are Aboriginal. Kriol is the most common language spoken. The most common employment industries are combined primary and secondary education and local government administration.⁷⁴

Barunga is most well-known for the annual Barunga Festival which has been running since 1985.⁷⁵ The festival attracts 4,000 visitors each year from all over the world. The Barunga Festival takes place over three days in June and celebrates remote Aboriginal culture, including music, sport, traditional arts and other cultural activities. The only accommodation option available in Barunga is camping, but Katherine and Mataranka (each 83 km away) and Beswick (30 km away) offer accommodation options, including hotel, motel, caravan parking, and camping facilities.

⁶³ Northern Territory Government, *Umbrawarra Gorge Nature Park*. <https://nt.gov.au/leisure/parks-reserves/find-a-park/find-a-park-to-visit/umbrawarra-gorge-nature-park>, (accessed 6 April 2020).

⁶⁴ Profile.id, *Katherine Town Council LGA*.

⁶⁵ Australian Bureau of Statistics, *2016 Census QuickStats: Katherine*. https://quickstats.censusdata.abs.gov.au/census_services/getproduct/census/2016/quickstat/UCL714001, (accessed 30 January 2020).

⁶⁶ Katherine Visitor Centre, *About Katherine*. <https://www.visitkatherine.com.au/about-katherine>, (accessed 30 January 2020).

⁶⁷ Nitmiluk Tours, *Nitmiluk National Park*. <https://www.nitmiluktours.com.au/about/nitmiluk-national-park>, (accessed 4 February 2020).

⁶⁸ Tourism NT, *Nitmiluk Gorge*. <https://northernterritory.com/katherine-and-surrounds/destinations/nitmiluk-national-park>, (accessed 4 February 2020).

⁶⁹ Northern Territory Government, *Nitmiluk National Park*. <https://nt.gov.au/leisure/parks-reserves/find-a-park/find-a-park-to-visit/nitmiluk-national-park>, (accessed 4 February 2020).

⁷⁰ Northern Territory Government, *Cutta Cutta Caves Nature Park*. <https://nt.gov.au/leisure/parks-reserves/find-a-park/find-a-park-to-visit/cutta-cutta-caves-nature-park>, (accessed 6 April 2020).

⁷¹ Tourism NT, *Elsey National Park*. <https://northernterritory.com/katherine-and-surrounds/destinations/elsey-national-park>, (accessed 31 January 2020).

⁷² Tourism NT, *Elsey Homestead Replica*. <https://northernterritory.com/katherine-and-surrounds/see-and-do/elsey-homestead-replica>, (accessed 31 January 2020).

⁷³ Northern Territory Government, *Elsey National Park Fact Sheet*

⁷⁴ Australian Bureau of Statistics, *2016 Census QuickStats: Barunga*. https://quickstats.censusdata.abs.gov.au/census_services/getproduct/census/2016/quickstat/SSC70023, (accessed 30 January 2020).

⁷⁵ Barunga Festival, *Frequently Asked Questions*. https://quickstats.censusdata.abs.gov.au/census_services/getproduct/census/2016/quickstat/SSC70031, (accessed 30 January 2020).

Beswick

Located 110 km east of Katherine, Beswick is located on the Waterhouse River and takes just over an hour to get to from Katherine. Beswick is an Aboriginal community of 531 people, and is also known as Wugularr. Kriol is the most common language spoken. The most common industry of employment is local government administration, with 34% of the working population employed in this industry.⁷⁶

Beswick is home to the Ghunmarn Culture Centre and Djilpin Art Centre which contains a range of authentic, original art and artefacts.⁷⁷ The centre has didgeridoos, carvings, fibre art, paintings on canvas and bark, limited edition and fine prints. It also houses the Blanas Collection, an exhibit of culturally significant art. Djilpin Arts was founded in 2002 to maintain, develop and promote local traditional and contemporary Aboriginal visual and performing arts.⁷⁸ Visitors may stay in Beswick at the Djakanimba Pavilions which offer queen beds and amenities. Visitors may also experience a cultural tour or learn how to create fibre artwork.

Larrimah

Larrimah is a very small town located 185 km south-east of Katherine along the Stuart Highway. With a population of only 47⁷⁹, Larrimah is best known for the Larrimah Pink Panther Hotel. The hotel moved to Larrimah in 1952 when Larrimah was the starting point for moving troops and supplies to Darwin. Today, the hotel offers powered and unpowered camping sites, motel rooms, a swimming pool, pub, restaurant, and a small zoo. Next door, the Larrimah Museum displays war history and photographs⁸⁰ of the area when it had been a staging camp for over 6,000 personnel. Ten km north is the Gorrie Airfield, a dirt airfield used during World War II.⁸²

Daly Waters

Daly Waters is a locality that is fully surrounded by the town of Birdum, which has a population of 86.⁸³ Daly Waters is located 275 km south-east of Katherine along the Stuart Highway, and takes about three hours drive from Katherine. Daly Waters is recognised by the Daly Waters Pub, originally built in 1930,⁸⁴ which has had a continuous liquor license since 1938.⁸⁵ Daly Waters Pub is perhaps best known for the collection of personal items that have been purposely left behind, creating a collection that has been growing since the 1980s. The Daly Waters Pub offers food, drinks, and accommodation. Nearby, the Daly Waters Airstrip and Hangar still stand where they were used during World War II.⁸⁶

Borrooloola

Borrooloola is a remote community of 871 people, located in the eastern part of the Northern Territory, 250 km from the Queensland-Northern Territory border. Borrooloola is roughly a seven hour drive from Katherine along the Carpentaria Highway, located 650 km to the south-east on the McArthur River. Borrooloola is also accessible by air, with an airstrip in town and the McArthur River Mine Airport 64 km to the south. Roughly half the population in Borrooloola is Aboriginal, and English, Garrwa and Yanyuwa are the most common languages spoken. Primary education, accommodation, allied health services, and silver-lead-zinc ore mining are the top employment industries in Borrooloola.⁸⁷

Fishing is the biggest drawcard to Borrooloola, and the number of visitors who use Borrooloola as a base for fishing expeditions further into the region has been growing. The region is home to a number of natural sites, including Barranyi (North Island) National Park, Cape Crawford, Carabirini Conservation Reserve, Limmen National Park, and the Abner Ranges.⁸⁸ Other attractions include the Borrooloola Museum which is housed in the Old Police Station and has an exhibition on police presence in the 1800s, and the Waralungky Arts Centre which displays and sells Aboriginal artwork made by local Aboriginal people.⁸⁹

King Ash Bay

King Ash Bay is located 42 km, or a 35 minute drive, north-east of Borrooloola. King Ash Bay is best known as a fishing destination, and the winter months see hundreds of anglers making their way there. King Ash Bay provides easy access to the waters of the Gulf of Carpentaria, Edward Pellew Islands, and the McArthur River. The King Ash Bay Fishing Club offers camping and caravan facilities, a bar, grill, and a golf course. Other accommodation options include house boats, a wilderness lodge, plus a lodge with air-conditioned rooms with BBQs, a pool, and a pool table.⁹⁰

Barranyi (North Island) National Park

Located north-east of Borrooloola, Barranyi (North Island) National Park is the perfect spot for fishing. It is part of the Sir Edward Pellew group of islands, and is home to Bluefin tuna, Spanish mackerel, Queenfish and trevally. The island's sandstone cliffs, sandy beaches and small coves make it a picturesque spot to go fishing and bird watching. The park is accessible by vessel only, and visitors may camp here.⁹¹

⁷⁶ Australian Bureau of Statistics, *2016 Census QuickStats: Beswick*. https://quickstats.censusdata.abs.gov.au/census_services/getproduct/census/2016/quickstat/SSC70031, (accessed 30 January 2020).

⁷⁷ Katherine Visitor Centre, *Beswick*. <https://www.visitkatherine.com.au/surrounding-regions/beswick>, (accessed 30 January 2020).

⁷⁸ Djilpin Arts. <https://www.djilpinarts.org.au/accommodation-cultural-experiences/>, (accessed 30 January 2020).

⁷⁹ Australian Bureau of Statistics, *2016 Census QuickStats: Larrimah*. https://quickstats.censusdata.abs.gov.au/census_services/getproduct/census/2016/quickstat/SSC70160, (accessed 31 January 2020).

⁸⁰ Tourism NT, *Larrimah Museum*. <https://northernterritory.com/katherine-and-surrounds/see-and-do/larrimah-museum>, (accessed 30 January 2020).

⁸¹ Larrimah Pink Panther Hotel, *Museum*. <https://larrimahwaysideinn.wordpress.com/museum/>, (accessed 31 January 2020).

⁸² Aussie Towns, *Larrimah, NT*. https://quickstats.censusdata.abs.gov.au/census_services/getproduct/census/2016/quickstat/SSC70034, (accessed 31 January 2020).

⁸³ Australian Bureau of Statistics, *2016 Census QuickStats: Daly Waters, NT*. https://quickstats.censusdata.abs.gov.au/census_services/getproduct/census/2016/quickstat/SSC70034, (accessed 31 January 2020).

⁸⁴ Daly Waters Pub, *Our Story*. <https://www.dalywaterspub.com/our-story>, (accessed 31 January 2020).

⁸⁵ Tourism NT, *Daly Waters Historic Pub*. <https://northernterritory.com/katherine-and-surrounds/food-and-drink/daly-waters-historic-pub>, (accessed 31 January 2020).

⁸⁶ Aussie Towns, *Daly Waters, NT*. <http://www.aussietowns.com.au/town/daly-waters-nt>, (accessed 31 January 2020).

⁸⁷ Australian Bureau of Statistics, *2016 Census QuickStats: Borrooloola*. https://quickstats.censusdata.abs.gov.au/census_services/getproduct/census/2016/quickstat/SSC70037, (accessed 31 January 2020).

⁸⁸ Aussie Towns, *Borrooloola, NT*. <http://www.aussietowns.com.au/town/borrooloola-nt>, (accessed 31 January 2020).

⁸⁹ Katherine Visitor Centre, *Borrooloola*. <https://www.visitkatherine.com.au/surrounding-regions/borrooloola>, (accessed 31 January 2020).

⁹⁰ King Ash Bay Fishing Club, *Club Facilities*. <http://www.kingashbay.com.au/category/other-facilities-2/>, (accessed 31 January 2020).

⁹¹ Northern Territory Government, *Barranyi (North Island) National Park*. <https://nt.gov.au/leisure/parks-reserves/find-a-park/find-a-park-to-visit/barranyi-national-park>, (accessed 6 April 2020).

Caranbirini Conservation Reserve

Located 44 km south-west of Borroloola, the Caranbirini Conservation Reserve offers stunning scenery with weathered sandstone pillars standing up to 25 metres high. Three walks allow visitors to explore the park, and bird watchers may spot kingfishers, herons and brolgas. The area is home to the Gadanji people, and tells the dreaming story of the Barrawulla, the white cockatoo and Jagududgu the emu.⁹²

Limmen National Park

The Limmen National Park is located south of Ngukurr in the Gulf region of the Territory. The park offers visitors a remote experience in an amazing landscape, and can be explored by 4WD. Visitors may go bird watching, fishing and walking. Butterfly Falls within the Park also offers swimming during certain times of the year.⁹³

Limmen Bight Marine Park

The Limmen Bight Marine Park is located at the edge of Limmen National Park and within the Gulf of Carpentaria. It has the NT's largest population of dugongs and three different species of rare pipefish. Here, anglers target mud crabs, barramundi and prawns.⁹⁴

Ngukurr

Ngukurr is a remote Aboriginal community 320 km east of Katherine, on the Roper River. Ngukurr is accessible by air and car, though flooding can cause difficult access during the wet season. Roughly 83% of Ngukurr's 1,149 people are Aboriginal, and Kriol is the most common language spoken. Local government administration and combined primary and secondary education are the two most common industries of employment.⁹⁵

Visitors to Ngukurr can visit the Ngukurr Arts Centre where they can view local Aboriginal art, meet local artists, and purchase art. The Roper River offers fishing spots, and a nearby billabong offers spectacular views of local wildlife. The Darlala Motel offers accommodation in the form of queen and twin beds.⁹⁶

Timber Creek

Timber Creek is a small town located closer to Western Australia than to Katherine. 183 km from the WA border, Timber Creek is about 290 km south-west of Katherine and takes about three hours to get to. Timber Creek has a small population of 249. English is the most common language spoken, and Kriol and Ngaliwurru are also commonly spoken. Local government administration and primary education are the top employment industries in Timber Creek.⁹⁷

Fishing is one of the big drawcards for Timber Creek, which is known as one of the best spots to fish for barramundi in the Northern Territory. Big Horse Creek, 10 km west of Timber Creek, is renowned as a barramundi fishing spot. Aside from fishing, Timber Creek also offers other natural wonders, including the Judbarra/Gregory National Park which extends south from Timber Creek.⁹⁸ Timber Creek's Heritage Trail runs from the Roadhouse to the Old Police Station, which operates as a museum. Accommodation options range from camping and caravan parking to budget and ensuite rooms.⁹⁹ The Timber Creek Hotel and Wirib Caravan Park offer a range of amenities including BBQ areas, a swimming pool, and laundry.

Judbarra/Gregory National Park

The Judbarra/Gregory National Park sits in north-western NT, 230 km south-west of Katherine. It can be accessed from Victoria Highway near Timber Creek and by 4WD tracks from Kalkaringi. The park extends south from Timber Creek to Kalkaringi, covering an area of 13,000 km².¹⁰⁰ The park is divided into the Eastern Section and the Western Section. The Eastern Section offers walks, picnic areas, and camping areas, however is only accessible during the dry season. The Western Section offers fishing, four-wheel driving, walks and historic features.¹⁰¹ Within the park is Gregory's Tree, a boab tree and sacred site to the Ngarinyman people.

⁹² Northern Territory Government, *Caranbirini Conservation Reserve*. <https://nt.gov.au/leisure/parks-reserves/find-a-park/find-a-park-to-visit/caranbirini-conservation-reserve>, (accessed 6 April 2020).

⁹³ Northern Territory Government, *Limmen National Park*. <https://nt.gov.au/leisure/parks-reserves/find-a-park/find-a-park-to-visit/limmen-national-park>, (accessed 6 April 2020).

⁹⁴ Northern Territory Government, *Limmen Bight Marine Park*. <https://nt.gov.au/leisure/parks-reserves/find-a-park/find-a-park-to-visit/limmen-bight-marine-park>, (accessed 6 April 2020).

⁹⁵ Australian Bureau of Statistics, *2016 Census QuickStats: Ngukurr*. https://quickstats.censusdata.abs.gov.au/census_services/getproduct/census/2016/quickstat/SSC70207, (accessed 31 January 2020).

⁹⁶ The Darlala Motel, *The Darlala Motel Accommodation*. <https://northernterritory.com/katherine-and-surrounds/see-and-do/gregorys-tree>, (accessed 31 January 2020).

⁹⁷ Australian Bureau of Statistics, *2016 Census QuickStats: Timber Creek*. https://quickstats.censusdata.abs.gov.au/census_services/getproduct/census/2016/quickstat/SSC70257, (accessed 30 January 2020).

⁹⁸ Aussie Towns, *Timber Creek, NT*. <http://www.aussietowns.com.au/town/timber-creek-nt>, (accessed 31 January 2020).

⁹⁹ Timber Creek Hotel, *Accommodation/Camping*. <http://timbercreekhotel.com.au/accommodation/>, (accessed 31 January 2020).

¹⁰⁰ Tourism NT, *Gregory's Tree*. <https://northernterritory.com/katherine-and-surrounds/see-and-do/gregorys-tree>, (accessed 31 January 2020).

¹⁰¹ Northern Territory Government, *Judbarra/Gregory National Park Fact Sheet*

Giwining/Flora River Nature Park

The Flora River Nature Park can be reached in approximately two hours from Katherine, located 145 km south-west. The Flora River's tufa dams create picturesque waterfalls into crystal-clear springs. Kathleen Falls and Djarrung Falls are two of the more popular waterfalls. Though swimming is not allowed here, a small boat ramp can accommodate small boats to access 5 km of the river.¹⁰² The park protects 25 km of the Flora River, which is home to barramundi, bream, catfish, grunters, plus saltwater and freshwater crocodiles.¹⁰³ The park also offers camping spots and plenty of space to relax and enjoy nature.

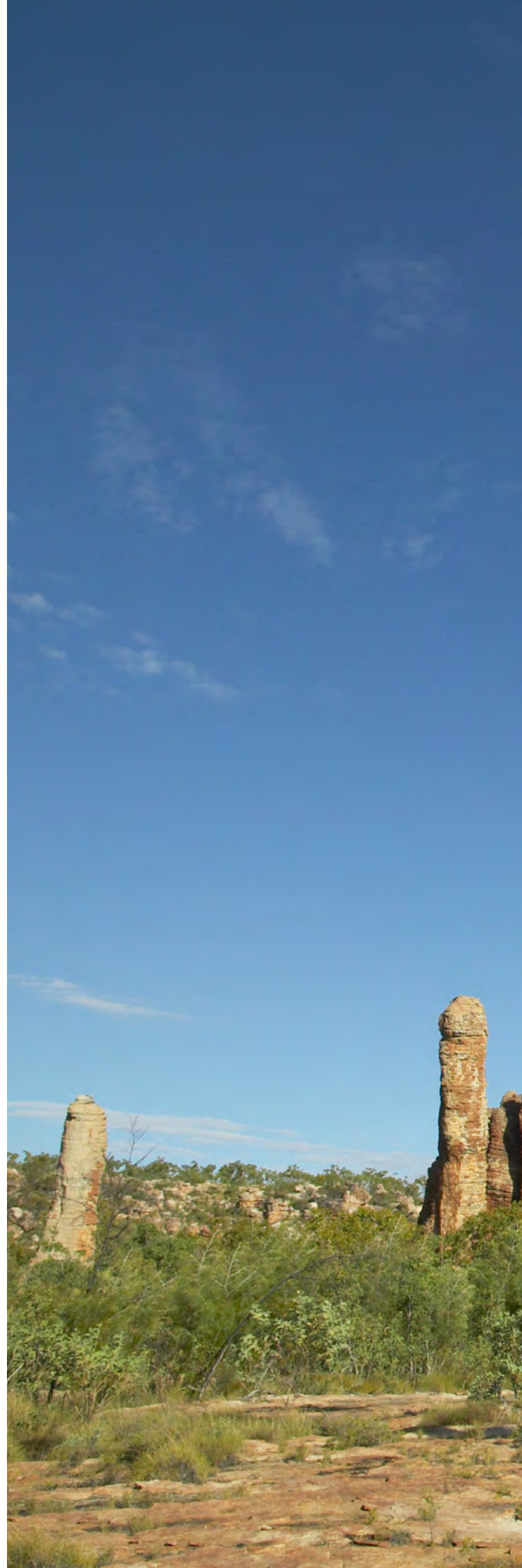
Kalkaringi

Kalkaringi is a community approximately 460 km south-west of Katherine, on the Buntine Highway and adjacent to the Victoria River. Kalkaringi hosts the Karungkarni art and culture centre operated by Gurindji artists. Karungkarni is the name of a sacred site, a dreaming hill south of Kalkaringi. In addition to Aboriginal traditions and culture, Kalkaringi has an important modern history as the site of the Wave Hill Walk Off in 1966, following protest and lobbying led by Vincent Lingiari. This resulted in the return of a portion of homelands to the Gurindji people in 1974 and the passing of the first legislation that allowed for Indigenous people to claim land title.¹⁰⁴

¹⁰² Northern Territory Government, *Giwining/Flora River Nature Park*. <https://nt.gov.au/leisure/parks-reserves/find-a-park/find-a-park-to-visit/giwining-flora-river-nature-park>, (accessed 31 January 2020).

¹⁰³ Tourism NT, *Giwining/Flora River Nature Park*. <https://northernterritory.com/katherine-and-surrounds/see-and-do/giwining-flora-river-nature-park>, (accessed 31 January 2020).

¹⁰⁴ National Museum Australia, Wave Hill Walk Off, <https://www.nma.gov.au/defining-moments/resources/wave-hill-walk-off> (accessed 9 July 2020)





Appendix D - Tourism development planning in the Big Rivers 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 DMP for the Big Rivers 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, together 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 towards the vision for the Northern Territory to be the undeniable leader in the Aboriginal tourism sector.

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

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*.

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:

- Upgrades to the Judbarra/Gregory National Park including the Matt Wilson campground development, Visitor Interpretation Centre, Gregory Cave/limestone campground, Victoria River visitor hub and Keep River development
- Leliyn (Edith Falls) master plan implementation
- New riverside hotel
- Elsey National Park upgrades
- Nitmiluk National Park visitor experience upgrades
- Katherine Art Gallery extensions, connecting the Arts Trail
- Katherine Railway Bridge Function Centre, including a restaurant and upgrade to park surrounds
- Pine Creek tourism facilities and walking trails
- Revitalisation of Katherine CBD including developing green spaces, Wetlands on the Terrace, and Cenotaph function site
- Limmen National Park Visitor Facility enhancement
- Art site access improvements in Limmen, Judbarra/Gregory and Keep River National Parks
- Nitmiluk National Park new tour boat jetty
- Nitmiluk National Park Essential Services upgrade
- Borroloola combined government and tourist centre
- Katherine rail passenger terminal redevelopment.

These projects are specifically for the benefit of tourism in the Region, with the goals of improving amenity for community and visitors, enhancing the visitor experience, increasing length of stay in the Territory, increasing visitor numbers, and enabling growth in the tourism and corporate markets.

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 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.

Statements of management intent

Statements of management intent by the NT Department of Environment, Parks and Water Security have been considered for:

- Cutta Cutta Caves Nature Park
- Judbarra/Gregory National Park and Gregory's Tree Historical Reserve
- Keep River National Park and Spirit Hills Management Area
- Elsey National Park
- Nitmiluk National Park.

Statements of management intent identify park values, threats and management objectives. Park values typically focus on recreation, natural, culture and conservation opportunities. In close alignment with these values, the management objectives across the plans focus on:

- Protecting, maintaining and improving the health, integrity and condition of the natural environment
- Providing and maintaining recreation experiences
- Conserving significant archaeological sites and maintaining Aboriginal connection to country
- Achieving equitable joint management partnerships
- Protecting and interpreting sites of history.

Management plans

Management plans have been considered for:

- Giwining/Flora River Nature Park
- Judbarra/Gregory National Park and Gregory's Tree Historical Reserve
- Nitmiluk National Park.

The desired outcomes from the Giwining/Flora River Nature Park joint management plan focuses on developing the governance of the Park, including:

- Maintaining the strength of culture
- Benefits for Traditional Owners
- Good working relationships between the partners
- Good park management
- Strong community ownership and participation in decision making.

Priorities of the Judbarra/Gregory National Park and Gregory's Tree Historical Reserve joint management plan focuses on the natural and cultural values of the Park, including to:

- Protect the outstanding natural, Aboriginal and historical resources of the Park
- Provide a range of interactive nature and culture-based experiences for visitors
- Ensure Traditional Owners benefit from joint management arrangements.

Priorities of the Nitmiluk National Park management plan focus on visitor experience and engagement including:

- Providing high-quality, world class experiences where visitors can enjoy and respect the Park's cultural and natural values
- Actively promoting an understanding of and respect for Jawoyn culture, history and role in management of the Park
- Ensuring visitors feel welcome, safe, inspired and highly satisfied
- Regularly engaging with the tourism industry.

The joint management plans demonstrate a spectrum of management planning sophistication, management capacity, park development, and current potential to contribute to tourism outcomes. Nitmiluk National Park represents a high standard in Park joint management between government and traditional landowners, with broad recognition across the industry of the highly successful management of the Park.

Visitor experience development plans

Visitor experience development plans have been developed for Nitmiluk National Park and Elsey National Park. The Visitor Experience Development Plan (VEDP) aims to guide the enhancement of the Park's visitor experience offerings. The development of VDEPs highlight the significance of these National Parks for the Region.

The vision of the Nitmiluk National Park VEDP is to welcome visitors to a place of timeless landscapes and Jawoyn culture, and through self-discovery have visitors leave feeling connected to the place physically and spiritually.

Guiding principles for the plan include:

- Respecting and embracing the cultural essence of the Park
- Providing immersive and exciting experiences
- Environmental conservation as the backbone of the Park
- Aligning with strategic plans
- Targeting the market audience
- Building positive economic and social impacts.

Priority experiences identified for the Park include:

- Nitmiluk Gorge precinct
- Leliyn visitor precinct
- Walking
- Swimming
- Cycling.

The vision for Elsey National Park VEDP is for the Park to rejuvenate visitors physically and emotionally through the healing properties of thermal pools and leave them with an appreciation of the local history and environment.

Guiding principles for the plan include:

- Creating a sense of arrival
- Leveraging healing properties of the springs
- Environmental conservation as the backbone of the Park
- Expressing the narrative
- Aligning with strategic plans
- Targeting the market audience
- Building positive economic and social impacts.

Priority experiences for the Park include:

- Bitter Springs
- Mataranka thermal pools
- Jalmurark (12-mile camp)

Regional council plans

Four Councils have a role in providing services and governance in the Region:

- Katherine Town Council
- Roper Gulf Regional Council
- Victoria Daly Council
- West Daly Regional Council.

Three Councils in the Region have a vision for the development of destinations in their municipality that can be leveraged in tourism planning.

Katherine Town Council

The *Katherine Town Council Municipal Plan 2019-2020* identifies planned tourism infrastructure developments including upgrades to the Katherine:

- Hot Springs
- Showgrounds
- Sportsgrounds.

The Plan also acknowledges funding partnerships with the Godinymayin Yijard Rivers Arts and Cultural Centre and the Katherine Visitor Information Centre.

Victoria Daly Regional Council

The Victoria Daly Regional Plan 2019-2020 identifies several tourism development priorities in the municipality, including:

Pine Creek:

- Upgrades to improve access for caravans and dedicated caravan parking
- Beautification of the main street by clearing deteriorating dongas at the mining camp site
- Seeking funding to enhance the Gold Rush Festival
- Encouraging bird watching, including installation of a bird bath.

Timber Creek:

- Development of a 'visitor tourist experience' including development of the Police House Museum as an attraction plus installation of campfire spots in strategic locations.

Yarralin:

- Develop attractions specific to Yarralin's natural beauty and remote experiences
- Develop camping areas to help promote eco-tourism.

Roper Gulf Regional Council

The Roper Gulf Regional Council Plan 2019-2020 identified the following priorities for tourism development in the municipality:

- Development of the sports precinct masterplan in Ngukurr
- Support tourism opportunities in Barunga, including construction of Gatadanj Lookout
- Advocacy efforts for tourism development in the communities.

Master planning

Master plans have been drafted for the towns of Mataranka, Borroloola and Timber Creek, focusing on:

- Enhanced rubbish disposal around main tourism areas (more bins and daily rubbish pick-ups)
- Well maintained tables and shade structures/trees in central areas of towns to be used by tourists
- Encourage community art and landscaping
- Toilets and water to be provided in a central location that is well maintained.

Community plans

Outside of Regional and Town Councils a number of communities in the Region have governing bodies enabling integration in tourism development activities.

Local Decision-Making Post Agreements and Multi Agency Partnerships

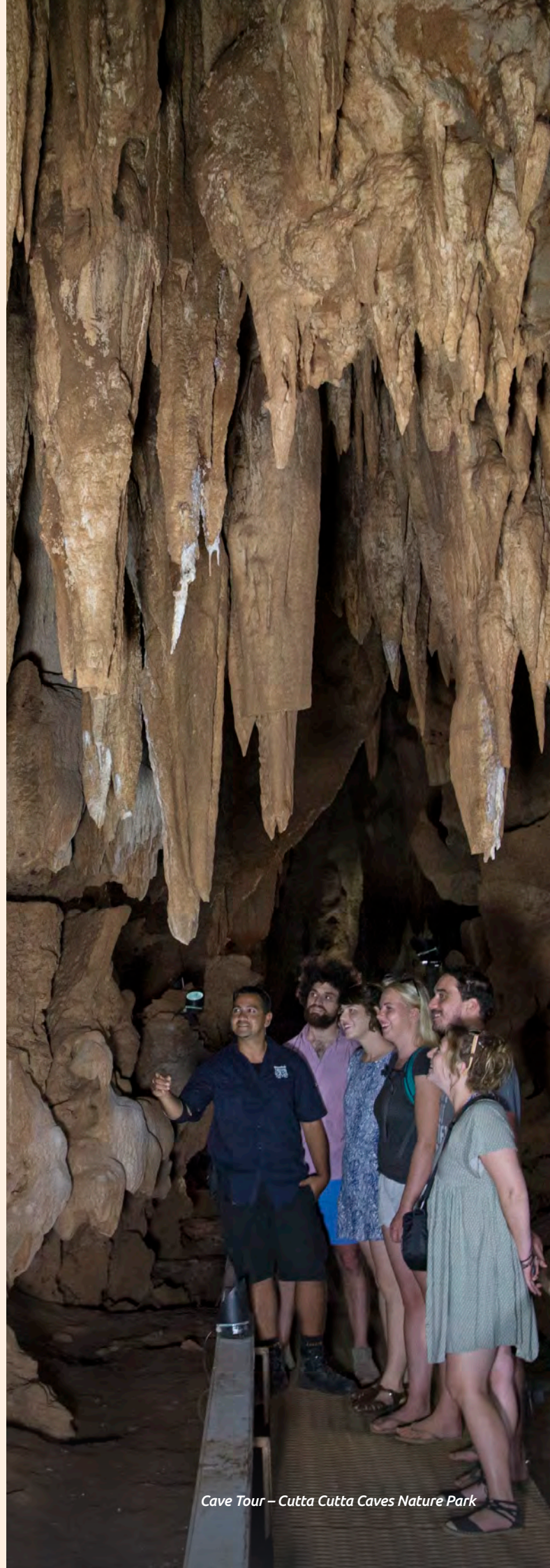
In addition to Regional and Town Councils a number of Aboriginal communities have formed local decision-making agreements and multi-agency partnership implementation plans, including:

- Jawoyn local decision-making multi-agency partnership
- Gurindji local decision-making multi agency partnership implementation plan (Kalkaringi)
- Yugul Mangi Development Aboriginal Corporation LDM multi-agency partnership implementation plan (Ngukkur community).

While all plans are unique, commonalities include a focus on:

- Preserving culture and heritage
- Improvement of community facilities
- Business development and contracting
- Local jobs and training
- Community benefits management.

The McArthur River Mine Charitable Benefits Trust was formed with the local community to contribute to social and economic development in the Region. The governing body for the Trust has confirmed intention to consider an integrated strategy to tourism in the Region, and how the Trust might contribute.



Cave Tour – Cutta Cutta Caves Nature Park

Appendix E - 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.¹⁰⁵

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 number 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.¹⁰⁶ These figures are compounded by an increasing prevalence of persons with a disability, as the population ages and chronic diseases spread.¹⁰⁷ 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. Of these, 85 million are in China¹⁰⁹ and 7.5 million are in Japan.¹¹⁰ With Asian countries accounting for just under half of international visitors to Australia,¹¹¹ and Japan and China being the fourth and fifth biggest source markets in the NT respectively,¹¹² 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. This establishes 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. The guide includes 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.

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.

¹⁰⁵ Tourism Australia, Accessible tourism, <https://www.tourism.australia.com/en/events-and-tools/industry-resources/building-your-tourism-business/accessible-tourism.html>

¹⁰⁶ Australian Institute of Health and Welfare, *People with Disability in Australia*.

¹⁰⁷ World Health Organisation, *World Report on Disability*.

¹⁰⁸ United Nations, *Disability in Asia and the Pacific: The Facts*.

¹⁰⁹ Sixth Tone, *Invisible Millions: China's Unnoticed Disabled People*.

¹¹⁰ Disabled World, *Disability in Japan: Overview and Statistics*.

¹¹¹ Tourism Research Australia, *International Visitor Survey YE September 2019*.

¹¹² 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.¹¹³

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.¹¹⁴

While limited data is available to consider travellers with a disability in the NT, we know that in Queensland, domestic travellers with a disability accounted for 8% (289,000) of the Queensland adult population. The average travel party size was 2.3 for a Queensland resident with a disability. Including children, this accounts for 13% (657,000) of Queensland's total population. Estimated spend for travel parties of persons with disability was \$1.9 billion, roughly 10% of total domestic spend in Queensland.¹¹⁵

Similarly, travellers with a disability represented 7% (349,000) of Victoria's adult population. The average travel party size was 2.2 for Victorian residents with disabilities, which accounted for 12% of Victoria's total population (784,000). The estimated spend for travel parties including a person with disability was \$1.7 billion, 79% of which was overnight spend. This also accounted for 10% of total domestic spend in Victoria.¹¹⁵

Without a study of disability travel in the NT, the 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 product needs

Current statistics indicate that people with disabilities travelled almost as frequently as people without disabilities.¹¹³ 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 13 demonstrates the similarity between cohorts with and without a disability, showing that the demand for products is very similar. This indicates the ability of tourism operators to attract the accessible tourism market by addressing accessibility requirements in many of the Region's existing tourism offerings.

Table 13 - 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*.

¹¹³ Travability, *Understanding the Opportunity for Australia in Accessible Tourism*.

¹¹⁴ Tourism Research Australia, *Accessible Tourism in Victoria and Queensland*.

¹¹⁵ Tourism Research Australia, *Accessible Tourism in Victoria and Queensland*.

Other accessible tourism needs

A Tourism Research Australia study of accessible tourism in 2017¹¹⁶ 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. This presents 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.”¹¹⁷

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.¹¹³

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 amongst this cohort of travellers.

Cost was another important factor for travellers with a disability, who mostly need to travel with a carer, making the cost of travel higher than others. Assistance with these costs or special deals for those travelling with a carer could assist in removing these barriers.¹¹³

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.¹¹³ For the 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.

Current efforts to enhance accessibility at Nitmiluk Gorge, the high proportion of drive visitation to the Region, and the prioritisation of information about accessibility offerings by the accessible traveller cohort, indicates that the focus of efforts to build accessible tourism in the Region should include: enhancing the scale of accessibility offerings in Katherine; 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.

¹¹³ Travability, *Understanding the Opportunity for Australia in Accessible Tourism*.

¹¹⁶ Tourism Research Australia, *Accessible Tourism in Victoria and Queensland*.

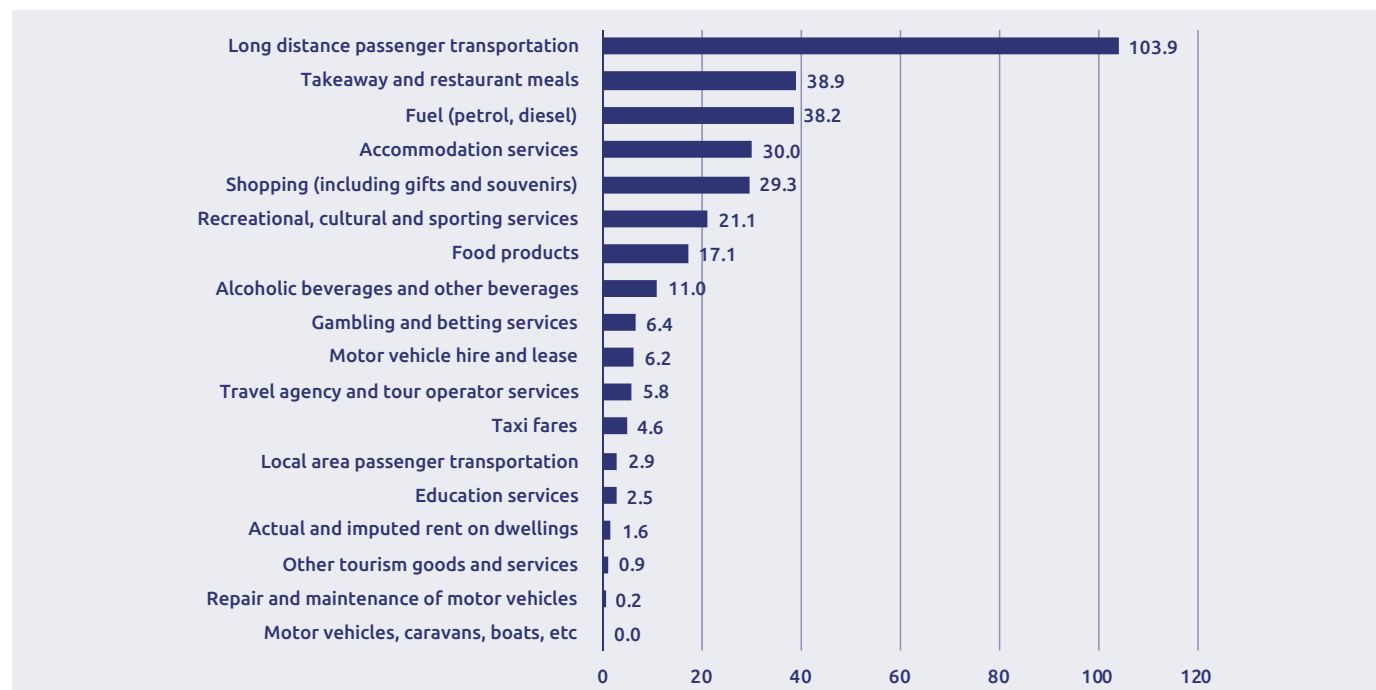
¹¹⁷ Tourism Research Australia, *State of the Industry 2018-19*.



Appendix F - Big Rivers Region visitor market

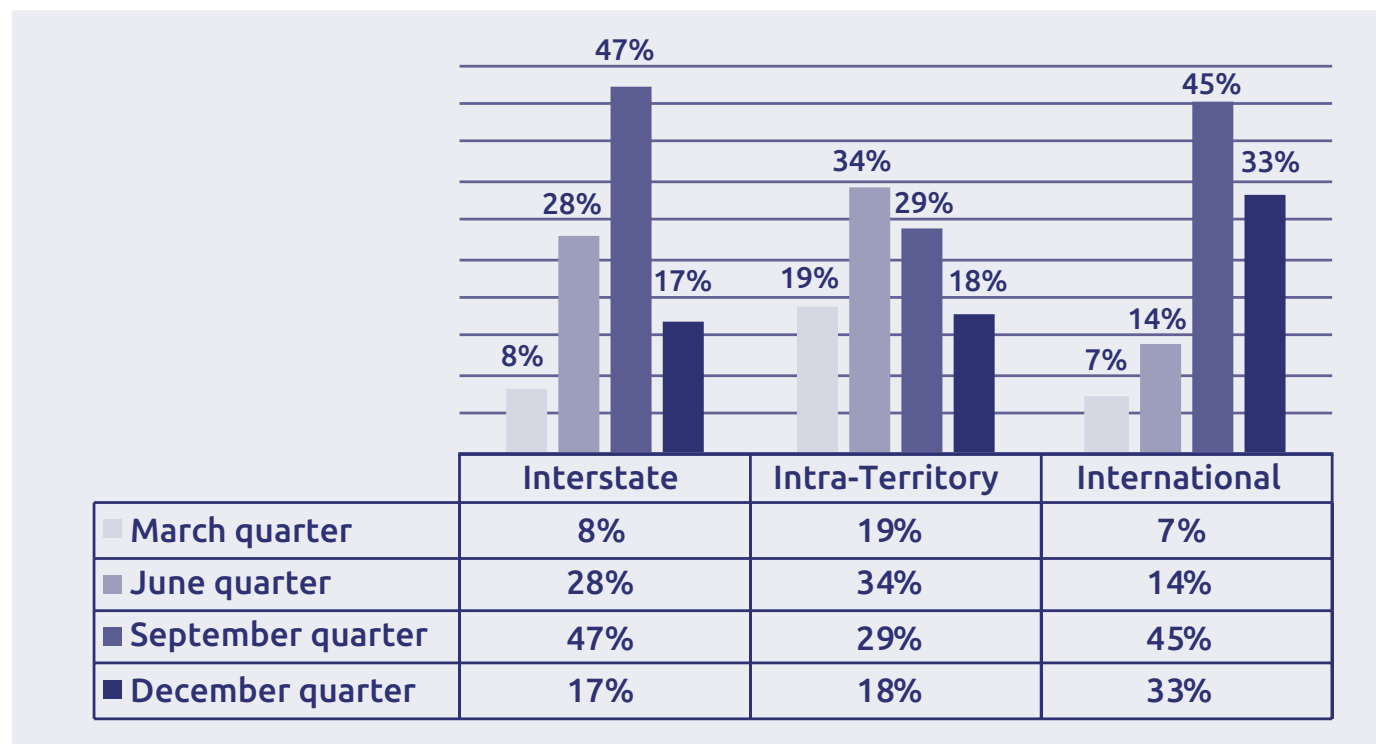
The following charts summarise tourism in the Region.

Figure 9 - Tourism consumption (\$ million)



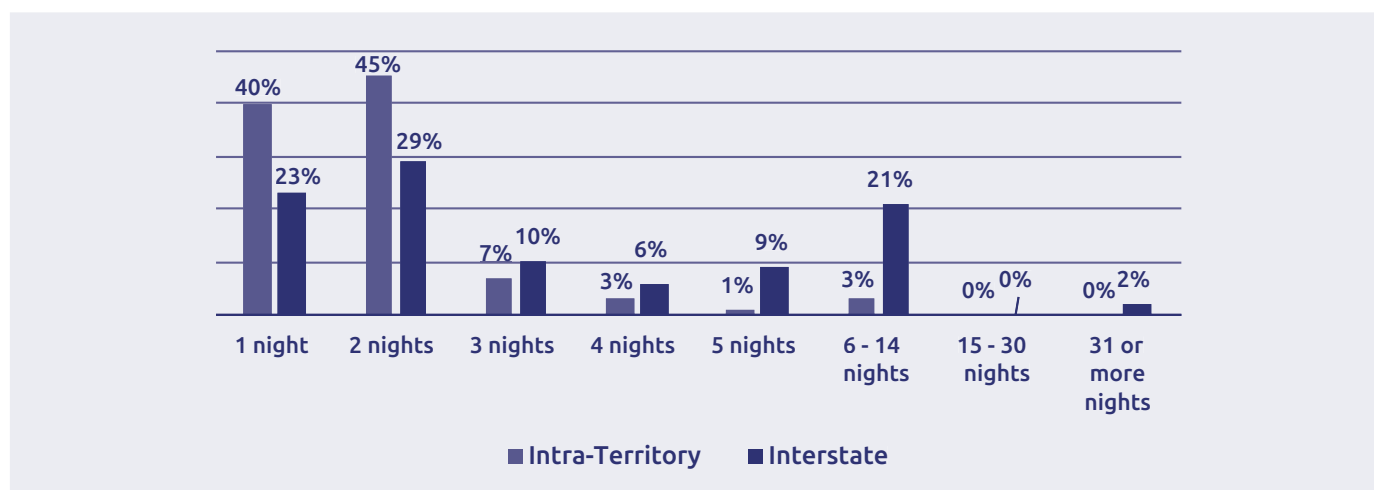
Source: Tourism Research Australia, *Regional Tourism Satellite Account: Katherine Daly 2017-18*

Figure 10 - Visitation by quarter, three year averages YE June 2016-2018



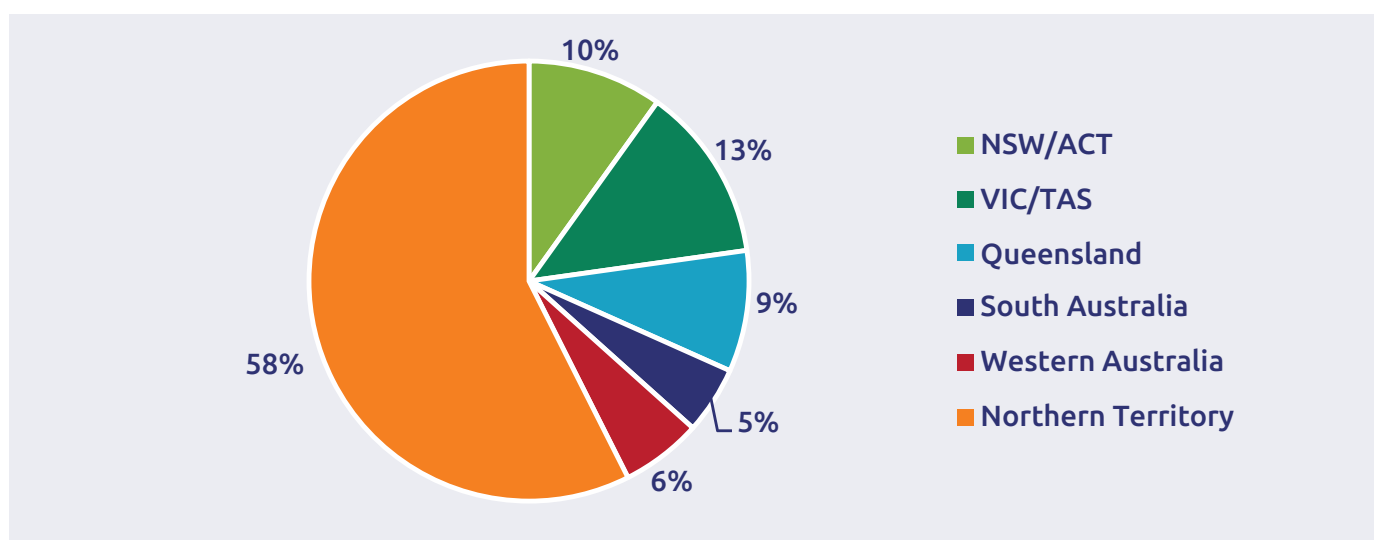
Source: Tourism NT, *Tourism NT Regional Profile: Katherine Daly*

Figure 11 - Length of stay – domestic leisure drive market



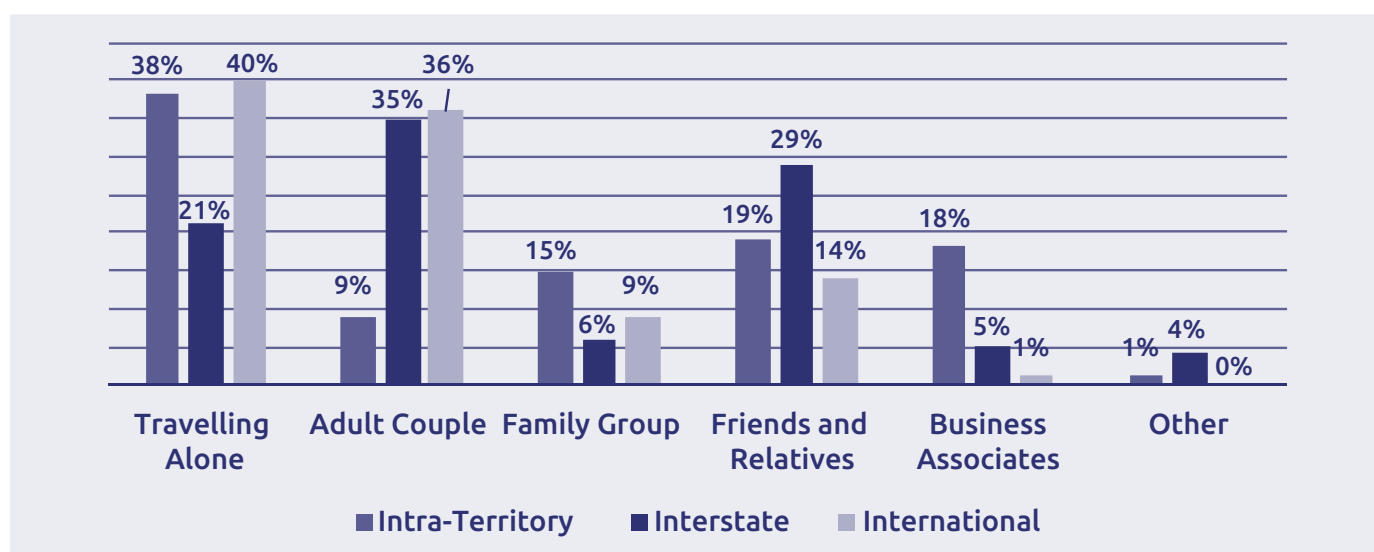
Source: Tourism NT, *Tourism NT Regional Profile: Katherine Daly*

Figure 12 - Domestic leisure drive source markets



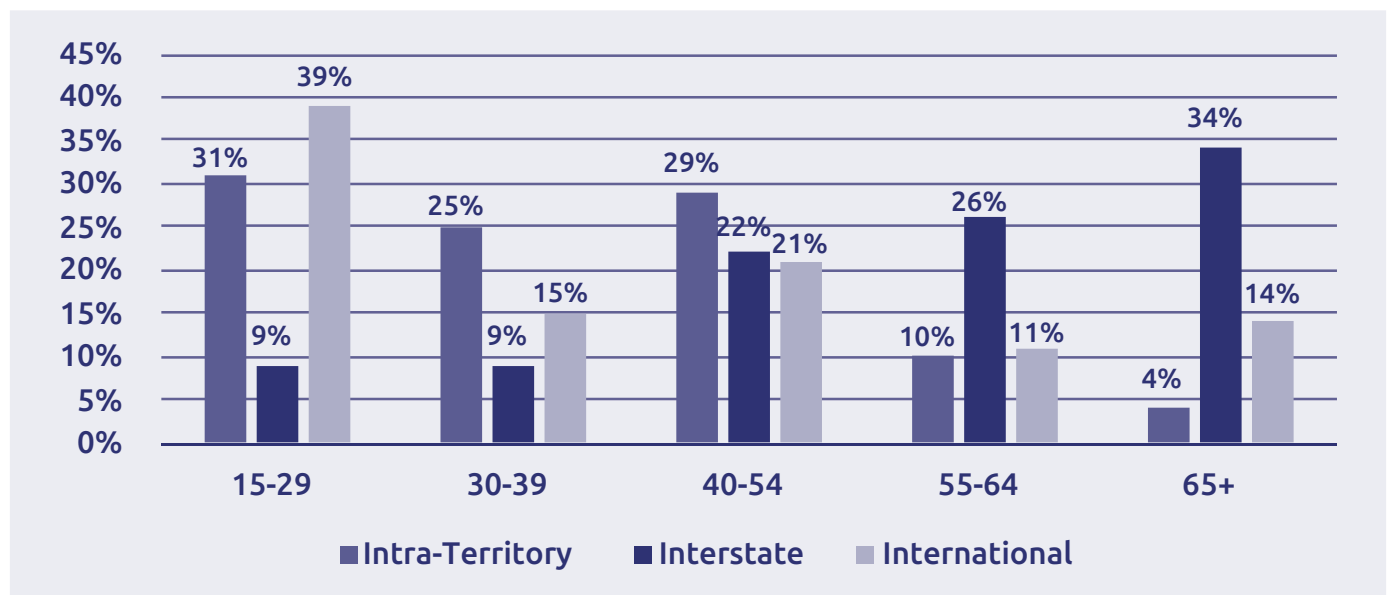
Source: Tourism NT, *Tourism NT Regional Profile: Katherine Daly*

Figure 13 - Visitation by travel party type, three year average YE June 2016 - 2018



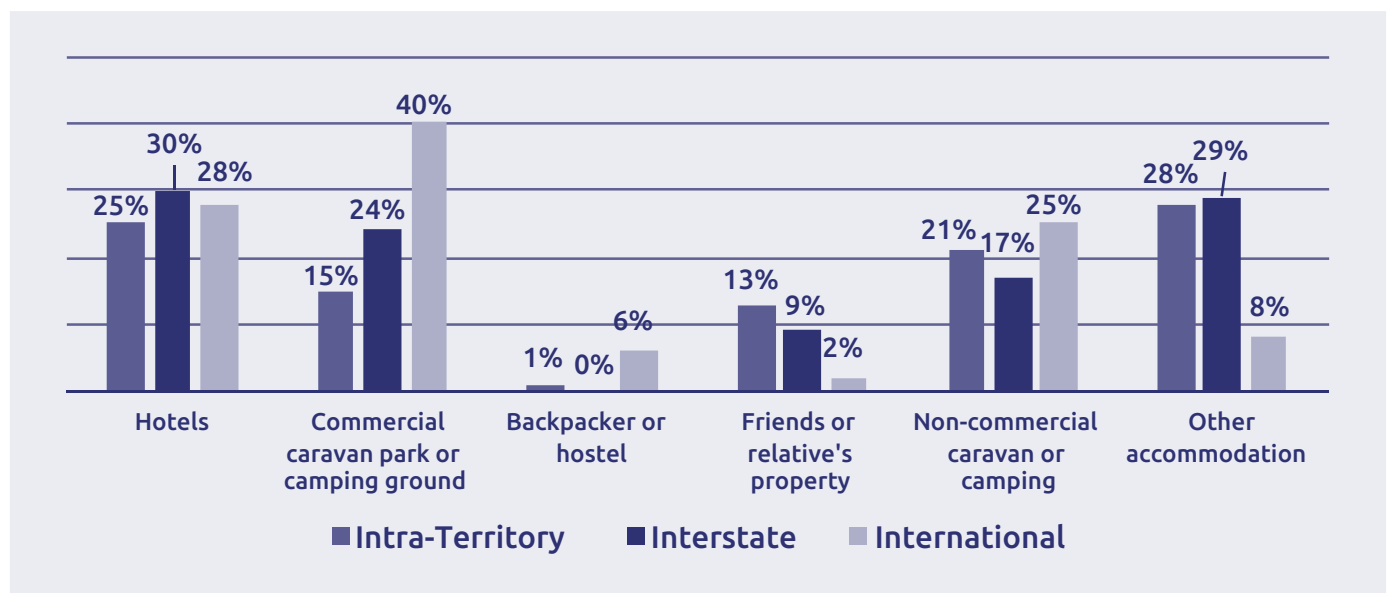
Source: Tourism NT, *Tourism NT Regional Profile: Katherine Daly*

Figure 14 - Visitation by age group, three year average YE June 2016-2018



Source: Tourism NT, Tourism NT Regional Profile: Katherine Daly

Figure 15 - Visitation by accommodation type used, three year average YE June 2016-2018



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

Source: Tourism NT, Tourism NT Regional Profile: Katherine Daly



Appendix G - ReviewPro data analysis

Service

Service was mentioned a total of 267 times, declining by 10 mentions from the year before. The vast majority (79.8%) of mentions were positive. Compared to the year before, the below concepts received a higher proportion of mentions:

Positive	Negative
<ul style="list-style-type: none">• Service• Assistance• Queue• Medical service	<ul style="list-style-type: none">• Treatment• Order• Attitude• Tip• Room service

Staff

Staff were mentioned 1,077 times, increasing by a total of 110 mentions from the previous year. Staff mentions were almost always positive (91.7%), indicating that visitors had an overall pleasant experience with staff. Compared to the year before, the below concepts received a higher proportion of mentions:

Positive	Negative
<ul style="list-style-type: none">• Staff• Team• Communication• Training• Driver	<ul style="list-style-type: none">• Guide• Management• Owner

While the term 'guide' received more negative mentions in the most recent year, it still maintained 93.3% positive mentions, and owner had 85.9% positive mentions, highlighting they were still largely positive.

Value

Value was mentioned 676 times, increasing by a total of 25 mentions from the previous year. These references were largely positive with 71.3% of the references. Compared with the previous year, the below concepts received a higher proportion of mentions:

Positive	Negative
<ul style="list-style-type: none">• Price• Bill• Discount• Deposit	<ul style="list-style-type: none">• Value• Payment• Quality• Fee

Although the concept 'value' received more negative responses from the prior year, 90.5% of its mentions were still positive, implying that overall, value was well-regarded by visitors. Similarly, although the concept 'bill' received more positive mentions this year, its overall positive rating was only 36.8%.



Swimming in waterfall on the Jatbula Trail – Nitmiluk National Park



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