

- **Northern Territory**
- **Cruise Tourism Strategy**
- **2022 - 2025**



**NORTHERN  
TERRITORY**  
TOURISM NT



Front cover:  
Cruise ship in Darwin harbour.

This page:  
Coastline at Bawaka, East Arnhem Land.



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# Foreword

**After a significant pause, we welcome cruise ships back to Top End waters. With biosecurity restrictions placed on cruise ships over the last two years, we now move to a staged resumption of cruising. The Northern Territory Government will continue working with Australian and other governments and agencies to address the near-term impacts of COVID-19, to ensure the medium to long term success, growth and potential of the cruise sector is realised. The Northern Territory tourism industry will play its part in reactivating the sector through this Strategy.**

Notwithstanding the limitations on cruising in recent times, the Northern Territory acknowledges that cruise tourism will return to be a key contributor to the tourism sector. Nurturing cruise tourism through this challenging period, by proactively engaging with cruise lines and industry stakeholders, while providing appropriate infrastructure and services, will ensure the benefits of this sector continue to be attained across the whole of the Northern Territory.

The *Cruise Tourism Strategy 2022 - 2025* provides a framework for the ongoing development of the cruise sector in the Northern Territory. It outlines a series of actions to:

- expand cruise tourism in the Northern Territory to grow the visitor economy
- provide commercial opportunities to Territorians engaging with the cruise sector
- promote Darwin as the preferred cruise gateway in Northern Australia
- promote other Northern Territory cruise tourism destinations thereby distributing the economic benefits of cruise tourism more wide.

The number of passenger days spent in the Northern Territory almost tripled in the ten year period from 2009 - 2019, from 22,873 in 2008-09 to 60,205 in 2018-19. As Australia and the Northern Territory commences the recovery phase, the Northern Territory must maintain our proactive approach in developing the appropriate infrastructure, facilities, and services to support cruise tourism. Further, the Northern Territory needs to adopt a targeted approach to capture specific market segments which provide the greatest opportunity to Darwin and other Northern Territory destinations.

Cruise tourism can offer important economic contributions across the Northern Territory, providing local business owners with an opportunity to benefit from visitor spend. Additionally, it offers a great opportunity to showcase natural assets and Aboriginal culture. Cruise tourism is a great platform to display what the Northern Territory has to offer and entice visitors to return for longer stays.

Cruise tourism contributes to the objectives set out in the NT's Tourism Industry Strategy 2030, to grow the value of the visitor economy and improve the visitor experience.

I acknowledge and thank the Cruise Ship Working Group who met on multiple occasions to discuss the issues, challenges and opportunities facing the cruise sector.

The group worked together to develop the solutions and actions that are necessary to ensure a healthy commercial environment for the cruise sector during the COVID-19 recovery phase and through the medium and long term.

There has been considerable effort across the cruise industry to proactively create COVID-19 safety and response plans for operations guided by health advice from Australia and overseas. The Northern Territory Government looks forward to welcoming cruise ships back to our ports.



Natasha

**Hon Natasha Fyles MLA**  
**Minister for Tourism and Hospitality**  
**May 2022**



Tiwi Islands art sale, Tiwi Islands.

# 1 Introduction

## 1.1 BACKGROUND

The Northern Territory has grown substantially as a cruise destination providing significant benefits to the economy. Darwin is positioned as the gateway to Australia, providing a first point of entry (FPOE) to visiting international ships, while the remainder of the Territory provides unrivalled experiences for expedition cruise ships.

Darwin's geographic location and proximity to Asia make it the logical gateway port to Australia for visiting international cruise ships. The majority of cruise ship activity occurs in Australian waters between October and April, during the southern hemisphere summer which is the traditional low season for the Northern Territory. Expedition cruise operations usually occur over a longer time period which includes the peak tourism season in the Northern Territory, characterised by blue skies and perfect weather.

Darwin benefits as a transition port as cruise ships relocate to the southern hemisphere, often using Darwin as their entry and exit port into and out of Australia.

The cruise sector generated up to \$60 million in total expenditure within the Northern Territory in 2018-19 (CLIA, 2019b). Given the economic significance of the cruise sector to the Northern Territory, ensuring a cruise strategy is in place is vital to providing both internal drivers of growth with an actionable plan, and also signalling the Territory's intent to proactively support the industry.



Mindil Beach Sunset Markets, Darwin.



## 1.2 PURPOSE OF THIS STRATEGY

The Cruise Tourism Strategy 2022 - 2025 (the Strategy) has been developed by Tourism NT in partnership with AEC Group Pty Ltd, major stakeholders from the cruise tourism sector including Darwin Port, the City of Darwin, Tourism Top End, Darwin Waterfront Corporation, Activate Darwin, the Darwin City and Retailers Association and local Aboriginal corporations and communities.

The purpose of the Strategy is to:

1. Identify the opportunities to grow cruise tourism in the Northern Territory.
2. Outline the core activities that will deliver real outcomes from cruise tourism in the Northern Territory.
3. Signal to the cruise industry that the Northern Territory is taking a proactive approach to cruise tourism development and encouraging growth.

## 1.3 APPROACH

The Strategy was developed using the following approach:

- **Cruise Ship Working Group:** key stakeholders were identified and invited to join a Cruise Ship Working Group (CSWG) to ensure people with the ground knowledge were providing insights to the Strategy.
- **cruise industry engagement:** the cruise industry was engaged directly via cruise lines, with key insights captured and relayed back to the CSWG.
- **consultation process:**
  - **workshops:** two workshops were held with the CSWG as part of the consultation process to gather the thoughts of key industry stakeholders.
    - **SWOT analysis:** as part of the first workshop a SWOT analysis was developed, presented, discussed, and validated.
    - **draft strategy:** the second workshop offered an opportunity to review and discuss the draft strategy.
  - **stakeholder interviews:** following the first workshop, further stakeholder interviews were undertaken to ensure that each stakeholder had an opportunity to express their views regarding the growth of the sector.
- **draft strategy:** a draft Strategy was developed with insights captured from industry experts and stakeholders. The draft Strategy was presented to the CSWG and refined following their feedback.
- **final strategy:** the final Strategy was released to the CSWG and the cruise industry.

## 2 Overview of cruise tourism

### 2.1 GLOBAL OVERVIEW

The cruise industry, like all tourism and hospitality industries, has been adversely impacted by the unprecedented spread of the COVID-19 virus. The time it will take for the cruise industry to recover is unclear, however there are signs the industry is beginning to recover, with the Cruise Lines International Association (CLIA) projecting nearly 100% of ocean-going capacity to be in operation by end of July 2022 (CLIA SPI Survey November 2021). Projected global cruise passenger volume is expected to recover and surpass 2023 levels and recover in excess of 12% above 2019 levels by the end of 2026 (CLIA: Tourism Economics).

The global economic impact of cruising is estimated to be over US\$134 billion, creating approximately 1.1 million jobs worldwide (CLIA, 2019). CLIA reports that in 2018 the number of people around the world who took a cruise grew by 6.7% compared with 2017, reaching approximately 28.5 million passengers (CLIA, 2018). More than 45% of global passengers are from the United States of America. Australia is ranked fifth in total numbers of cruise passengers however enjoys the highest market penetration rate in the world (cruise passengers per capita).

As of January 2020, there were 132 new cruise ships worth approximately US\$64 billion on order for delivery over the next 10 years, representing a 42% increase in the global fleet, and a 52% increase in passenger capacity. Shipyards were generally considered to be at production capacity (CLIA, 2018a).

### 2.2 RECOVERY

The recovery of the tourism sector (including cruise) in the Northern Territory continues to evolve with a phased pathway towards the return of normal travel behaviours. The resumption of international travel and the lifting of the Biosecurity declaration on 17 April 2022 which banned the arrival of vessels carrying over 100 persons, will enable the cruise industry to safely resume in Australia.

A number of expedition cruise operators have an interest in recommencing or developing itineraries exploring the Northern Territory coastline, presenting an opportunity to further develop the cruise offering in the Northern Territory.





Tiwi Islands coastline

## 2.3 GLOBAL MARKET TRENDS

There are several factors which will have a significant impact on the global cruise industry in the coming years, including:

- how the cruise industry responds to the significant level of negative publicity and public perception in the wake of the COVID-19 pandemic. This response will need to be two-fold. In the first instance passengers will need to be convinced that it is safe to return to cruising. Secondly, residents of destinations will need to be assured that cruise passengers do not pose an unnecessary health risk to their communities
- a focus on responsible cruise tourism, with stringent health protocols and efforts toward a net carbon neutrality by 2050
- millennials are choosing to prioritise travel over material purchases and are seeking experiential cruises that will generate interest on social media. This change is guiding some new itineraries and destination demand. Millennials are also leading the charge in passengers who plan to cruise again.
- mega cruise ships (>120,000 tonnes) were a significant part of the overall market pre 2020, cruise terminals need to offer flexible services for expedition vessels to mega ships
- technology is becoming an increasingly important aspect of cruising, with a growth in the number of people wanting to be able to continue some level of work while onboard. Therefore, ships and ports are increasingly required to cater for the requirements of their passengers
- Southeast Asian markets are developing rapidly, with Singapore, Indonesia and the Philippines all having active cruise strategies in place. Growth in these markets will offer both competition and opportunities for northern Australian cruise operators and ports
- Indonesia has made several recent regulatory changes, including removing visa requirements for 75 countries in 2015, and changing the docking approval process in 2017, both of which were aimed at reducing regulatory burden on the cruise and superyacht industry. These changes have already resulted in an increase to visitation numbers
- community backlash, and regulatory shifts as governments look to protect the very assets which tourists are coming to see (e.g. Komodo Island fee increase, Venetian community unrest).

### 2.3.1 Key highlights from global market trends for consideration

1. Millennials – seeking experiential cruises with content that generates interest on social media.
2. Expedition cruise – has been growing in popularity and has an opportunity to grow further post COVID-19 by offering a greater number of smaller group experiences.
3. Working while cruising – the increased number of potential visitors interested in working while holidaying.
4. Growth opportunities for Southeast Asian itineraries incorporating Northern Australian ports (including Darwin). This will also be dependent on international border openings.
5. Consideration of regulatory requirements (consider streamlining regulatory requirements for cruise operators and superyachts).



**Katherine Hot Springs.**

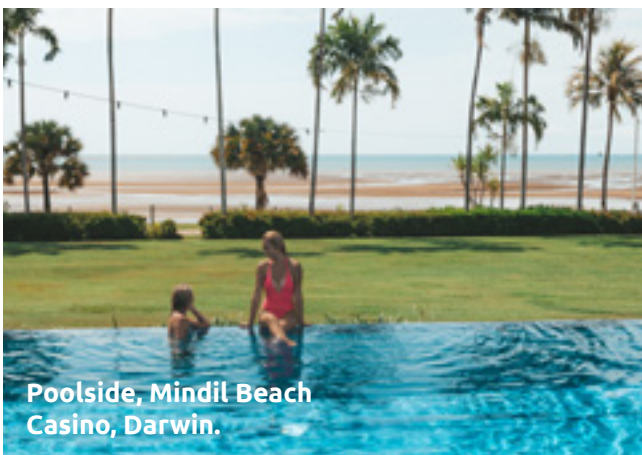
## 2.4 AUSTRALIAN OVERVIEW

Australia held a significant market share of cruising worldwide, accounting for 4.5% of global cruise ship deployments in 2017 (Cruise Industry News 2018), and continues to grow in line with global growth.

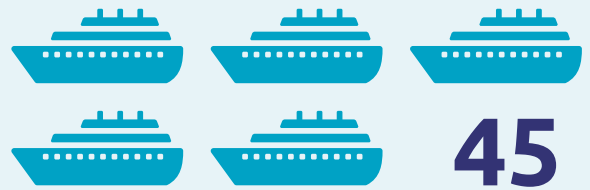
Australia is an appealing destination to domestic and international passengers as it:

- is renowned as a safe destination with good air access into and around the country
- has a well-developed tourism industry and supporting infrastructure
- has an extensive range of natural and cultural assets.
- draws strong emotional appeal for domestic and international cruise passengers.

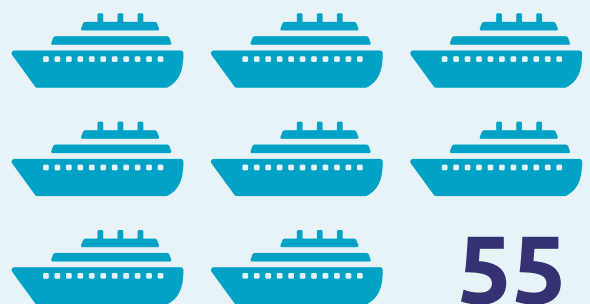
The number of cruise ships in Australia continued to grow to 2020, rising from 45 in 2013-14 to 55 in 2019-20 (an overall increase of 22.2%). In 2019-20 there was a total of 1,035 ship visits to Australian ports, up 34% on the 773 ship visits in 2013-14 (CLIA, 2020).



### Cruise ships in Australia 2013-14



### Cruise ships in Australia 2019-20



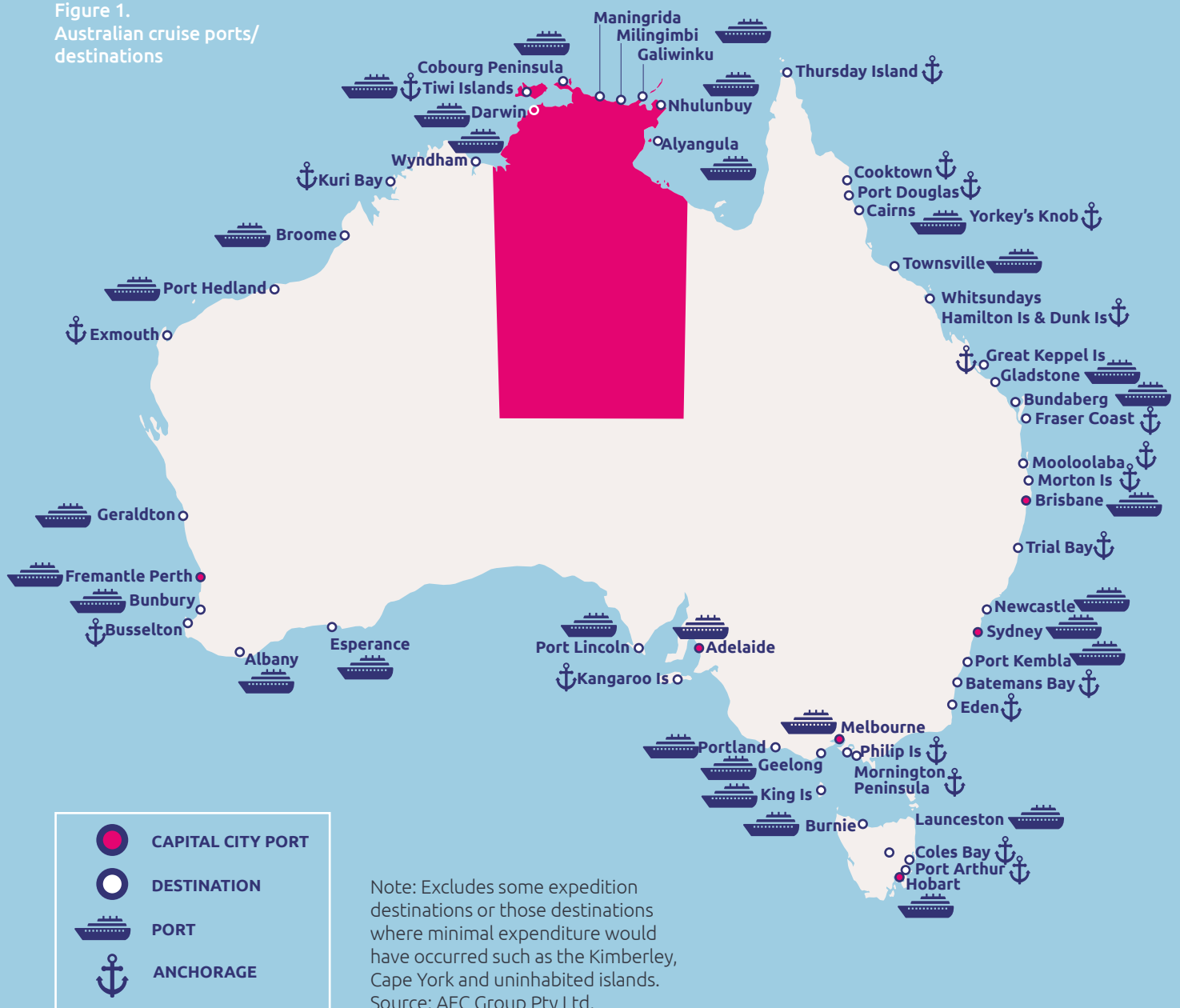
22%



1 035  
SHIP VISITS 2019-20

34%  
increase since 2013-14

Figure 1.  
Australian cruise ports/  
destinations



Capacity constraints at Sydney gave rise to opportunities for further expansion at alternative Australian ports, including:

- **Brisbane International Cruise Terminal:** \$177 million spend completed mid-2020; now capable of berthing the largest cruise ships in the world
- **Port of Broome:** has dredged the berthing pocket to ensure that cruise liners can berth for 24 hours, despite large tidal variations
- **Port of Cairns:** upgraded (\$127 million) facilities and shipping channel allowing for 300-metre ships to dock at the cruise terminal; completed in 2020
- **Eden Cruise Wharf:** upgraded in 2019, the \$44 million wharf extension allows for 325-metre ships to berth
- **Gladstone East Shores Stage 1B:** completed construction of a cruise terminal plaza as part of the \$29.5 million investment
- East Shores (Stage 1B) project, to cater for the expanding cruise tourism business in the region. The area was redesigned to be both a transport interface hub and multi-purpose facility for functions and events, while drawing on the region's industrial heritage
- **Newcastle Cruise Terminal:** a proposed \$12.7m cruise terminal project has been cancelled however \$800,000 in upgrades to mooring bollards will facilitate ships of up to 3900 passengers.

## 2.5 NORTHERN TERRITORY OVERVIEW

In 2019-20 Darwin received 53 cruise ship visits and 8 expedition ship visits, generating a total of 48,534 passenger days, with an additional 9,259 crew days (CLIA, 2020). Other ports throughout the Northern Territory generated an additional three cruise ship visits, and 13 expedition ship visits (Northern Territory Government, 2020). The economic value of the cruise sector across the Northern Territory is estimated at \$84.1 million in output (direct and indirect); direct passenger and crew expenditure at \$24.31 million, with \$15.26 million of cruise line expenditure (CLIA, 2020).

Figure 2. Cruise Ship visits, Northern Territory

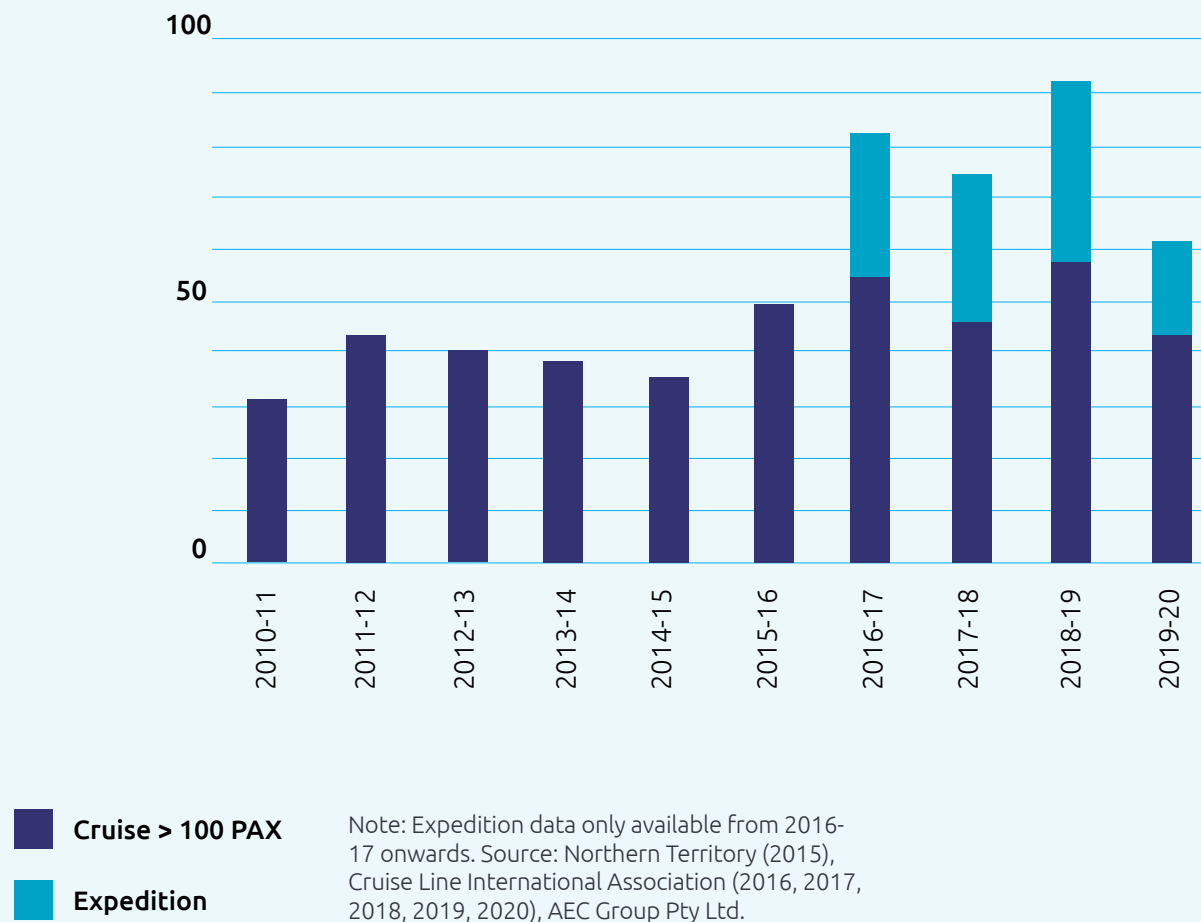
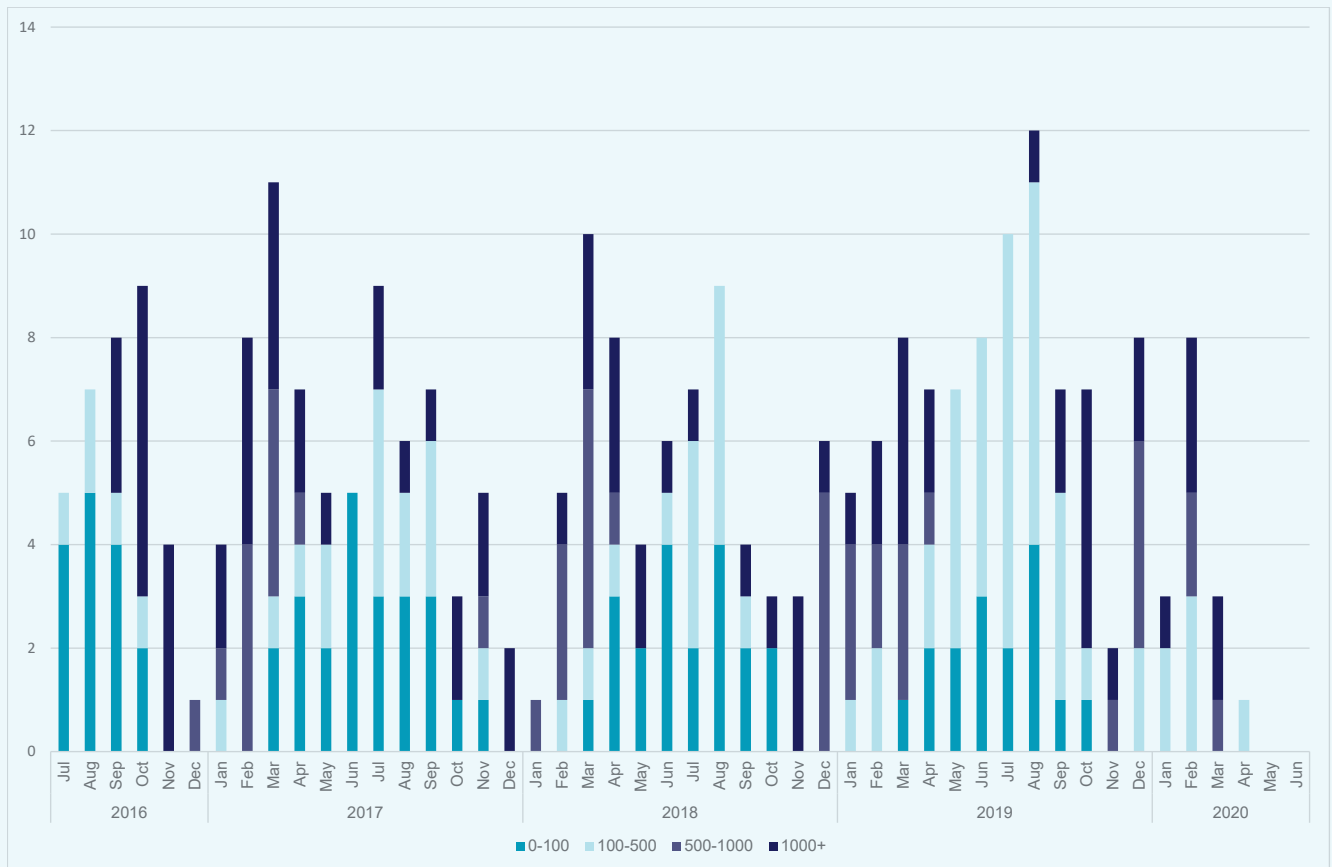


Figure 2 shows the growth of cruise ship visits into the Northern Territory over the 10 years to 2020 (noting that expedition data was not available prior to 2016-17). This figure shows that the cruise sector, while variable, has shown a positive trend.

Figure 3. Cruise visits to Darwin, by passenger capacity



Source: Darwin Port (unpublished), AEC Group Pty Ltd.

Figure 3 shows the number of visits to Darwin by ship passenger capacity between July 2016 and June 2020. Figure 3 highlights that expedition ships tend to operate from March through to October, while the larger ships primarily visit from October through to April. This confirms that the expedition ship market is a critical part of the Northern Territory cruise sector across the year.



Typical cruise patterns to and from the Northern Territory are shown on the following page, indicating the diversity of origins and destinations, and highlighting the level of connectivity with Southeast Asia. While large cruise ships generally visit the Northern Territory as part of repositioning cruises between the Northern Hemisphere and the Southern Hemisphere, they also choose Darwin because of its high-quality facilities, wide array of product offerings, visitor experiences and welcoming community.

Smaller expedition ships specifically visit the Top End to enjoy the unique cultural and geographic offerings of the region, including access to remote Northern Territory ports in Arnhem Land where visitors can engage in Aboriginal cultural experiences. The Top End draws benefits from its proximity to other Northern Australian visitor destinations in the Kimberley and North Queensland.

Figure 4. Cruise arrivals to Darwin, 2018-19  
Source: AEC Group Pty Ltd.



Figure 4 shows the port of origin of cruise vessels prior to arriving in Darwin and shows a similar pattern to that of the outgoing cruise ships, with most originating in neighbouring states or Southeast Asia, with one vessel originating from Japan.

The average duration of all visits to Darwin in 2018-19 was 21.6 hours, with the longest stay recorded by the AIDAvita on both its visits (two and a half days each time), while the Coral Discoverer recorded the shortest stays at just over 9 and a half hours. It should be noted that the Coral Discoverer is performing turnarounds in Darwin, which by their nature are shorter, allowing just enough time to disembark existing passengers, provision the vessel, and embark the new passengers. These turnarounds (onboarding / offboarding of passengers) provide a larger economic impact to the local economy, as passengers have a tendency to arrive a night or two before, and leave a night or two after their cruise, giving them an opportunity to explore Darwin. Increasing the duration of visits is important as it provides visitors with greater opportunities to see local attractions and contribute to the economy.

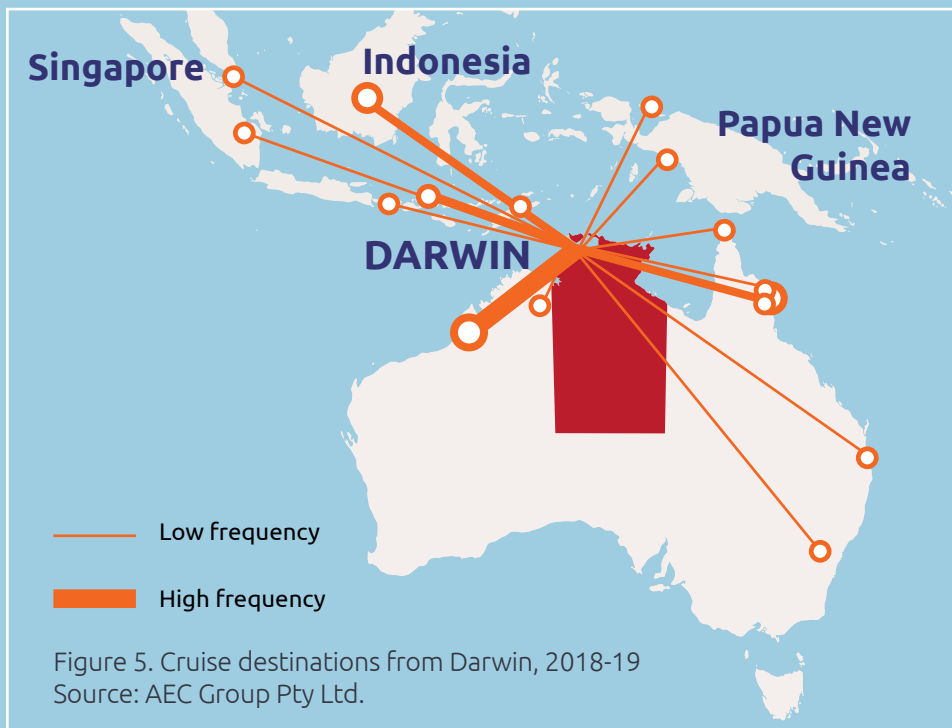


Figure 5. Cruise destinations from Darwin, 2018-19  
Source: AEC Group Pty Ltd.

Figure 5. shows the next port of call following a visit to Darwin. This figure shows several ships head to either Western Australia or Queensland, while an even larger number of ships head into Southeast Asia, signifying the importance of remaining competitive and coordinating efforts with those regions.



**The Northern Territory's dedicated cruise industry have successfully managed an upward trend of tourism growth, however there is no room for complacency in the existing cruise landscape. A proactive attraction program is required to ensure the ongoing success of the industry for all Territorians and to enable the Northern Territory to remain competitive through the recovery from COVID-19.**

## **2.6 EXPEDITION CRUISING**

### **2.6.1 Australia**

Expedition cruising has continued to grow in popularity. Between 2016 and 2017, 12 new expedition ships were ordered, the majority in the luxury category plus several existing luxury ships have been renovated to now cater for expeditions. The growth in expedition cruising is a result of several factors, including:

- travellers who do not find the idea of cruising on a mega-ship appealing
- travellers who view expedition cruises as the only way to access the remote places they have always wanted to explore
- a growing millennial middle class, who prefer experiential holidays.

While the number and size of mega cruise ships continues to grow and become an increasingly larger slice of the overall cruise market, the expedition sector is growing strongly in its own right.

### **2.6.2 Northern Territory**

The Northern Territory is particularly attractive to expedition cruise passengers and operators owing to a range of factors, including:

- Darwin Port is well-resourced and capable of provisioning expedition vessels
- Darwin's location as a conduit between Western Australia (the Kimberley, Broome, and Fremantle) as well as connectivity through to Queensland's tropical coastline and the Great Barrier Reef
- the Northern Territory's rich natural assets and culture including opportunities to visit Aboriginal communities, engage in cultural experiences, and explore art centres
- a chance to enjoy the warmth of the Top End and escape the cooler southern climates through the months of April – October.

**Bawaka, East Arnhem Land.**





## 2.7 COMPETITION & COLLABORATION

Cruise lines operate on itineraries, and therefore no one destination can operate in isolation. The growth of a neighbouring port may mean more business as cruise lines increase the number of ships heading to that port. Alternatively, it could signal a downturn, as cruise itineraries divert to the growing neighbour. Therefore, while attracting cruise lines is a competitive landscape and a proactive approach is imperative to sustaining growth (especially turnarounds), collaboration with neighbouring cruise destinations on an itinerary is also critical to capture market share from global competitors. Developing unique tourism offerings different to that of neighbouring and other ports is essential to attracting ships across itineraries.

Investment in infrastructure (e.g. ports and terminals), services (e.g. dedicated cruise liaisons, visitor welcoming staff) and

marketing are all normal activities for cruise tourism attraction.

Various jurisdictions have developed collaboration opportunities enabling cruise destinations to meet and work on their collaborative offerings and synergies. The Western Australia Cruise Exchange is one example of networking and collaborating on product. Given the existing expedition cruise itineraries operating between the Northern Territory and the Kimberley region of Western Australia, there is an opportunity for the Northern Territory to continue to foster links with Western Australian destinations and consider collaborative offerings, particularly for domestic expedition cruise offerings as the cruise industry emerges from COVID-19 restrictions.

### Case Study 1: Western Australia Cruise Exchange

The Western Australian Cruise Exchange (WACE), has been hosted by Tourism WA five times since 2013, and in 2019 attracted representatives from eight global cruise lines to Western Australia for workshops and networking opportunities.

The WACE offers opportunities for representatives from each of Western Australia's port destinations to pitch their business to key players from the cruise industry. In 2019 a total of 11 destinations were in attendance, along with the Western Australian Indigenous Tourism Operators Council.

The event typically runs for two nights and allows each destination an opportunity to present their destination and associated services directly to cruise line executives. It also offers the opportunity for delegates to experience some of the onshore experiences firsthand, adding to their appreciation and understanding of what the destination has to offer.

# 3 Situational analysis

**The Northern Territory has a natural advantage for cruise tourism based on its geographic and cultural offerings, in addition to its strategic positioning close to the growing Southeast Asian market. Taking advantage of these competitive advantages could result in strong and continued growth in cruise tourism across the Territory.**

The Northern Territory has several competitive advantages in cruise tourism, including:

- unique and typically ‘Australian’ geography and landscapes
- proximity to growing Southeast Asian markets
- authentic cultural offerings and Aboriginal experiences
- bucket list icons such as Uluru-Kata Tjuta and Kakadu National Parks.

However, the Northern Territory also faces some inherent challenges to its tourism sector. Given the remoteness of the region, travel to and from the Northern Territory can be expensive. Further, there is a relatively small local population base which makes the Northern Territory an unlikely location for large cruise ship turnarounds and home porting.

The Northern Territory has several weaknesses impacting cruise tourism, including:

- inadequate transport infrastructure capacity for destination access (air and rail) and accommodation to support turnarounds of larger vessels
- the Darwin Cruise Ship Terminal is only capable of accommodating one large vessel at a time
- limited options of short on shore excursions (most require 8 to 9 hours)
- remote port destinations have limited transportation infrastructure to take passengers from shore to alternative destinations
- the short duration of time in port impacts on cruise passengers ability to visit icons of the NT such as Kakadu National Park and the Katherine region including Nitmiluk National Park
- the primary cruise season in Australia is from October – March, the humidity and heat in the Top End at that time of year can affect cruise passengers plans to explore the region or walk around the CBD. Visitor perception of the region may be impacted potentially reducing the likelihood of a repeat visit in the NT’s peak season. Heat mitigation measures have been undertaken in Darwin to assist with cooling, including extended shade coverings over walking paths, the Civic and State Square Masterplan which will create a tropical, cool, shaded oasis in the city and e-scooters offer visitors an alternative to walking.



Cultural tour, Tiwi Islands.



Helicopter tour, Uluru Kata Tjuta National Park.

### 3.1 OPPORTUNITIES

Capitalise on the domestic travel market (in the short term) as Australians look for alternative travel destinations and take advantage of Australia as a safe haven for international travellers. This should incorporate clear messaging to domestic audiences about the Northern Territory's unique selling points including space, bucket list icons and Aboriginal cultural experiences and safety.

Attracting more cruise ship visits by developing infrastructure and experiences along the coastline between Wyndham and Darwin, and Darwin and Cairns. New infrastructure should be aligned to access to different experiences / landscapes to offer cruise visitors a value add to their itinerary.

Strengthening the levels of engagement and collaboration between key players in the local industry (including Tourism NT, Tourism Top End, Darwin Port, Darwin Waterfront Corporation, the Darwin City Retailers Association, City of Darwin and tour operators).

Development of experiences and packages designed to accommodate the short time in port which also considers possible impacts of heat / humidity on the visitor experience.

Providing more information to cruise lines, crew and passengers regarding unique experience offerings in the Northern Territory (including new product offerings).

Embracing and being proactive regarding the changing maritime view towards environmental sustainability (shore power and LNG bunkering).

Focusing on expedition ships as a primary market segment for turnaround, home porting and longer pre and post cruise stays.

Encouraging transiting cruise ships to stay longer. A two-night stay is an ideal length of time and would facilitate an extended duration for shore excursions (greater than 8 hours), in the Northern Territory.

Exploring infrastructure upgrades to Fort Hill Wharf to accommodate larger vessels (Oasis class).

Growing visitation in the cruise low season (April through October).

Developing new product and services to leverage planned infrastructure investment such as the Larrakia Cultural Centre and Gove Port Tourism Hub.

Developing remote Northern Territory port destinations and cultural experiences.

### 3.2 THREATS

Uncertainty over the number of cruise ships operating, itineraries and capacity when cruising re-emerges post COVID-19 shutdown.

Community and consumer concerns about cruise ship safety on board and on shore excursions.

Delays to infrastructure and service improvements, particularly for larger vessels, which could lead to diminishing market share.

Expensive flights into and out of Darwin, as well as flight and route availability during the recovery phase from COVID-19.

Limited accommodation options for high end visitors.

Possible friction between cruise and expedition ships as berthing capacity becomes constrained. Cost of visiting Darwin considered higher than other destinations by cruise lines.

Regulatory changes (both domestic and abroad) having an adverse impact on the Australian cruise industry (e.g. Komodo Island Annual Fee).

Disruption to itineraries due to unforeseen adverse weather, cultural closures or other events such as public health issues.

Limited experiences available as businesses reemerge.

## 4 Strategic pillars

There are four strategic pillars within the *Cruise Tourism Strategy 2022 - 2025*. While the Strategy takes a three-year view it should be noted that infrastructure investment operates over a longer investment horizon, and with longer lag times. Therefore, the Strategy looks at infrastructure from a near (0 – 5 years), medium (5 – 10 years), and aspirational (10+ years) standpoint.

As cruise itineraries are prepared 2-3 years in advance the earliest the Northern Territory could ordinarily influence itineraries through this Strategy would be 2024 - 2023. However, in the aftermath of the COVID-19 pandemic, there is an opportunity to establish new itineraries in the near future.



### Cruise ship attraction

Increasing the number of ship visits, and therefore visitors, is the simplest way to increase the economic benefit to the Northern Territory from cruise tourism. However, passenger demographics should also be considered, as not all passengers deliver the same benefit to the economy. Equal focus should be given to the smaller expedition market, where passengers are generally higher spenders.



### Onshore experience

Continue to develop and support the growth of exceptional retail and shore excursion experiences that cater for the length of time in port with consideration of the climate conditions throughout the Top End.



Cultural experience,  
East Arnhem Land.



## Infrastructure and operational support services

Ensuring cruise ship infrastructure and facilities are currently appropriate for customer expectations, and confirming that they will be suitable to meet future markets and demands. Cruise tourism can place pressure on the resources of smaller communities. Therefore, ensuring adequate operational support services are in place to support cruise tourism is critical to minimising the impact on the community, and ensuring cruise passengers have a positive experience in every Northern Territory destination.

## Communication and collaboration

Enhance and maintain communication with cruise lines and relevant stakeholders. Review the actions of the Strategy and its impacts to ensure they are delivering the desired effect, and communicate updates with all stakeholders. Collaborate and engage with neighbouring destinations to ensure a targeted and coordinated approach is in place for overall cruise tourism development.

# 5 Cruise ship attraction

## 5.1 STRATEGIES

Strategies to be pursued for cruise ship attraction include:

- 5.1.1. Increase the number of passenger days in ports across the Northern Territory.
- 5.1.2. Maximise the number of home ported expedition vessels in Darwin servicing Northern Australia.
- 5.1.3. Increase the number of expedition ship visits.
- 5.1.4. Develop new itineraries by working with neighbouring destinations and cruise lines.

## 5.2 BACKGROUND

Research indicates that the expedition market provides a greater return per passenger relative to larger ships; while home port passengers spend over two times more per day, relative to transit passengers (CLIA, 2019b). The Northern Territory should focus on supporting and growing the expedition cruise market, specifically the number of home port expedition ships, while continuing to support the ongoing growth of larger cruise vessels. Expedition ships typically play host to higher net worth individuals, which means a greater impact on the economy on a per passenger basis, while imposing a

smaller strain on the resources of the community associated with the larger cruise ships. Due to the more localised itineraries and smaller capacity of expedition cruise ships, their operations will commence earlier during the recovery phase than the operations of large cruise vessels.

To support both expedition and larger cruise vessels, it is critical that cruise lines are engaged with and supported in their itinerary planning processes. Cruise itineraries are normally established 2-3 years in advance, therefore engagement with the industry needs to be maintained on an ongoing basis to support future growth. Ensuring cruise lines have a single point of contact, and clear line of sight to existing and new cruise opportunities and experiences in the Northern Territory is essential to supporting growth.

The importance of engagement has increased, as information and situations change rapidly. The ability for the Northern Territory to respond quickly to evolving issues and opportunities will assist the Northern Territory to rebound in a strong position as domestic and international markets resume.

In order to attract and maintain cruise ship visitation and promote the visitor experience, there are several factors that need to be prioritised and coordinated.

This includes engaging with the Cruise Ship Working Group and other partners to ensure that information is shared and opportunities to improve the visitor experience are explored. Factors to

be considered include:

- co-ordinating meet and greet activities
- communication to key stakeholders and businesses about cruise ship arrivals one to two weeks prior
- arrival – providing times, ship information and handy hints
- working to ensure a positive visitor experience by distributing CBD / town maps and tour information to cruise visitors on arrival
- ensuring adequate shade and seating for cruise visitors.

## 5.3 SECTORING

Opportunities are presented to extend the duration of the onshore experience by sectoring ships in Darwin. Sectoring allows passengers to extend their stay in the Northern Territory, with tour packages including additional Top End experiences and The Ghan rail trips. There is potential for packages to include travel to Central Australia into Alice Springs and Uluru-Kata Tjuta National Park.



The Ghan travelling through the Outback

## Case Study 2: Holidays of Australia – sectoring

Holidays of Australia is a leading provider of rail and cruise packages in the Australian domestic market. Holidays of Australia has arrangements with Princess Cruises, Royal Caribbean and Cruise & Maritime Voyages allowing cruise passengers to disembark & embark during a scheduled cruise.

Holidays of Australia ‘sectoring’ cruise passenger numbers represented approximately 2.9% of total cruise ship passengers to the Northern Territory in the 2018-19 FY.

Sectoring has offered a further opportunity for cruise companies such as Princess Cruises to distribute their product.

Regarding their partnership with Holidays Australia, Trevor Thwaites\* of Princess Cruises said in December 2018:

“I’m really excited about the growth we can collectively achieve over the next couple of years, as the “hub” you have created in Darwin has brought in a new channel of business to us. We absolutely wouldn’t have embarkation or debarkation in Darwin without the work you have done with Tourism NT and Great Southern Rail. Hopefully with the added cruises in the traditional winter down times over the next couple of years, there will be even more opportunity for growth.”

*\*National Sales Manager NSW/ACT/SA/WA for Princess Cruises.*

## 5.4 PERFORMANCE MEASURES & TARGETS

Performance measures and targets relevant for demonstrating success in attracting more cruise ship visits:

**Table 1. Cruise ship attraction performance measures and targets**

Performance measure	Baseline*	Unconstrained target	Data source
Transit passenger days	57,306	3.0% growth p.a.	CLIA
Turnaround passenger days	2,899	3.0% growth p.a.	CLIA
Increase sectoring passengers via Northern Territory cruise packages/sales in trade partner campaigns	2.9% of all passengers in 2018-19 contributed to trade partner campaigns	Targets are established for each trade campaign, considering previous performances  3.0% growth p.a.	Tourism NT
Proportion of home ported expedition vessels regularly servicing Northern Territory	Approximately 40%	> 50% of total expedition vessels	Tourism NT / Darwin Port
Expedition ship visits	18	3.0% growth p.a.	CLIA
Cruise ship visits	58	3.0% growth p.a.	CLIA

\*Due to COVID19, 2018-19 baseline data has been used to measure performance targets.



# 6 Onshore experience

## 6.1 STRATEGIES

Strategies to be pursued for onshore experience include:

- 6.1.1. Increase the average spend per passenger.
- 6.1.2. Improve customer satisfaction with shore experiences and retail offerings.
- 6.1.3. Increase length of stay of transit and pre/post (turnaround) stays.
- 6.1.4. Enrich the product offering for short stay (<8hr) onshore experiences.

Therefore, having a robust retail and shore excursion offering is critical to ensuring the local community benefits from visitors to its region.

Ensuring passengers have a positive experience will encourage future cruise line visits, non-cruise revisitation and word of mouth / online recommendations to others. It is vitally important for a cruise destination to offer a variety of high-quality short duration onshore experiences available for distribution to cruise ships. Supporting and nurturing the development of new experiences established by the local industry, as well as creating awareness with cruise lines of the available products is critical to growing this lucrative sector of the cruise market.

Passenger mobility between the Darwin Waterfront, the Cruise Ship Terminal, Smith Street Mall, and the Esplanade has been a major concern for cruise visitors to Darwin. Much work has been implemented to improve connectivity for passengers (including shaded walkways, shuttle

buses and e-scooters), however ongoing efforts in this area should ensure natural visitor flow remains a key consideration to enhance passenger connectivity.

Accessibility is an important focal point for tourism generally, and especially so for cruise tourism which historically has supported an older demographic. As the world population continues to age and live longer, accessible travel will continue to grow. Darwin should continue to work towards positioning itself as a destination with accessible and inclusive onshore experiences.

There is an increasing trend for passengers to disembark and stay longer in one location before the vessel returns to a port after having made other stops (CLIA, 2019b). This requires locations to have more experiences and activities that cater to extended stayers. In Darwin, this would allow some passengers to explore Kakadu or Nitmiluk National Parks, take The Ghan to Adelaide, or choose an expedition or superyacht cruise charter by sea.

## 6.2 BACKGROUND

Shore excursions, retail and entertainment form the bulk of visitor expenditure while in port (especially when all-inclusive meal plans are standard on board ships).

## 6.3 PERFORMANCE MEASURES & TARGETS

The following table contains performance measures and targets to gauge the impact of the shore experience strategic pillar.

Table 2. Shore experience performance measures and targets

Performance measure	Baseline*	Unconstrained target	Data source
Total cruise visitor expenditure (passengers and crew)	\$22.16 million	3.0% growth p.a.	Tourism NT
Customer satisfaction	>90% overall satisfaction	>95% overall satisfaction	Tourism NT
Increase the average length of transit stay	21.6 hours	>24 hours	Tourism NT

\*Due to COVID19, 2018-19 baseline data has been used to measure performance targets.

# 7

## Infrastructure and operational support services

### 7.1 STRATEGIES

Strategies to be pursued for infrastructure include:

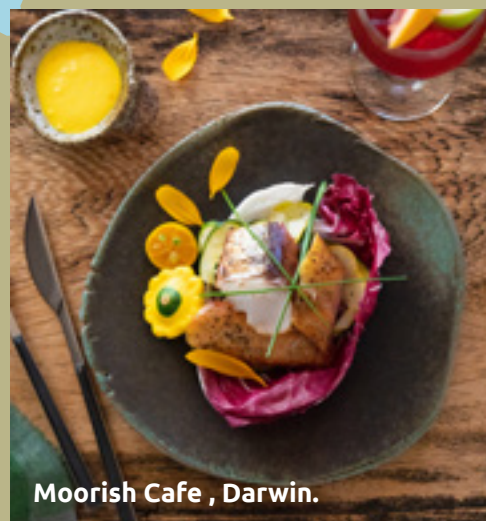
- 7.1.1. Expand berthing capacity at Darwin Port.
- 7.1.2. Expand infrastructure capabilities at regional ports to accept expedition cruise vessels throughout the Northern Territory.
- 7.1.3. Implement infrastructure improvements to support cruise industry transition to sustainable cruising.
- 7.1.4. Increase the level of Northern Territory produce consumed on board cruise ships.



Parap Markets , Darwin.



Cage of Death, Crocosaurus Cove, Darwin.



Moorish Cafe , Darwin.



Buku-Larrnggay Mulka Centre, Yirrkala, Arnhem Land.

Figure 6. Northern Territory ports and anchorages



## 7.2 BACKGROUND

Strategically timed investment in cruise infrastructure is necessary to ensure the continued growth and success of cruise tourism in the Northern Territory as well as the efficient deployment of constrained capital funds.

Infrastructure development is required to meet the needs of both the cruise operators from a practical point of view (berthing, bunkering, water and waste), while also meeting the growing expectations of passengers (comfortable terminals, fast WiFi).

Infrastructure planning needs to consider broader changes in the market, and opportunities to capture more of the exploration cruise market in smaller remote destinations. The first step in developing the appropriate infrastructure is understanding and then aligning what is available with what the market demands.

Operational support services need to be developed and grow in tandem with the associated infrastructure to ensure they complement each other.

The Darwin Cruise Terminal was designed to service transit passengers only and needs improvements to handle turnarounds. The facility is suitable for up to 300 passengers, however, beyond this is constrained.

Therefore, in the absence of any physical expansion options should be investigated to alleviate constraints, such as:

- offsite check ins
- utilise the Darwin Convention Centre to take pressure off the terminal
- improve the terminal layout and passenger flow.

The cruise industry offers a potential opportunity for local businesses who provide goods and services to passengers when they disembark. However, an often-forgotten opportunity for local businesses is to sell to the cruise lines themselves. Adopting a strategy to increase the volume of Northern Territory sourced goods (such as fresh produce, fuel, water, etc.) provided on cruise ships will result in positive and potentially significant impacts to the local economy.

One aspect of this would also include maintenance. The Darwin Ship Lift Facility (due to become operational in 2024) will have the capacity to take ships up to 5,000 tonnes out of the water. This is large enough to facilitate ships such as Island Sky and Caledonian Sky and offers an opportunity for the Northern Territory to increase its competitive advantage in the expedition ship business.

The operational support services required by the cruise industry require specific skills (e.g. food preparation, ship maintenance). Therefore, ensuring appropriate skills are available in each port to support the cruise industry is essential to growing the sector. There is strong alignment with Darwin's already skilled marine services sector to support this moving forward.

The 10 Year *Infrastructure Plan 2018-2027* (the Plan) developed by the Northern Territory Government Department of Infrastructure, Planning and Logistics identifies priority infrastructure projects which will contribute to the long-term economic growth and success of the Northern Territory. The Cruise Tourism Strategy 2022 - 2025 endorses these as being as essential to the sustainable growth of cruise tourism across the Territory.

The plan identifies the following projects and opportunities in relation to cruise tourism:

- extend the quay line of Fort Hill Wharf to enable two ships to berth simultaneously
- upgrade Fort Hill Wharf to accommodate Oasis class vessels (detailed design has been completed by Darwin Port)
- consider upgrades to Stokes Hill Wharf to accommodate vessel overflow capacity
- develop Gunyangara (Gove Port) Tourism Precinct, including cruise ships, recreational fishing and leisure craft facilities
- implement the Gove Port Industry Development Strategy to drive fisheries, transport and logistics,

marine services, and tourism sector growth.

Further to these proposed works, general changes across the cruise and related industries more broadly might result in challenges and opportunities for the Territory, these include:

- sustainable cruising is becoming a key consideration for both passengers and cruise lines alike, and many of the new vessels are now being built with the ability to be fuelled by LNG, (for example Carnival’s AIDAnova) and other vessels are being converted so they are able to use LNG. This requires ports and infrastructure to adapt and presents an opportunity for Darwin Port to consider LNG bunkering in the medium to long-term
- there is an opportunity to consult with communities and explore the prospect to develop cruise tourism which leverages off the barge landing upgrades proposed by the Northern Territory Department of Infrastructure, Planning and Logistics
- it is becoming more common for vessels to ‘plug in’ when they are at berth. Rather than running their generators and emitting smoke out of their stacks, they connect to shore power (‘cold ironing’).

However, this imposes a large power demand on the grid, which can be a constraint. The Northern Territory Government should consider this going forward and possibly review power demand / supply and support infrastructure required

- the *Marine Pollution Legislation Amendment Bill 2019* adds support to a quicker transition towards both cleaner fuel and the use of shore power
- a project scoped for the HMAS Coonawarra facility will see the development of a new 250m wharf. The facility could alleviate some congestion from Fort Hill Wharf and increase the number of days that cruise ships are able to berth. In addition, East Arm Wharf is an alternative overflow facility which is available to operators should it be required
- since the *Cruise Activation Strategy 2015-2020*, the Darwin Port has been leased to Landbridge on a 99-year lease. Ensuring the relationship between the Northern Territory Government and Landbridge is maintained at current high levels will be critical to the ongoing success of cruise tourism in Darwin, and across the Northern Territory.

### 7.3 PERFORMANCE MEASURES & TARGETS

The following table indicates performance measures and targets relevant for demonstrating success in developing appropriate infrastructure to support the cruise industry.

**Table 3. Infrastructure performance measures and targets**

Performance measure	Target	Data source
Number of vessels with existing bookings moved to alternative sites	0	Darwin Port
Number of regional ports visited by cruise or expedition ships per annum	>8 regional ports visited	Tourism NT
Passenger satisfaction with Darwin’s amenities	>90% satisfaction	Cruise passenger survey when undertaken

# 8 Communication and collaboration

## 8.1 STRATEGIES

**Strategies to be pursued for communication and collaboration include:**

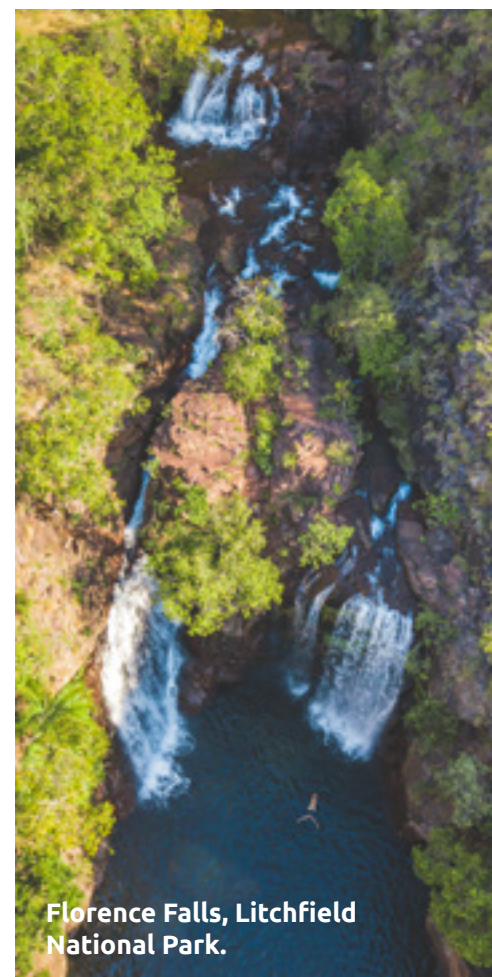
- 8.1.1. Strengthen understanding of the drivers of growth in Northern Territory cruise tourism.**
- 8.1.2. Monitor ongoing efforts toward completing the Strategy and ensure appropriate resources are being applied.**
- 8.1.3. Keep stakeholders informed, so everyone has a clear picture of the work being undertaken and its success.**
- 8.1.4. Continue to partner with cruise lines, stakeholders, and regionally proximate destinations to develop and support the industry.**
- 8.1.5. Prepare and maintain information relevant to Northern Territory cruise destinations.**

## 8.2 BACKGROUND

Significant work has been undertaken and progress achieved during the previous Cruise Sector Activation Strategy 2015-20 as evidenced by continued growth and success of the cruise sector in the Northern Territory. To better understand the drivers of this success, this Strategy proposes to closely monitor and report on each of the strategies against agreed performance targets.

The cruise industry is highly competitive and operates on a global scale. Therefore, maintaining clear lines of communication and collaborating with the industry is imperative to ensuring the ongoing success and viability of the industry to the Northern Territory.

Finally, given the evolving demands of the cruise industry, and opacity of the industry to outsiders, ongoing communication with all regional and local stakeholders is critical to ensuring the Northern Territory provides a targeted and cohesive approach.



**Florence Falls, Litchfield National Park.**

## 8.3 PERFORMANCE MEASURES & TARGETS

The following table contains performance measures and targets to monitor the communication and collaboration strategies.

**Table 4. Communication and collaboration performance measures and targets**

Performance measure	Target	Data source
Key port navigational and berthing data is collected and published to the cruise industry	Annual update (if necessary)	Investigation/ Harbour Masters/ marine charts
Improved understanding of the drivers of growth in the cruise sector	Annual review of the key growth drivers from cruise lines	CLIA market reports
Strategic goals and actions are being achieved, consistent with this Strategy	On time delivery	Tourism NT
Regular meetings of Cruise Ship Working Group with documented and circulated minutes	Quarterly	Tourism NT

## 9 Actions and implementation

The Cruise Tourism Strategy 2022 - 2025 provides a roadmap to ensure cruise tourism continues to grow and support the Northern Territory's tourism aspirations.

Tourism NT will lead implementation of the Strategy, working closely and collaboratively with key stakeholders from cruise lines and related services, government, local tourism and retail associations and tour operators.

The actions outlined in this document will form the basis of operational plans for organisations involved in the Cruise Ship Working Group, and details will be incorporated in divisional plans of relevant Northern Territory Government agencies.

Monitoring and reporting on each of the broader strategies and associated actions, as well as performance measures should be undertaken on an annual basis, and will require input from the responsible lead, however will ultimately be collated and delivered by Tourism NT.



Boat cruise, Nitmiluk National Park.

## 9.1 Actions

Action items have been identified to support the Northern Territory cruise industry and deliver on the strategies identified under each of the Cruise Tourism Strategy 2022 - 2025's four strategic pillars of cruise ship attraction, onshore experience, infrastructure and operational support services and communication and collaboration.

A lead agency or body has been identified for each action item with some actions to be delivered in partnership across government and industry.

### 9.1.1 Cruise ship attraction

**Table 5. Cruise ship attraction action Items**

Strategy supported	Action	Lead	Partner	Timing*
All	Provide a single point of contact for engagement with the cruise industry.	Tourism NT	n/a	Ongoing
All	Proactively market the Northern Territory as a cruise destination through key channels: <ul style="list-style-type: none"> <li>attendance at key conferences (e.g. ACA Conference, CLIA 360, Sea Trade)</li> <li>targeted engagement with international and domestic cruise line operators to communicate the benefits and opportunities associated with cruising the Northern Territory</li> <li>proactively promote cruise sectoring and rail and cruise packages through travel distribution partners to increase demand to embark and disembark through Darwin to increase dispersal and length of stay.</li> </ul>	Tourism NT	Darwin Port	Ongoing
5.1.3, 5.1.4	Facilitate in-destination meetings with ground handlers and cruise lines.	Tourism NT	n/a	March 2023
All	Review collateral to support cruise line awareness of the Northern Territory, including: <ul style="list-style-type: none"> <li>port overview document</li> <li>shore excursion brochure</li> <li>CLIA agent training.</li> </ul>	Tourism NT	n/a	Annually
5.1.4	Establish and maintain a closer working relationship with neighbouring governments. This could include knowledge exchanges, and regular meetings with relevant stakeholders to share Asian insights.	DITT	CoD	October 2024
5.1.1	Determine visitor experience – locals need to be ready and prepared.	Tourism NT	Darwin Port	October
All	Public relations activity and publication of stories through media (e.g. Cruise Weekly).	Tourism NT	n/a	2022 Ongoing

\*Timings of actions are based on resumption of expedition ships from April 2022 and cruise ships from October 2022.



## 9.1.2 Onshore experience

Table 6. Onshore experience action items

Strategy supported	Action	Lead	Partner	Timing*
6.1.1, 6.1.2	Develop specialised local offerings (food, drink, arts, craft) to differentiate the Northern Territory.	Tourism NT	n/a	March 2023
All	Minimise anti-social behaviour impacts on cruise passengers.	NTG	CoD/ Larrakia Nation	October 2023
All	Facilitate city vibrancy and local community engagement with cruise ship visits (e.g. events in CBD to attract locals and visitors and timed to match cruise visits).	Activate Darwin	CoD	October 2022
6.1.2	Review and explore options for value adding transport services to increase connectivity between the port and Darwin city.	Tourism NT	Darwin Port	October 2024
6.1.2	Educate tour operators and conduct two industry workshops per annum.	Tourism NT	DEAL, TTE, Tourism operators	Ongoing
6.1.2	Elevate opportunities to promote local and authentic product for sale to cruise passengers.	Tourism NT	Darwin Port	October 2022
6.1.4	Enriching the product offering for shorter duration experiences, which are suitable for less than 8-9-hour stays and, ideally, leverage the natural, cultural and/ or historical attributes of the destination.	Tourism NT	DEAL, TTE, Tourism operators	March 2023
6.1.1, 6.1.2	Develop entertainment options, particularly Aboriginal based experiences that reflect the attributes and/ or history of the local area.	Aboriginal tourism operators	Tourism NT	March 2024
6.1.1	Articulate the unique selling points of multiple anchorages along the Arnhem Land coast including cultural experiences reflective of cultural backgrounds.	Tourism NT	DEAL	December 2022

\*Timings of actions are based on resumption of expedition ships from April 2022 and cruise ships from October 2022.



## 9.1.3 Infrastructure and operational support services

Table 7. Infrastructure and operational support services action items

Strategy supported	Action	Lead	Partner	Timing*
<b>Cruise industry</b>				
7.1.1	Progress existing business case for expanded berthing capacity to accommodate multiple and oasis class vessels at Fort Hill Wharf and/or investigate possible redevelopment of Stokes Hill Wharf.	Darwin Port	DWC	April 2023
7.1.1	Conduct a feasibility study for the redevelopment of Stokes Hill Wharf as an overflow facility for expedition ships.	DWC	n/a	April 2023
7.1.2	Monitor the developments of the Gunyarrara (Gove Port) Tourism Precinct, and advocate for developments consistent with the broader cruise strategy.	Tourism NT	DEAL	December 2022
7.1.3	Investigate the option of improved bunkering capabilities (e.g. bunker barge).	Darwin Port	n/a	January 2024
7.1.1, 7.1.2, 7.1.3	Monitor developments in the cruise industry (in relation to ship size capacity and product differentiation) as well as developments in the capability of other ports.	All	n/a	Ongoing
7.1.3	Investigate the possibility of installing shore power connections at Fort Hill Wharf, and what transmission impacts this may have on the power grid.	Darwin Port	DIPL	December 2022
<b>Cruise passengers</b>				
7.1.3	Continue to explore avenues to minimise the impact of adverse weather on tourists (rain and heat / humidity), through innovative walkways, shading and cooling mechanisms in Darwin. <sup>1</sup>	CoD and DIPL	n/a	October 2023
7.1.4	Increase the level of Northern Territory produce supplied for consumption on board cruise ships.	Tourism NT	DITT	March 2023

<sup>1</sup> This is currently being investigated as part of the Darwin City Deal's heat mitigation trials. There is also planned investment in Darwin's State Square which will create cool, shaded spaces with landscaping, water features, event facilities and a new art gallery.

\*Timings of actions are based on resumption of expedition ships from April 2022 and cruise ships from October 2022.



View from Darwin Esplanade to East Point

## 9.1.4 Communication and collaboration

Table 8. Communication and collaboration action items

Strategy supported	Action	Lead	Partner	Timing*
8.1.2, 8.1.3	Align the Cruise Ship Working Group with the goals of the updated action plan and ensure appropriate stakeholders are engaged and invited to attend.	Tourism NT	Working group	June 2022
All	Produce and table an annual brief on delivery and progress of this Strategy (2 to 3 page summary maximum).	Tourism NT	n/a	Annually
8.1.1, 8.1.3	Convene a cruise forum every 6 months (operators / industry).	Tourism NT	Cruise industry	Bi-annually
8.1.3	Convene quarterly Cruise Ship Working Group meetings and ensure appropriate stakeholders are included in the process. Review progress towards this Strategy.	Tourism NT	Working group	Quarterly
8.1.3, 8.1.4, 8.1.5	Develop and execute an engagement strategy for the cruise industry. This would include: <ul style="list-style-type: none"> <li>developing new contacts in the industry and fostering relationships</li> <li>assisting contacts to familiarise themselves with the Northern Territory product offering</li> <li>facilitating meetings between the cruise industry and local stakeholders.</li> </ul>	Tourism NT	n/a	March 2023
8.1.3	Maintain and strengthen existing relationships between key stakeholders (i.e. Darwin Port, Darwin Waterfront Corporation, City of Darwin and Tourism NT).	Working group		Ongoing
8.1.5	Conduct a review of existing cruise ship tourism infrastructure throughout the Northern Territory. This information will feed into the Port brochure document.	Tourism NT		April 2024

\*Timings of actions are based on resumption of expedition ships from April 2022 and cruise ships from October 2022.

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# List of acronyms



<b>CLIA</b>	Cruise Line International Association
<b>CoD</b>	City of Darwin
<b>CSWG</b>	Cruise Ship Working Group
<b>DCM&amp;C</b>	Department of Chief Minister
<b>DEAL</b>	Developing East Arnhem Limited
<b>DIPL</b>	NT Department of Infrastructure Planning and Logistics
<b>DITT</b>	NT Department of Industry, Tourism and Trade
<b>DP</b>	Darwin Port
<b>DWC</b>	Darwin Waterfront Corporation
<b>NTG</b>	Northern Territory Government
<b>TTE</b>	Tourism Top End

# Glossary



## Ship visit

A ship visit to a port or destination where passengers go ashore.

## Expedition ship

Capacity of <200. Note: CLIA sources refer to expedition ships with a capacity of <100.

## Home port (also referred as turnaround)

A port where a ship decides to terminate their cruise and new passengers commence.

## Transit passenger days

A ship visit where passengers go ashore and return back to the vessel.

## Turnaround passenger days

The amount of days spent in the region once passengers disembark a terminated ship.

## Sectoring passengers

Passenger visits that are contributed to specific trade marketing campaigns.



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