



# Northern Territory's Tourism Industry Strategy 2030



**Annual Report Card**  
2022-23



**NORTHERN  
TERRITORY**  
TOURISM NT

# 2030 Targets

## Tourism 2030

This is the fourth progress report on the Northern Territory's (NT) Tourism Industry Strategy 2030 (Strategy). It provides an annual update on the progress against the Strategy targets, actions and priorities.

The initial targets were set for the Strategy in 2019. Since the release of the Strategy, COVID-19 hit the sector, resulting in unprecedented impacts on the global travel industry and across the NT tourism sector. Almost four years later, operating conditions for the tourism industry are well underway to recover and the changed market environment offers new opportunities for the NT tourism sector.

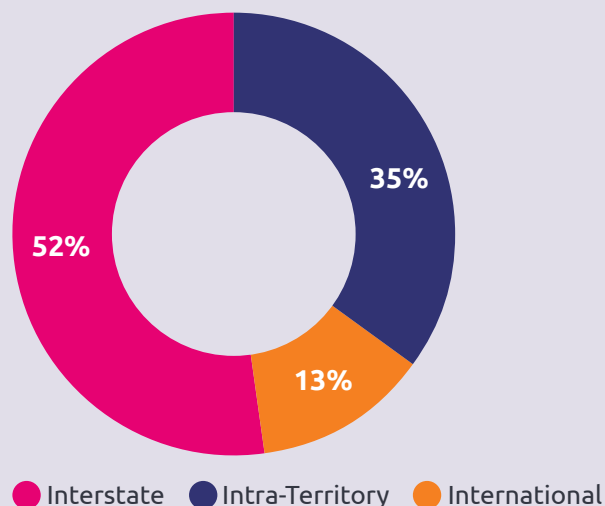
The 2030 targets of the Strategy were reviewed in early 2023 with consideration given to changes in the operating environment, macroeconomic factors, the impacts of COVID-19 and the ongoing recovery of the tourism sector. This report card reflects these updated targets published in September 2023 in the NT's Tourism Industry Strategy 2030 Update.

## Target measurements

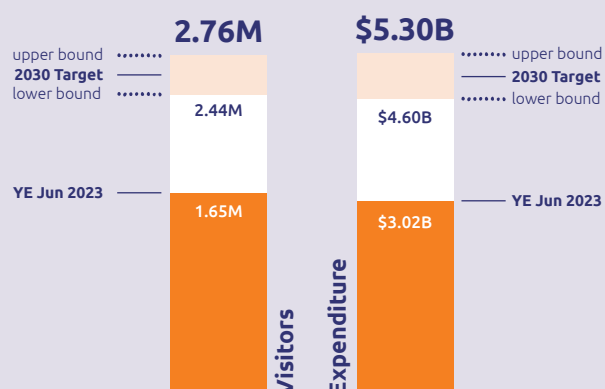
Growth in the tourism industry is measured several ways; for example, by counting visitor nights, visitor numbers and visitor spend. Fundamentally, growth is driven by increases in tourism expenditure. Higher levels of tourism expenditure in the NT translates to income for businesses and jobs for workers, as well as a wide range of benefits for the broader community – including supporting investment in new infrastructure and enhancing liveability through new experiences and events.

Holiday visitors and spend are highlighted separately due to the agency's ability to influence visitation through its programs and the critical importance of these visitors to the tourism sector.

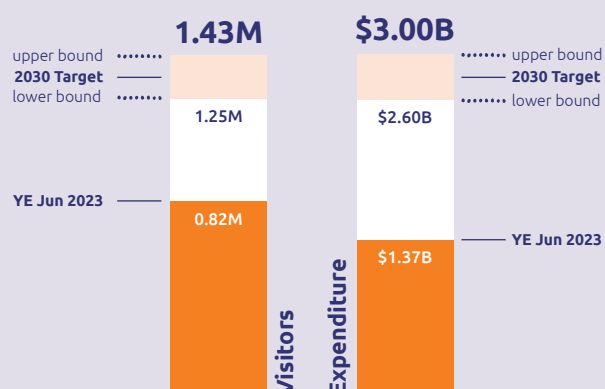
## Holiday visitation split by source Year ending June 2023



## Total visitor\* targets



## Total holiday targets



Source: International Visitor Survey and National Visitor Survey, Tourism Research Australia, Year Ending June 2023.

\*Total visitor group includes all incoming overnight visitors to the NT.



## Achieving the Strategy targets

The NT Government has a vision to deliver a \$40 billion economy by 2030 with a target of 50% renewables by 2030 and net zero emissions by 2050. Tourism has been identified as a priority industry, critical to growing the economy, attracting private investment, creating jobs and contributing to the Government's sustainability agenda.

The Strategy sets out targets for visitor arrivals and spend; the total overnight visitor arrivals to the NT are projected to reach between 2.44 million and 2.76 million by 2030, accounting for between \$4.6 billion and \$5.3 billion in expenditure. In terms of holiday visitors, targets are for between 1.25 million and 1.43 million holiday visitors by 2030, and \$2.6 billion to \$3.0 billion in holiday visitor expenditure.

Across the current phase of the Strategy (2023-2026), the visitor target forecast shows an annual growth rate of 6.4%, reflecting a moderation in the growth of domestic visitors offset by the continuing recovery of international source markets to 2025. In the final phase of the Strategy, between 2027 and 2030, the forecast shows visitors increasing on average 5.5% annually as the visitor economy returns to a steady state and the Strategy actions take effect.

Under the target scenario, visitor expenditure would grow on average 7.4% annually from 2025-2027, given the impact of the recovering international market and would then grow on average 8.2% per annum from 2027-2030.

## Looking to the future

Despite the pandemic setbacks, there have been significant achievements since the launch of the Strategy, with new products and experiences developed, funding secured for major tourism infrastructure enabling projects and upgrades in the Territory's national parks.

Acknowledging the progress to date from working collectively, the update of the Strategy considers changes in the operating environment and consumer landscape. It identifies three critical themes for the upcoming phase of the Strategy – resolving aviation access issues, reducing seasonality and a recommitment to sustainable tourism practices. A focus on these critical themes embedded within the strategic framework will drive continued efforts across the public and private sectors to support the sustainable growth ambitions of the tourism sector.

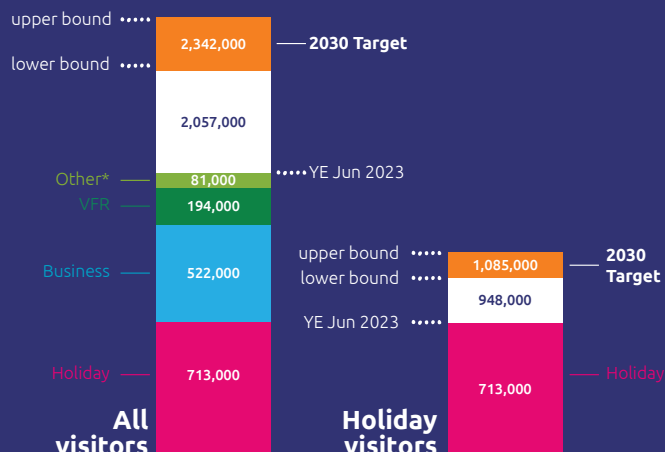
The successful implementation of the Strategy could see total visitation to the NT reach 2.8 million by 2030, with an associated visitor spend of \$5.3 billion. This ambitious target can only be achieved with industry and government working closely together to realise the opportunities from planned investment and commitments to support the NT tourism industry.



# Current visitor data snapshot

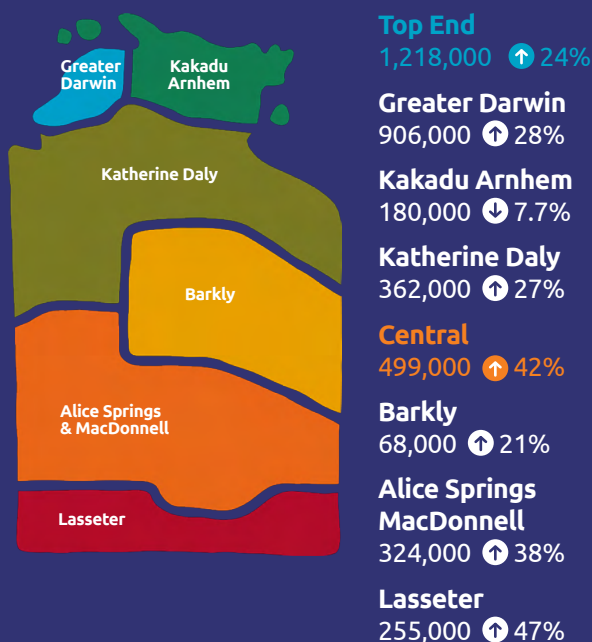


## Domestic overnight visitors by type (towards target)



\*Other includes employment, education and other visitors for stopover reasons.

## Total visitors by region



## Regional recovery

Recovery in visitation has been strong across the NT. The Top End overall experienced visitation recovery during 2022-23, with Greater Darwin and Katherine Daly recording increases in visitation and Kakadu Arnhem showing a minor decline. Central Australia also experienced growth in overall visitor numbers, including increases in visitation for the Barkly, Alice Springs MacDonnell and Lasseter regions. While the return in aviation capacity has been slow and some key aviation routes have been operating at lower capacity, this has gradually improved and will continue following the introduction of the Territory Aviation Attraction Scheme (TAAS) to boost additional aviation capacity into the NT. Additionally, there were 8.3% more self-drive tourists visiting the NT in 2022-23 compared to the previous year.

## Top 5 Interstate Markets





# Achieving priority objectives



Marketing



Industry development



Workforce development



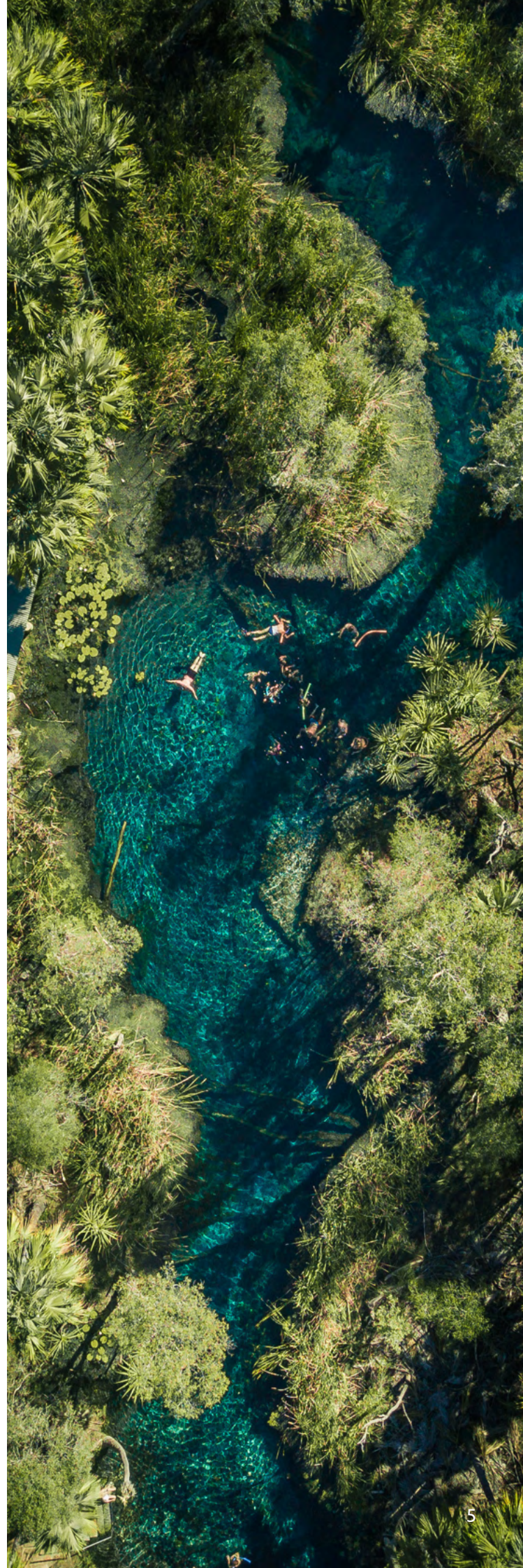
Collaboration across industry and government

The NT's Tourism Industry Strategy 2030 strategic framework is designed to unite efforts across the public and private sectors, with priorities and actions targeted towards shifting the current performance of the tourism sector in the NT to one of sustainable growth. The strategic framework incorporates six priority objectives that, if delivered, will make a material impact on the trajectory of tourism in the NT. The following is a summary (not exhaustive) of actions taken towards achieving the targets in 2022-23.

## Grow investment in the Northern Territory's remarkable assets, product and regions

- \$1.77 million was awarded to 25 Territory businesses through round 6 of the Visitor Experience Enhancement Program (VEEP), enabling tourism businesses to undertake projects that will enhance the visitor experience through upgrades or improvements.
- A total of 17 remote roadhouses, wayside inns and caravan parks across the NT were collectively awarded \$2 million to upgrade their facilities through the Roadhouse to Recovery round 3 grant with the aim of improving the visitor experience and regional dispersal.
- Additional grant programs to support NT tourism businesses and local government with their operations, including the Tourism Accessibility Improvement grant program, the Sustainability for Tourism grant program, the Tourism Evening Experiences Development Support program round 2 and the Tourism Town Asset program round 2.
- The NT Learning Adventures program including the Save and Learn package was increased to \$3,000 per eligible school group for the 2023 calendar year, with 74 school groups accessing funding in 2022-23 resulting in an average spend per excursion of \$97,741.
- The Tourism Business Development Program continued to be implemented in 2022-23, with 151 operators supported through the seven pillar framework and 12 industry initiatives delivered to support 94 operators.

- An accessible precinct pilot project was developed in partnership with Hospitality NT and Darwin Waterfront Corporation to promote accessible tourism experiences and develop an accessibility guide for the Darwin Waterfront precinct.
- To assist the NT tourism industry, 27 tourism businesses were supported to attend the Australian Tourism Exchange 2023 at the Gold Coast.
- To increase product distribution to international markets, NT operators were supported in completing the Australian Tourism Export Council's International Ready program.
- The National Aboriginal Art Gallery design progressed to community consultation with the construction tender earmarked for release in late 2023.
- Iris Capital received an exceptional development permit for the Lasseters Hotel Casino redevelopment over 9 stages in Alice Springs.
- A funding application for the Yulara Water Supply Project was submitted.
- Kakadu and Uluru-Kata Tjuta national parks received major Federal Government funding of \$355.1 million over 4 years.
- Critical infrastructure in the Territory's national parks was delivered including road upgrades and delivery of the final stages of the Litchfield National Park Central Valley development.
- Significant progress was made on catalyst Darwin projects, including redeveloping State Square, the new Waterfront Hotel, the Northern Territory Art Gallery and the Larrakia Cultural Centre.
- A parks pass system was introduced for interstate and international visitors to NT national parks and reserves in April 2023, with the income generated being invested into the protection, maintenance and safety of the parks, along with the creation of new visitor experiences.





## **Strengthen and showcase the Northern Territory's distinctive Aboriginal cultural tourism experiences**

- In 2022 the first-ever dedicated Aboriginal culture campaign in the Australian market was created in collaboration with the Aboriginal Tourism Committee (ATC). The campaign highlighted that 'Culture is closer than you think', successfully exceeding key performance indicators, raising awareness of the NT as the premier destination for Aboriginal tourism experiences and received a Mumbrella Award for Collaboration.
- The inaugural Aboriginal Tourism Forum was held in Darwin in November 2022, with 130 participants, over 50 per cent identifying as Aboriginal and 60 per cent rating the forum as valuable/ highly valuable.
- 16 Aboriginal majority-owned businesses and organisations received a total of \$746,100 in grant funding from round 5 of the Aboriginal Tourism Grant program and round 1 of the Aboriginal Development Support Grant program.
- In March 2023, the ATC led an NT delegation of more than 30 Aboriginal Traditional Owners and businesses to the World Indigenous Tourism Summit in Perth, attracting over 500 delegates from 21 countries including 9 Aboriginal tourism businesses from the NT.

- As a key player in guiding the implementation of the Northern Territory's Aboriginal Tourism Strategy 2020-2030, the ATC engaged in 8 meetings in 2022-23 with consultation and workshop sessions held throughout the year to advise on strategic policy and initiatives.
- To showcase the diversity of Aboriginal cultures in the NT, an events campaign was delivered promoting headline events including Parrtjima – A Festival in Light, the Barunga Festival and the Darwin Aboriginal Art Fair.

## **Through strategic marketing activities, grow the value of the holiday market in the Northern Territory**

- The 'Get Paid to do this!' working holiday maker campaign was developed to attract backpackers and working holiday visa holders to come to the NT and 'get paid' to work and live in paradise. The campaign went live on 1 March 2023 and exceeded expectations through the delivery of large numbers of backpackers (earlier than anticipated) for the season.
- The Summer starts early campaign was designed to drive visitation during the summer season, grow the visitor economy and drive demand to provide confidence to airlines and the NT tourism industry to keep operating during the summer months. The campaign over delivered in all key media metrics, was successfully boosting visitation during the low season and received a Mumbrella Travel Award for Best Use of Data.



- Developed an Alice Springs press office campaign aimed to boost the town's reputation through the sharing of positive stories, providing confidence to the travel trade and potential travellers that the Red Centre is a world-class travel destination for its natural landscapes, wildlife, Aboriginal culture, adventure experiences and unique events. Campaign outcomes included a significant reduction from 45 per cent to 28 per cent in negative social media sentiment for Alice Springs.
- A 'Seek different' marketing campaign was implemented in New Zealand. Domestic and New Zealand trade training and webinars were also conducted with travel agents upskilled on the NT's regions, latest travel insights and new product.
- A new global partnership was formed with Skyscanner, including a campaign focusing on 6 South East Asian markets (14 million consumers) and a campaign targeting consumers in Germany, the United Kingdom, Singapore and India (7 million consumers).
- A partnership with Tripadvisor continued in 2022-23, focusing on raising awareness and consideration of the NT as a destination.
- Key international trade events included the Australian Tourism Exchange (ATE) 2023 at the Gold Coast (31 NT operators attending), the Australian Tourism Export Council (ATEC) Meeting Place 2022 in Cairns (6 NT operators attending), and the Singapore mission in March 2023 (11 NT operators attending).
- Tourism NT trained over 7,200 travel trade on the NT, facilitated 18 international trade famils, supported 2 industry run famils, and hosted 8 influencer trips and 29 media famils.
- The Vivid campaign saw the beloved Sydney cultural event being 'hijacked' with cheeky print, social, out-of-home and projection site ad placements, generating mass awareness and positive sentiment for the NT.
- The Wintjiri Wiru campaign was developed in collaboration with Voyages Indigenous Tourism Australia to drive awareness and education around the new experience at Uluru. The campaign featured the choreographed drones and laser projections that illuminate the sky for an immersive cultural storytelling experience and highlighted the value of the Red Centre Light Trail, including Field of Light, the Light Towers and the Parrtjima festival.

## Leverage and build events to drive visitation

- The NT Major Events Company delivered the Million Dollar Fish event, offering anglers from across the country the opportunity to catch a barramundi worth a million dollars. Season 8 broke all records and was the biggest ever, with the most fish caught (20), the most registrations (47,949) and the most money paid out (\$230,000).
- The integrated events campaign promoted 'Events that bring the different'. The campaign successfully exceeded targets and raised awareness of the NT as a destination with events that are unique and 'Different in every sense'.
- Business events industry partners from Darwin, Kakadu and Alice Springs were supported to exhibit at the annual Asia-Pacific Incentives and Meetings Event (AIME) in Melbourne where they connected and engaged with key domestic and international business events planners.
- Following success in partnering with industry to secure the World Aquaculture Society Congress and World Community Development Conference, these two conferences were staged in mid-2023, welcomed almost 1,800 delegates and generated over \$6 million in delegate expenditure.
- In partnership with the local business events industry, 7 familiarisation programs were delivered across Darwin, Kakadu, Uluru and Alice Springs, welcoming over 60 business events planners to experience the NT for their future business events.
- Since launching in 2018, the NT Business Events Support Fund (NTBESF) has attracted 451 applications and committed over \$5.8 million to 161 confirmed business events, generating \$117 million in estimated delegate expenditure through to 2026.

## Develop ongoing access to and within the Northern Territory

- The Territory Aviation Attraction Scheme (TAAS) was designed to create a competitive position for the Territory in attracting new or incremental aviation services. A partnership between Tourism NT and Northern Territory airports, the program, which commenced from 1 July 2023, targets all of the Territory, including new flights to Darwin and incremental services to Alice Springs and Uluru.
- With the resumption of cruise shipping, 91 ships were welcomed to Darwin in 2022-23 carrying over 44,000 passengers to our port. Excitingly, this included 14 maiden voyages and was the largest volume of ships ever to visit Darwin.
- In August 2022, an airport and aviation roundtable was hosted for 40 delegates, with guest speakers from Bonza Airlines, Air New Zealand, Virgin Australia, Scoot, Qantas Freight, Toll and Tasman Cargo Airlines. This was an important event for networking and also allowed airline decision-makers to experience the NT's business and leisure infrastructure in person.
- Collaborative marketing campaigns with domestic and international airlines were successfully developed, promoting discounted airfares and driving visitation to the NT throughout the year. Initiatives with Singapore Airlines, Jetstar, Qantas and Virgin Australia positioned the NT as an attractive, easily accessible, affordable and on-trend destination, including during the low season.
- A cruise forum was held in Darwin focusing on enriching the onshore experience. The event brought cruise line ground handlers together with local stakeholders including tour operators, hospitality businesses and transport providers.



## **Governments, all industries and the general public recognise the value of tourism for the Northern Territory**

- The 2023 Tourism Towards 2030 conference was held in Alice Springs and Darwin, gathering 400 participants, the largest volume of registrations to date. The conference focus was on 'attracting the new travel consumer'.
- A Sustainable Tourism Action Plan was delivered to position the NT as a compelling destination for authentic sustainable travel and encourage the tourism industry to become a positive driver for sustainable development and conservation.
- 25 NT businesses were recognised at the 2022 Brolga NT Tourism Awards in Alice Springs. Char Restaurant and the Darwin Club was awarded the Chairman's Choice for Tourism Excellence, as well as the Tourism Restaurants and Catering Services Award.
- The NT's tourism industry was recognised nationally at the 2022 Qantas Australian Tourism Awards with 2 gold winners, 2 silver winners and 4 bronze winners.
- The NT's accessible tourism offering was enhanced through the delivery of an Accessible Tourism Plan, including a \$250,932 Tourism Accessibility Improvement Grant program.
- October Business Month (OBM) 2022 enabled Territorians to connect and network with other businesses, learn new things and develop new skills, and be inspired by the keynote speakers and Territory success stories. Over 2,800 people registered to attend 117 partner events, delivered by 48 partners.