

A man in a blue t-shirt and shorts carries a woman in a yellow tank top on his shoulders. They are walking away on a dirt path through a grassy field towards large, reddish-brown rock formations under a clear blue sky. A hat is seen floating in the air above them.

# International 2022 – 2023 Snapshot

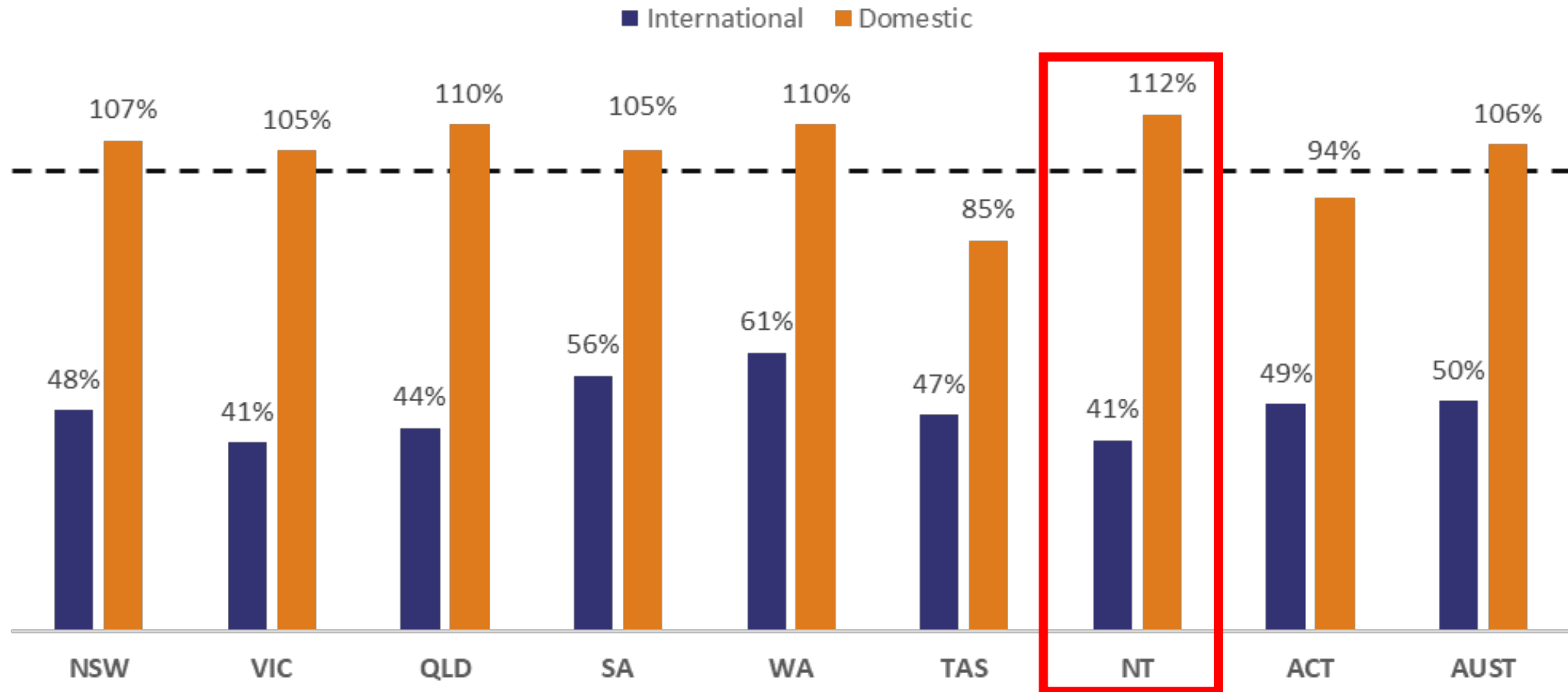
Tony Quarmby  
Executive Director, Marketing

Uluru-Kata Tjuta National Park

*Different in every sense*

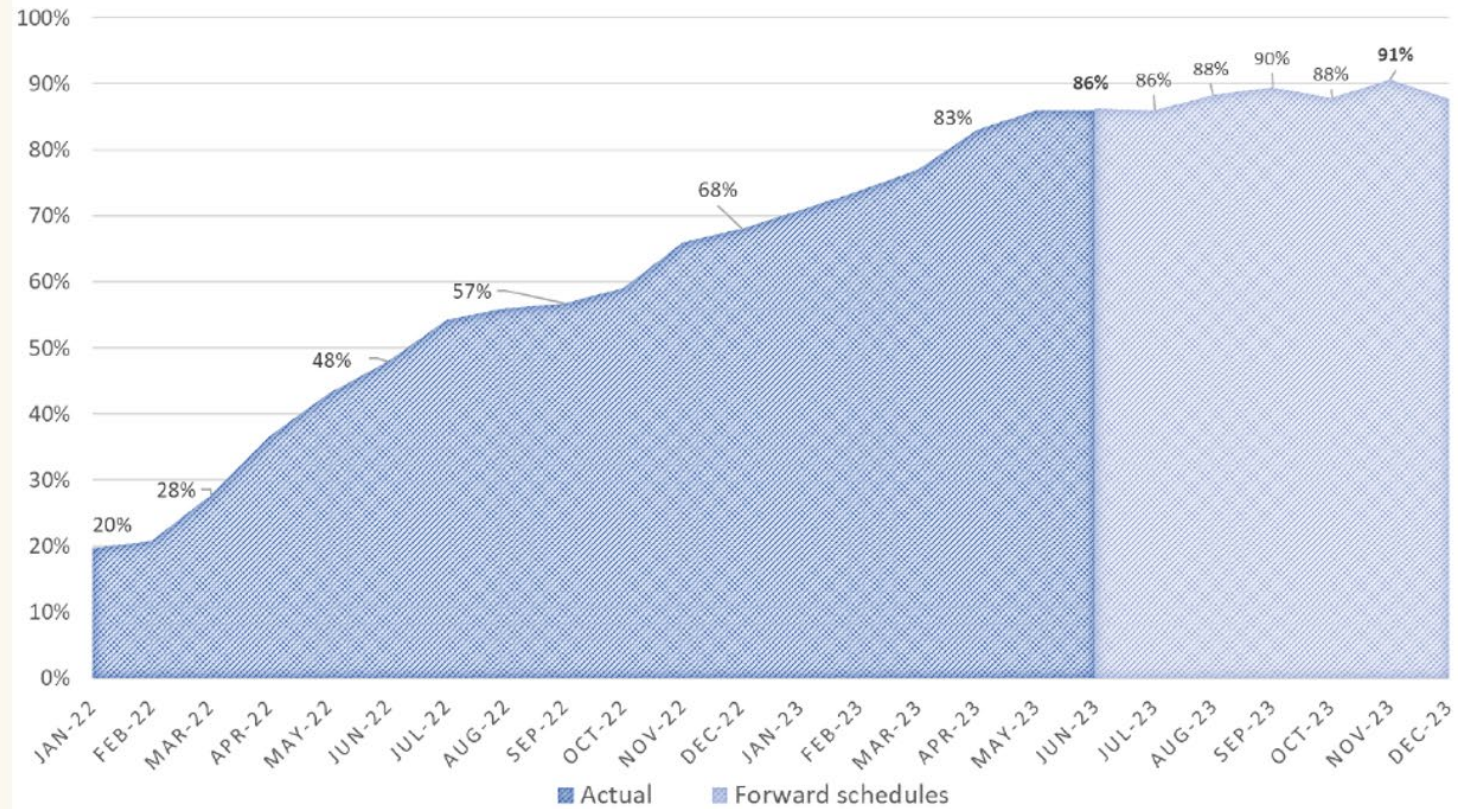


## Holiday Visitation Recovery



**INTERNATIONAL AVIATION CAPACITY INTO AUSTRALIA HAS RETURNED TO 86% OF PRE-COVID LEVELS IN JUN-23, REACHING 91% BY NOV-23**

**% OF INBOUND SEATS RETURNING TO AUSTRALIA**  
(COMPARED TO SAME MONTH IN 2019)  
SOURCE: CIRIUM SRS ANALYSER



Source: Cirium SRS Analyser air schedules data, June 2023

# \$339 MILLION

## VISITOR EXPENDITURE YE JUNE 2023 FROM 150,000 INTERNATIONAL VISITORS

TOTAL VISITORS



**150,000**  
YE JUN 2023

**294,000**  
YE JUN 2019

AVERAGE NIGHTS



**23.9**  
YE JUN 2023

**11.0**  
YE JUN 2019

AVERAGE SPEND  
PER TRIP



**\$2,261**  
YE JUN 2023

**\$1,545**  
YE JUN 2019

### PURPOSE OF VISIT YE JUNE 2023

HOLIDAY



**104,000**  
-59%

VISITING  
FRIENDS AND  
RELATIVES



**16,000**  
-1.5%

BUSINESS



**10,000**  
+2.7%

OTHER\*



**25,000**  
-0.3%

| INTERNATIONAL VISITOR<br>NORTHERN TERRITORY SUMMARY<br>YEAR ENDING JUNE | Visitors |       | Change on<br>2019 | Holiday |       | Change on<br>2019 |
|---|----------|-------|-------------------|---------|-------|-------------------|
|   | 2019     | 2023  |                   | 2019    | 2023  |                   |
| Visitors ('000)   | 294      | 150   | -49%              | 251     | 104   | -59%              |
| Visitor nights ('000)   | 3,222    | 3,587 | 11%               | 1,857   | 1,045 | -44%              |
| Expenditure (\$ million)  | 454      | 339   | -25%              | 362     | 141   | -61%              |
| Average length of stay (nights)   | 11.0     | 23.9  | 12.9              | 7.4     | 10.0  | 2.6               |
| Average spend per trip (\$)   | 1,545    | 2,261 | 46%               | 1,439   | 1,352 | -6.1%             |
| Visitor market share (%)  | 3.4      | 2.8   | -0.6pp            | 5.4     | 4.5   | -0.9pp            |

## INTERNATIONAL VISITOR SOURCE MARKETS



### UNITED STATES OF AMERICA

VISITORS 26,000 ↓  
EXPENDITURE \$45M



### UNITED KINGDOM

VISITORS 18,000 ↓  
EXPENDITURE \$31M



### GERMANY

VISITORS 12,000 ↓  
EXPENDITURE \$16M



### FRANCE

VISITORS 10,000 ↓  
EXPENDITURE \$14M



### INDIA

VISITORS 9,000 ↑  
EXPENDITURE \$7M



### NEW ZEALAND

VISITORS 8,000 ↓  
EXPENDITURE \$14M



### NETHERLANDS

VISITORS 4,500 ↓  
EXPENDITURE \$9M



### SWITZERLAND

VISITORS 4,400 ↓  
EXPENDITURE \$13M



### JAPAN

VISITORS 4,300 ↓  
EXPENDITURE \$4M



### CANADA

VISITORS 4,000 ↓  
EXPENDITURE \$3M

# Top End

| INTERNATIONAL VISITOR<br>TOP END<br>YEAR ENDING JUNE | Visitors |       | Change on<br>2019 | Holiday |       | Change on<br>2019 |
|--|----------|-------|-------------------|---------|-------|-------------------|
|  | 2019     | 2023  |                   | 2019    | 2023  |                   |
| Visitors ('000)                                      | 134      | 88    | -35%              | 96      | 45    | -53%              |
| Visitor nights ('000)                                | 2,125    | 2,793 | 31%               | 1,047   | 730   | -30%              |
| Expenditure (\$ million)                             | 172      | 272   | 58%               | 105     | 89    | -15%              |
| Average length of stay (nights)                      | 15.8     | 31.9  | 16.1              | 10.9    | 16.2  | 5.3               |
| Average spend per trip (\$)                          | 1,279    | 3,105 | 143%              | 1,096   | 1,985 | 81%               |
| Visitor market share (%)                             | 1.6      | 1.6   | 0pp               | 2.1     | 1.9   | -0.2pp            |
| Visitor market share of the NT (%)                   | 45.6     | 58.4  | 12.8pp            | 38.1    | 43.1  | 5.0pp             |

# Central Australia

| INTERNATIONAL VISITOR<br>CENTRAL AUSTRALIA<br>YEAR ENDING JUNE | Visitors |      | Change on<br>2019 | Holiday |      | Change on<br>2019 | Change<br>compared to<br>Top End |
|--|----------|------|-------------------|---------|------|-------------------|----------------------------------|
|  | 2019     | 2023 |                   | 2019    | 2023 |                   |                                  |
| Visitors ('000)  | 203      | 76   | -63%              | 198     | 70   | -65%              | -12%                             |
| Visitor nights ('000)  | 1,078    | 788  | -27%              | 808     | 315  | -61%              | -31%                             |
| Expenditure (\$ million)                                       | 281      | 67   | -76%              | 255     | 52   | -80%              | -65%                             |
| Average length of stay (nights)                                | 5.3      | 10.4 | 5.1               | 4.1     | 4.5  | 0.4               | -4.9%                            |
| Average spend per trip (\$)                                    | 1,383    | 880  | -36%              | 1,284   | 733  | -43%              | -124%                            |
| Visitor market share (%)                                       | 2.4      | 1.4  | -1pp              | 4.2     | 3.0  | -1.2pp            | -1pp                             |
| Visitor market share of the NT (%)                             | 69.0     | 50.6 | -18.4pp           | 78.9    | 67.4 | -11.5pp           | -16.5pp                          |

# CONSUMER DEMAND PROJECT GLOBAL REPORT

AUGUST 2023





# Travel factor importance

## Importance Factors

(% rank factor in top 5)

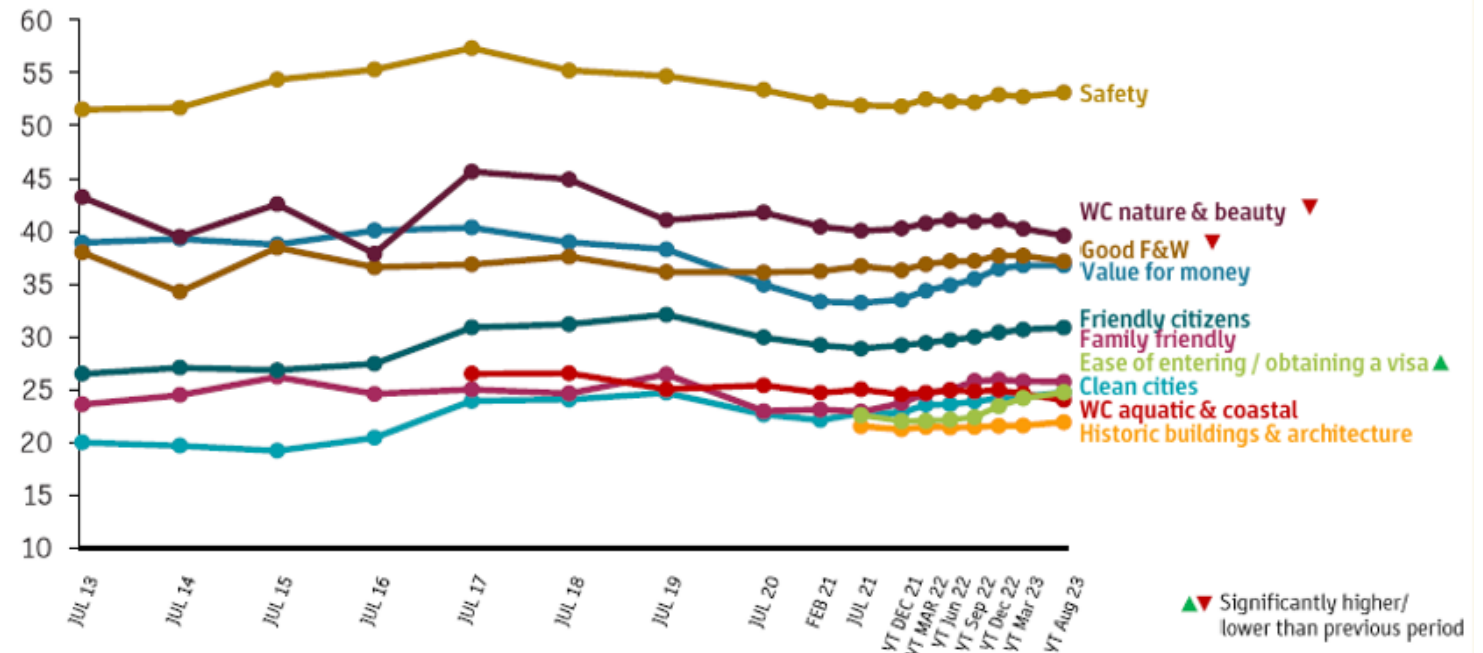
Global aggregate - YT August 2023



## Importance Factors

(% rank factor in top 5)

Global aggregate



# Barriers

## Barriers to intending Aus (Top 15)

% of Global aggregate not intending to visit Australia August 2023

## Top 15 barriers by market (%)

Top 1 ■ Top 5 ■

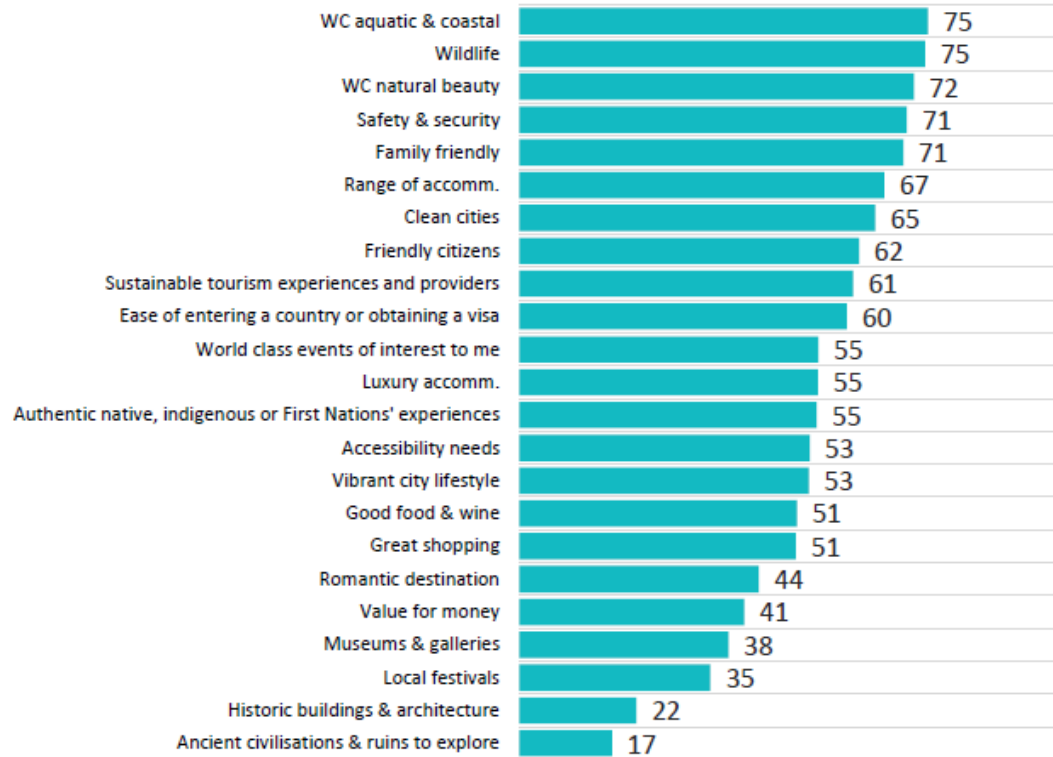
|   |    | INDO | NZ | SING | MALAY | KOR | JAP | CHINA | INDIA | GER | USA | UK | HK | FRA | CAN |
|---|----|------|----|------|-------|-----|-----|-------|-------|-----|-----|----|----|-----|-----|
| Expensive airfares  | 23 | 14   | 16 | 23   | 27    | 19  | 18  | 9     | 20    | 38  | 27  | 36 | 25 | 39  | 39  |
| I'd prefer to/ have planned to travel to other places                       | 21 | 26   | 28 | 25   | 20    | 22  | 21  | 15    | 19    | 20  | 24  | 19 | 18 | 17  | 23  |
| High cost of travelling around  | 20 | 16   | 16 | 22   | 33    | 24  | 15  | 8     | 19    | 23  | 21  | 23 | 22 | 10  | 28  |
| It is too far to travel   | 19 | 6    | 1  | 9    | 11    | 22  | 12  | 13    | 14    | 42  | 26  | 39 | 18 | 30  | 33  |
| High cost of living expenses  | 15 | 16   | 15 | 18   | 29    | 16  | 11  | 9     | 17    | 13  | 9   | 16 | 15 | 13  | 17  |
| The current financial/economic situation is not favourable                  | 12 | 16   | 13 | 10   | 25    | 12  | 3   | 10    | 11    | 15  | 9   | 14 | 11 | 10  | 12  |
| Covid-19 related factors  | 12 | 16   | 7  | 12   | 21    | 10  | 9   | 17    | 21    | 9   | 11  | 7  | 10 | 11  | 8   |
| I don't have enough annual leave  | 12 | 11   | 9  | 14   | 12    | 14  | 16  | 15    | 11    | 11  | 8   | 10 | 17 | 7   | 10  |
| It is easy to put off for another time                                      | 11 | 9    | 17 | 12   | 10    | 16  | 9   | 6     | 13    | 9   | 11  | 7  | 13 | 7   | 9   |
| I don't know enough about what to do there                                  | 10 | 14   | 4  | 10   | 16    | 8   | 11  | 9     | 11    | 7   | 13  | 7  | 13 | 9   | 10  |
| The Australian dollar makes it too expensive to holiday there               | 10 | 10   | 5  | 8    | 27    | 10  | 12  | 8     | 13    | 5   | 4   | 7  | 9  | 9   | 7   |
| I have already travelled there and now want to see other places             | 10 | 8    | 21 | 18   | 9     | 8   | 12  | 7     | 11    | 4   | 7   | 8  | 9  | 6   | 5   |
| I don't know anyone who lives there   | 9  | 14   | 4  | 6    | 14    | 8   | 5   | 11    | 9     | 13  | 10  | 8  | 7  | 9   | 10  |
| It is too hard to plan  | 9  | 5    | 3  | 8    | 10    | 8   | 8   | 12    | 11    | 9   | 9   | 7  | 12 | 7   | 6   |
| I am worried about dangerous animals in Australia e.g. snakes, spiders, etc | 9  | 10   | 8  | 6    | 7     | 10  | 3   | 11    | 8     | 13  | 9   | 12 | 5  | 11  | 11  |
| I am concerned about the Australian climate e.g. bushfires, temperature     | 8  | 11   | 6  | 8    | 9     | 8   | 5   | 13    | 11    | 7   | 6   | 9  | 7  | 10  | 6   |
| Political relations between Australia and my country are not favourable     | 4  | 6    | 1  | 2    | 3     | 3   | 1   | 12    | 6     | 2   | 4   | 3  | 5  | 5   | 2   |

\*26<sup>th</sup> barrier overall

# What to highlight to new visitors

## Australia's Association – Visited Aus

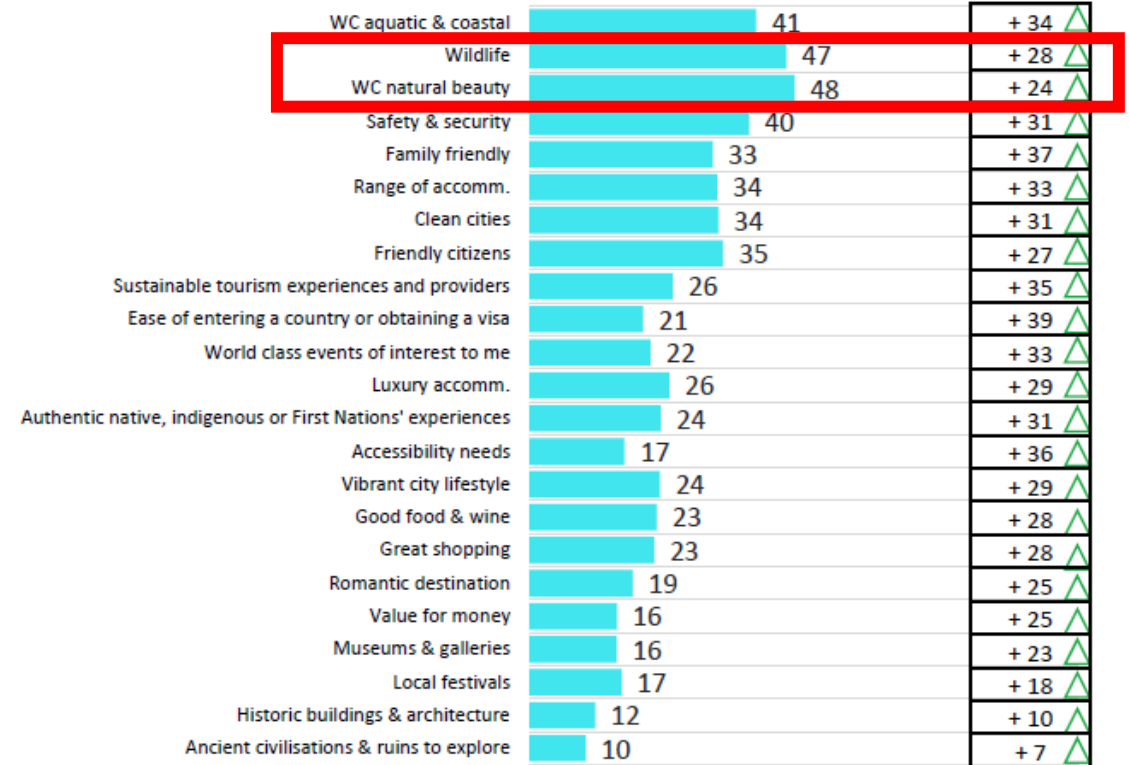
(% rank factor in top 5)  
Global aggregate – YT Aug 2023



## Australia's Association – Not Visited Aus

(% rank factor in top 5)  
Global aggregate – YT Aug 2023

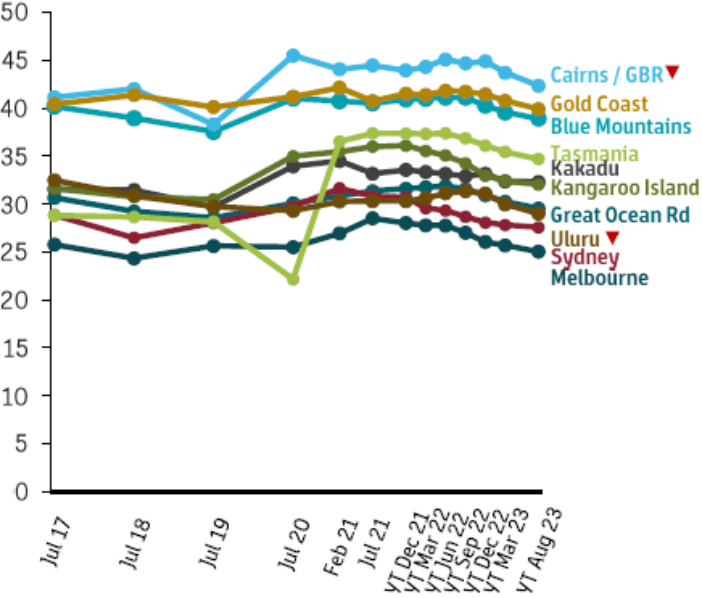
% difference post visitation



# NT recognised attributes

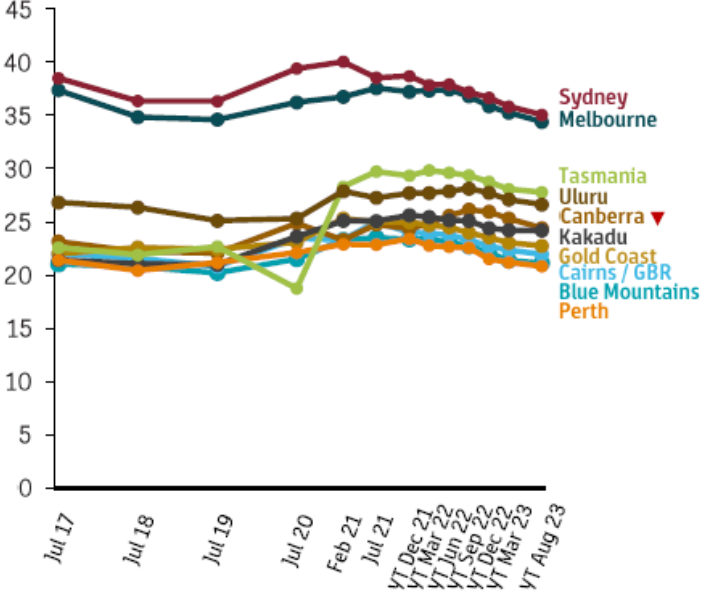
## Association with World Class Nature and Beauty

% of Aus considerers - Global aggregate  
Top 10



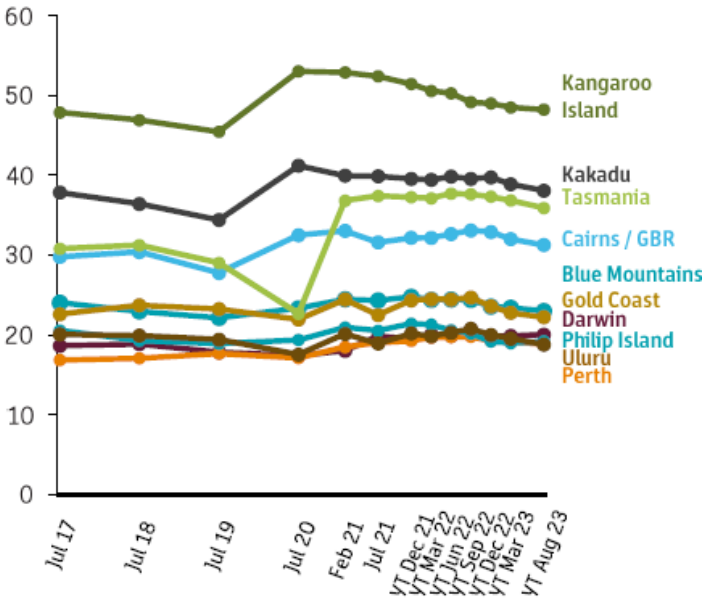
## Association with History & Heritage

% of Aus considerers - Global aggregate  
Top 10



## Association with Wildlife

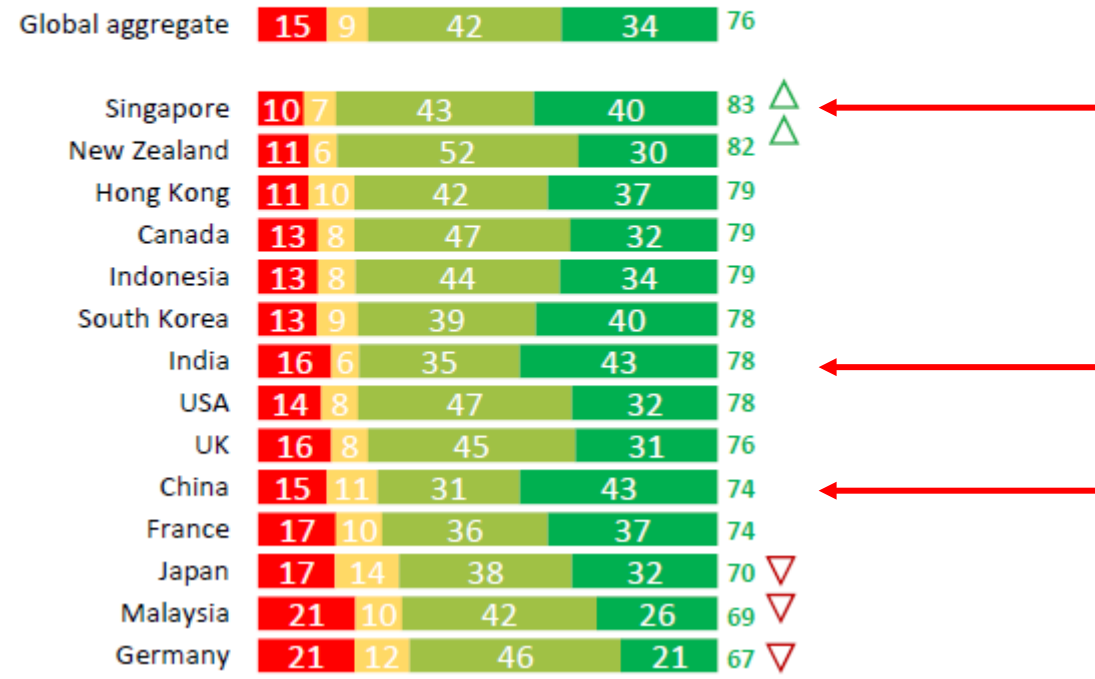
% of Aus considerers - Global aggregate  
Top 10



# Immediate opportunity markets (Australia)

## Longer haul international trip (beyond 4 hours flight)

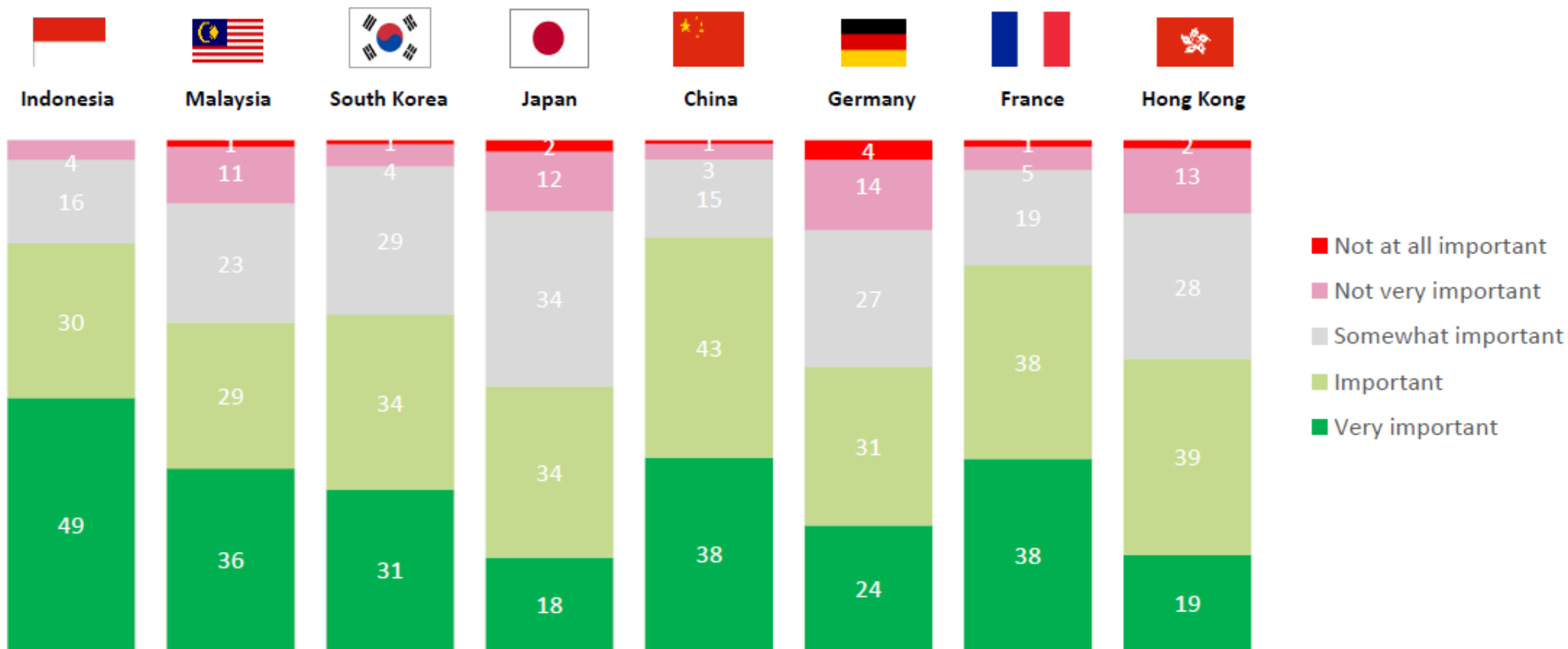
Aug 2023



■ Not comfortable  
 ■ Would consider  
 ■ Actively planning  
 ■ Not sure

# Importance of information provided in native language

% of respondents by market – August 2023



# Tourism Industry Strategy Update



**International visitor and expenditure target**  
 By 2030, the Northern Territory could welcome 413,000 international visitors under the Strategy target, with a total spend of \$1.1 billion.

This would reflect an increase of around 119,000 international visitor trips (for 40%) and \$0.6 billion in spend relative to pre-COVID levels in 2019.

Due to border closures and other factors including the slower reestablishment of aviation capacity, international visitation will take longer to recover following the pandemic, relative to domestic visitation. The recovery of international arrivals into the Northern Territory is targeted to continue over the near term in line with national recovery expectations, with total international trips reaching 59% of 2019 levels in 2022 and 93% in 2024.

International visitor spend (in nominal terms) is expected to recover more quickly than trips, reaching 85% of 2019 levels by 2023 – due in large part to the significant increase in the cost of travel since 2019.

In terms of growth post-recovery to pre-pandemic levels, the international visitor target reflects an annual growth rate in visitation of 4.7% from 2025 to 2027, with a lift to 6% average annual growth from 2027 to 2030 as key projects in the Strategy take hold and commence operation.

As with the domestic market, international spend is forecast to grow faster than visitation given CPI growth. From 2025 to 2027, spend would grow at 7.2% annually which would increase in the final period of the Strategy (2027 to 2030) to 8.5%.

The holiday market contributes the vast majority of international visitation to the NT. By 2030, the target is for 83% of total trips.

This level of holiday visitation in 2030 would result in \$0.8 billion in visitor spend, a significant increase of \$0.4 billion relative to 2019.



**Table 5.3: International visitor and spend totals to 2030**

| International visitor target (000)      | Visitors and spend |         | Recovery (% of 2019) |         | Compound annual growth rate (CAGR) |           |
|---|--------------------|---------|----------------------|---------|------------------------------------|-----------|
|   | 2018-19            | 2029-30 | 2022-23              | 2023-24 | 2025-2027                          | 2027-2030 |
| Total international                     | 294                | 413     | 59%                  | 93%     | 4.7%                               | 6.0%      |
| International holiday                   | 251                | 342     | 55%                  | 91%     | 4.7%                               | 6.0%      |
| International spend target (\$ billion) | 0.5                | 1.1     | 85%                  | 137%    | 7.2%                               | 8.5%      |
| Total international                     | 0.4                | 0.8     | 74%                  | 128%    | 7.2%                               | 8.5%      |
| International holiday                   | 0.4                | 0.8     | 74%                  | 128%    | 7.2%                               | 8.5%      |



### Chart 5.4 International visitor and spend targets to 2030

