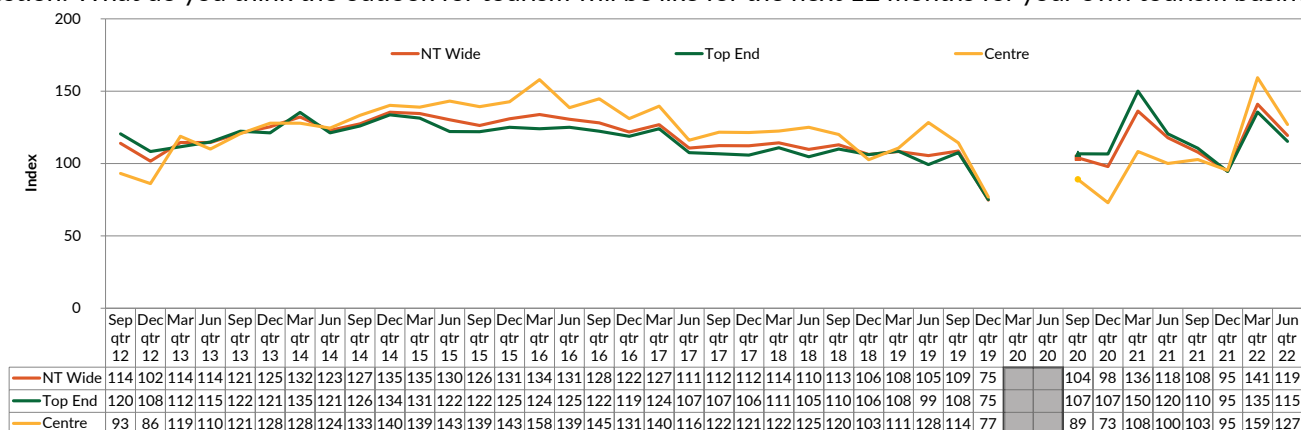


Tourism NT Industry Sentiment Poll June Quarter 2022

Industry Sentiment Poll: Business Outlook

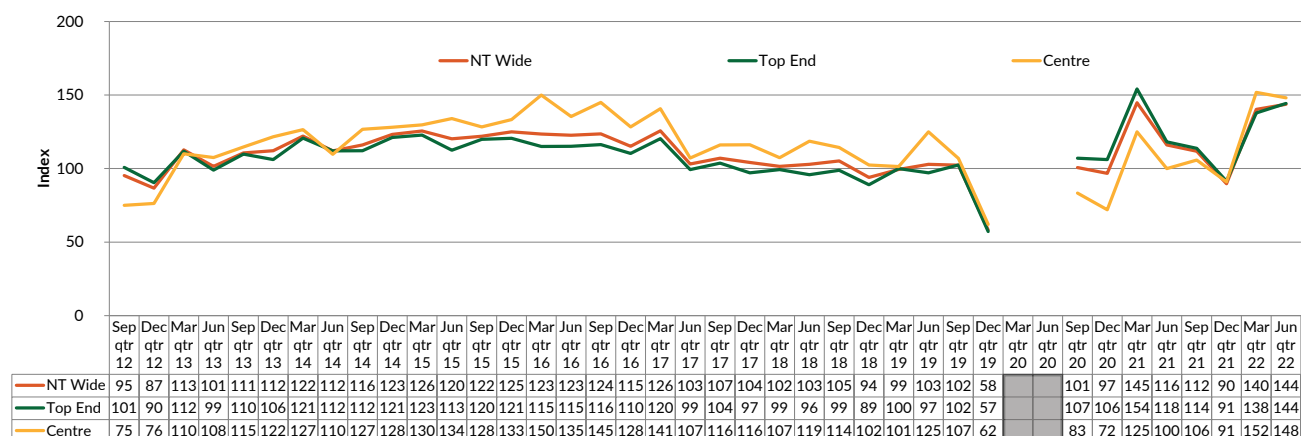
Question: What do you think the outlook for tourism will be like for the next 12 months for your own tourism business?



Note: Shaded section with no data relates to period where the sentiment poll was halted due to COVID-19.

Industry Sentiment Poll: Regional Outlook

Question: What do you think the outlook for tourism will be like for the next 12 months for your region?



Note: Shaded section with no data relates to period where the sentiment poll was halted due to COVID-19.

Operator sentiment across all regions in regards to their own business outlook was positive for the next 12 months. Sentiment across the NT is looking positive as Australia transitions away from the COVID-19 response measures. Operator outlook for the tourism region was similar to the assessment for their own business. This sentiment resonated with the Territory wide business confidence survey, with business confidence levels for the June quarter 2022 up 24 percentage points from March 2022, and close to the peak reached in the June quarter 2021.

Operators responding to the poll indicated they are continuing to experience staffing issues. These challenges included: staffing shortages (62%), having to limit operations due to staff shortages (51%), and staff retention (30%). These results resonate with the NT business confidence survey results for the June quarter 2022, where a lack of suitably skilled workers was a reason cited by Territory businesses that could hinder their business prospects over the next 12 months. The NT Budget 2022 has allocated \$1.3 million to attract and retain the tourism workforce. In the six months from 1 July 2021 to 31 December 2021, a total of 22,721 Working Holiday Maker (WHM) (subclass 417 and subclass 462) visas were granted, a 8.5 per cent increase from the same period in 2020. The Australian Government has announced that for 2022-23 only, there will be a 30 per cent increase to the number of places available to WHM from countries with which Australia has a capped Work and Holiday (subclass 462) visa arrangement. This one-off cap increase commenced from 1 July 2022.

Tourism NT Industry Sentiment Poll June Quarter 2022

BUSINESS OUTLOOK

- Darwin and Surrounds (116ix)
- Katherine (105ix)
- Kakadu Arnhem (130ix)
- Barkly/Tablelands (no data)
- Alice Springs and Surrounds (130ix)
- Uluru and Surrounds (133ix)



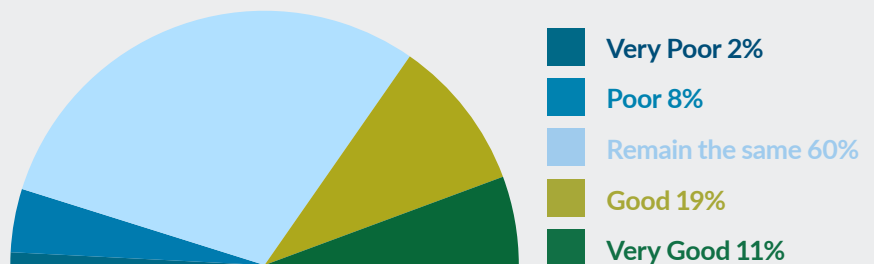
REGIONAL OUTLOOK

- Darwin and Surrounds (147ix)
- Katherine (115ix)
- Kakadu Arnhem (147ix)
- Barkly/Tablelands (no data)
- Alice Springs and Surrounds (144ix)
- Uluru and Surrounds (145ix)

TOP END BUSINESS OUTLOOK

115 IX*

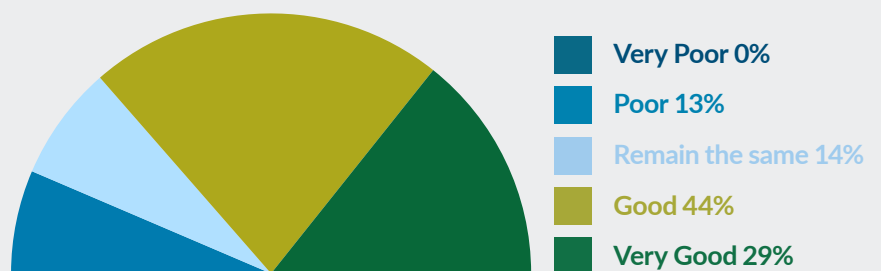
15 points above baseline n = 62



TOP END REGIONAL OUTLOOK

144 IX*

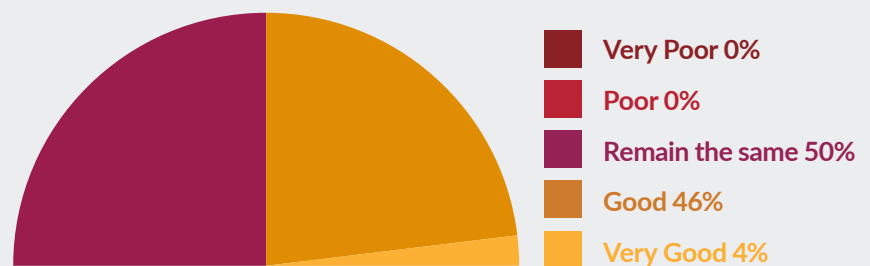
44 points above baseline n = 70



CENTRE BUSINESS OUTLOOK

127 IX*

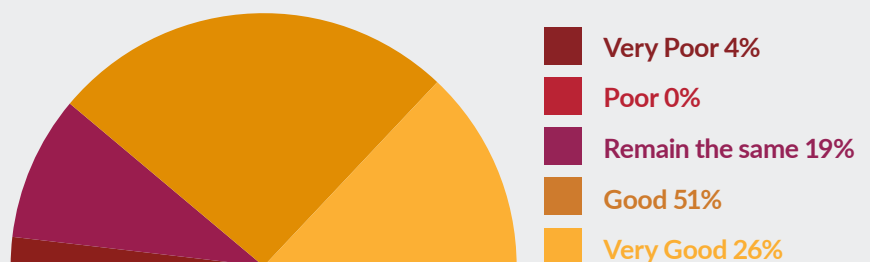
27 points above baseline n = 26



CENTRE REGIONAL OUTLOOK

148 IX*

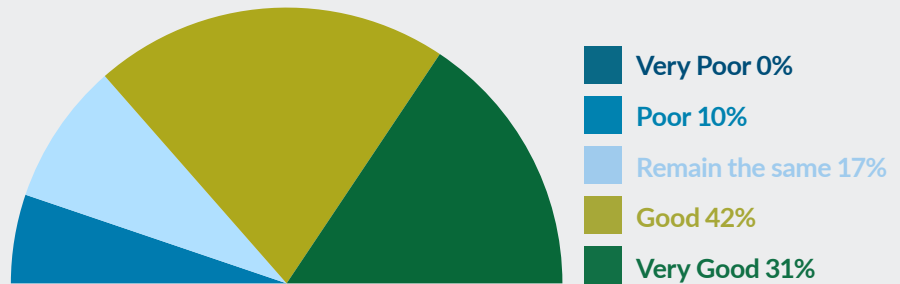
48 points above baseline n = 27



Tourism NT Industry Sentiment Poll June Quarter 2022

DARWIN AND SURROUNDS REGIONAL OUTLOOK INDEX*

147 IX*
n = 48

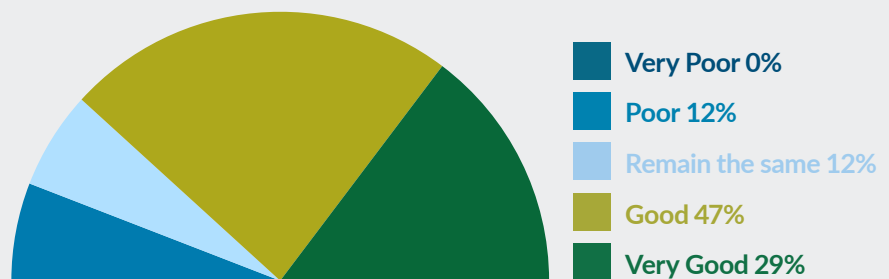


47 points above baseline

Operator outlook for the Darwin and Surrounds region was higher with over two thirds (73%) having a positive outlook for the next 12 months.

KAKADU ARNHEM REGIONAL OUTLOOK INDEX*

147 IX*
n = 17

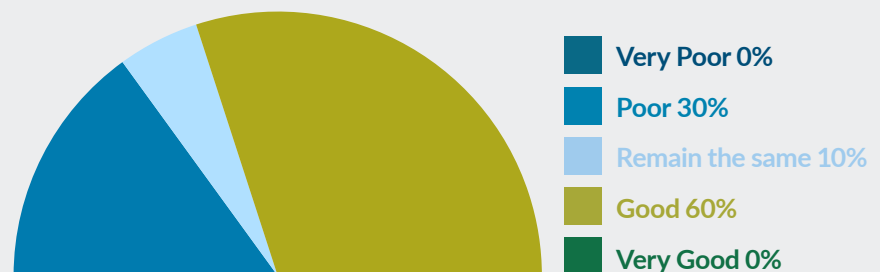


47 points above baseline

Operator outlook for the Kakadu Arnhem region was higher with over three quarters (76%) reporting a positive outlook for the next 12 month period.

KATHERINE AND SURROUNDS REGIONAL OUTLOOK INDEX*

115 IX*
n = 10

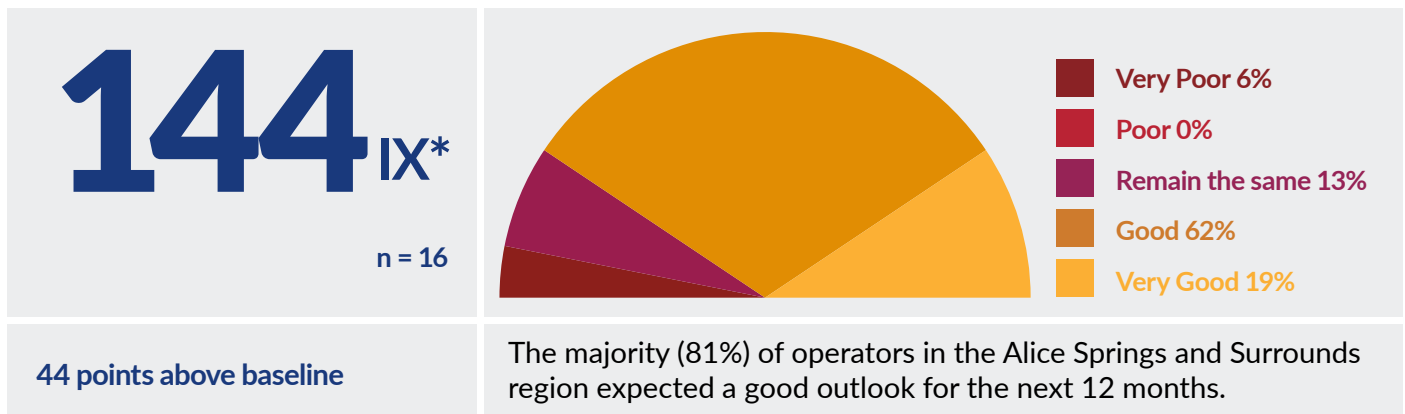


15 points above baseline

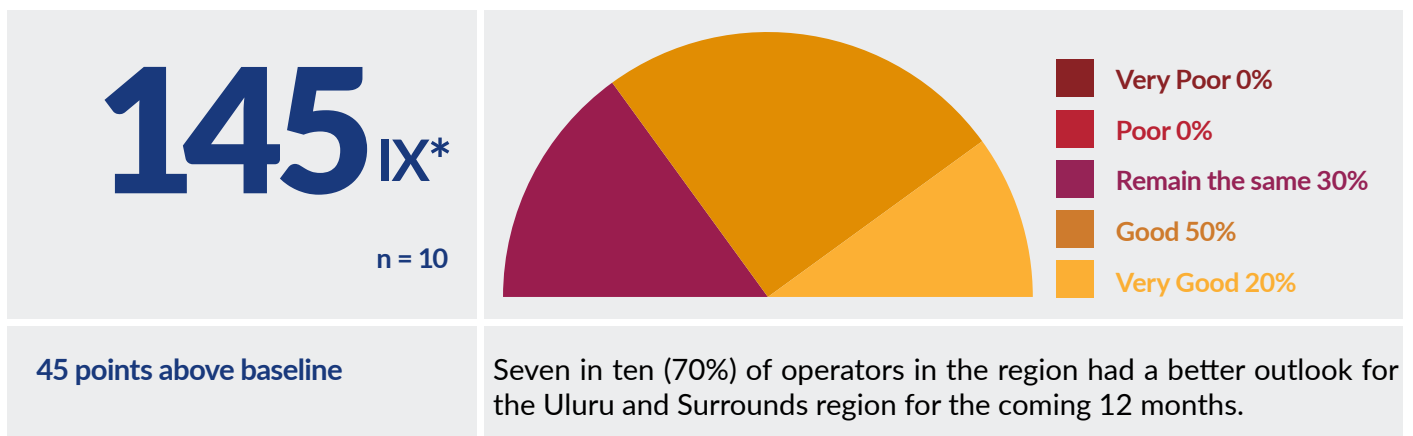
Over half (60%) of operators in the Katherine and Surrounds region had a positive outlook for the next 12 months.

Tourism NT Industry Sentiment Poll June Quarter 2022

ALICE SPRINGS AND SURROUNDS REGIONAL OUTLOOK INDEX*



ULURU AND SURROUNDS REGIONAL OUTLOOK INDEX*



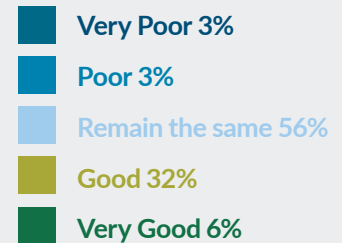
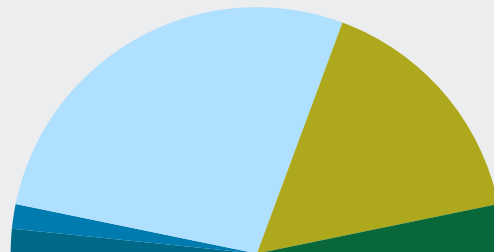
NOTE: Barkly/Tablelands regional outlook index has been removed, due to no operators from this region participating in the Industry Sentiment Poll for this quarter.

Tourism NT Industry Sentiment Poll June Quarter 2022

NT BUSINESS OUTLOOK BY SECTOR - Accommodation

118 IX*

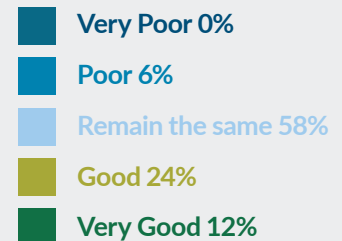
18 points above baseline n = 31



NT BUSINESS OUTLOOK BY SECTOR - Attractions

121 IX*

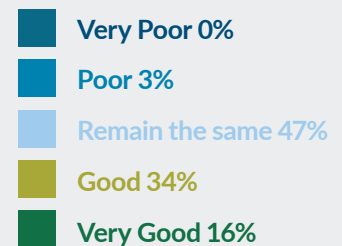
21 points above baseline n = 17



NT BUSINESS OUTLOOK BY SECTOR - Touring and Transport

132 IX*

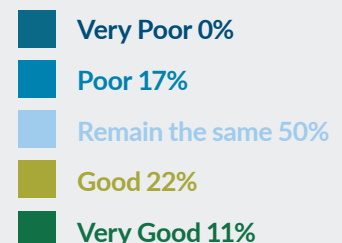
32 points above baseline n = 38



NT BUSINESS OUTLOOK BY SECTOR - All other Sectors

114 IX*

14 points above baseline n = 18



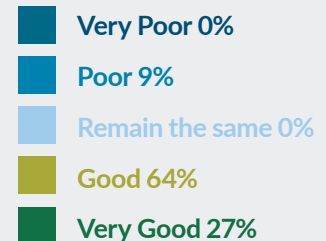
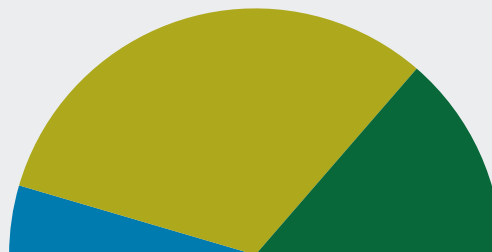
Tourism NT Industry Sentiment Poll June Quarter 2022

NT REGION OUTLOOK - Aboriginal Tourism Business

155

IX*

55 points above baseline n = 11

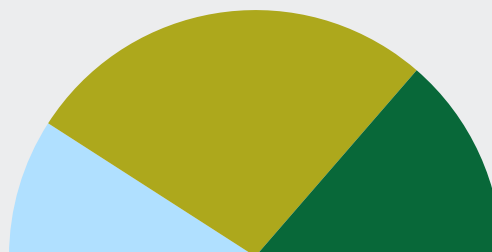


NT BUSINESS OUTLOOK - Aboriginal Tourism Business

155

IX*

55 points above baseline n = 11



Operator sentiment for Aboriginal tourism businesses in regards to own business outlook and regional outlook was mostly positive.

Disclaimer: The Department of Industry, Tourism and Trade has taken due care in preparing this information, however does not warrant that it is correct, complete or suitable for the purposes for which it is intended to be used. The Department disclaims all liability associated with the use of this information. Tourism Research Australia estimated that there were 1,443 employing tourism businesses across the Northern Territory in 2020-21. Eight one operators participated in the Industry Sentiment Poll for the June quarter 2022. Results presented for the Top End region from the Industry Sentiment Poll are informed by a sample size of 70 tourism operators. Results presented for the Centre region from the Industry Sentiment Poll are informed by a sample size of 27 tourism operators. As such, these results are not representative of regional performance or a census of operator sentiment. Please also note operators can overlap between Top End and Centre regions. For more information, please contact the Research team on: research.tourismnt@nt.gov.au

***Using the Index measure:** Each Index measure is derived by assigning a value of 0 to a 'large decrease' response, 50 to 'decrease', 100 to 'same', 150 to 'increase' and 200 to a 'large increase'. An average value of 100 across operators therefore indicates performance is "on par with the previous year".

Notes:

a: Figures might not add up to 100% due to rounding.

b: Respondents may be operating in multiple sectors, therefore the sum of sectors will not add up to total respondents.