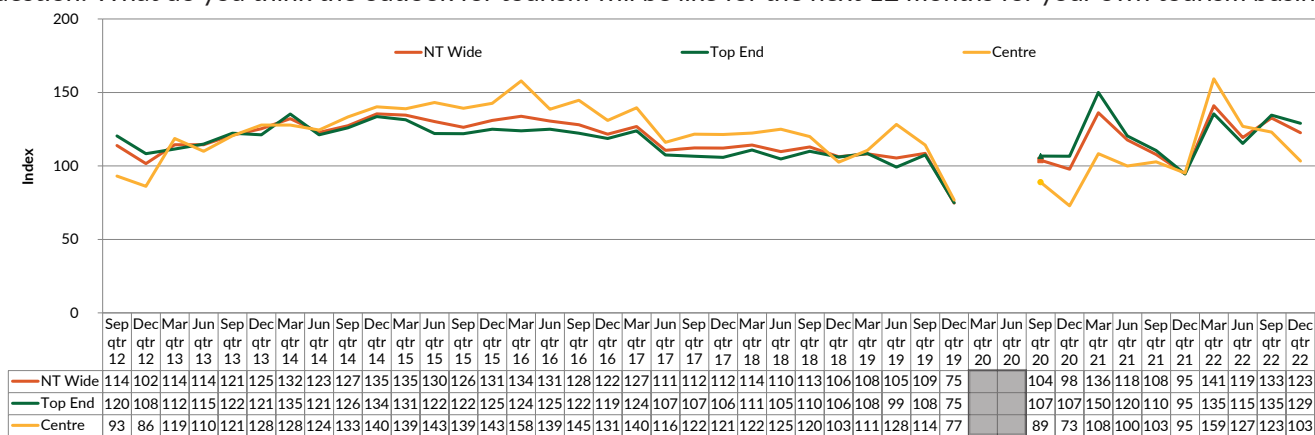


Tourism NT Industry Sentiment Poll December Quarter 2022

Industry Sentiment Poll: Business Outlook

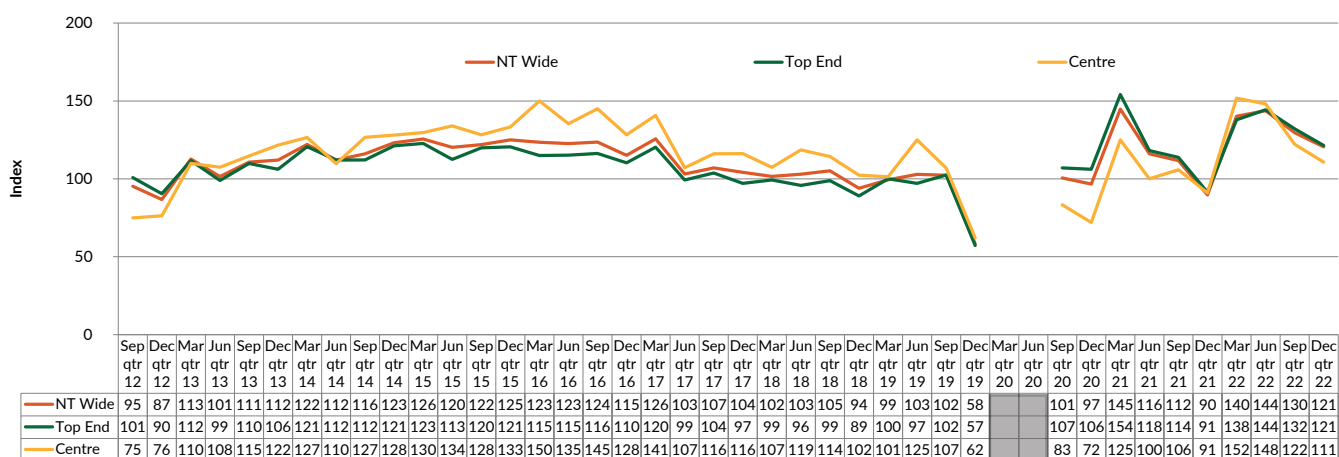
Question: What do you think the outlook for tourism will be like for the next 12 months for your own tourism business?



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. Similarly, operator sentiment related to regional outlook was also positive across all regions and the NT. While positive, Top End operator sentiment for their own business and region outlook was higher than in the Centre. The overall sentiment is aligned to the results of the Territory wide business confidence survey¹, with business confidence levels for the December quarter 2022 down 3 percentage points to 74 percent from the September quarter 2022.

While staffing issues continue to challenge business and industry confidence, the Australian Government announced another incentive in November 2022 to help meet labour shortfalls and skilled shortages. The temporary changes to the Work Bonus scheme encourages older Australians to return to the workforce without affecting their age pension significantly.

¹ NT business confidence survey, December quarter 2022, <https://industry.nt.gov.au/economic-data-and-statistics/business/business-statistics/business-confidence-survey>. Note: The NT business confidence is a quarterly publication that highlights confidence levels of Territory businesses across urban and regional areas as well as different industry sectors and business sizes.

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BUSINESS OUTLOOK

- Darwin and Surrounds (131ix)
- Katherine (183ix)
- Kakadu Arnhem (113ix)
- Barkly/Tablelands (no data)
- Alice Springs and Surrounds (106ix)
- Uluru and Surrounds (100ix)



REGIONAL OUTLOOK

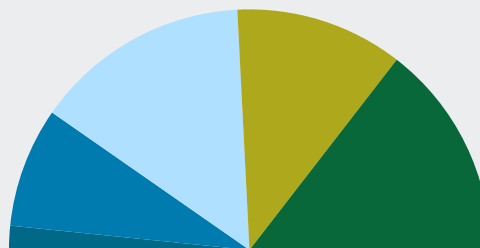
- Darwin and Surrounds (123ix)
- Katherine (167ix)
- Kakadu Arnhem (125ix)
- Barkly/Tablelands (no data)
- Alice Springs and Surrounds (125ix)
- Uluru and Surrounds (110ix)

TOP END BUSINESS OUTLOOK

129

 IX*

29 points above baseline n = 31



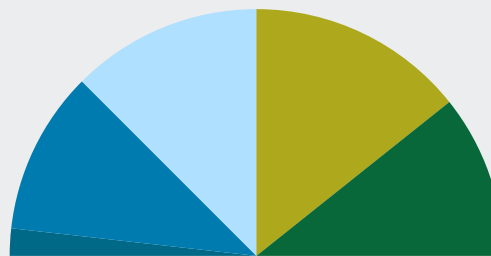
- Very Poor 3%
- Poor 16%
- Remain the same 29%
- Good 23%
- Very Good 29%

TOP END REGIONAL OUTLOOK

121

 IX*

21 points above baseline n = 28



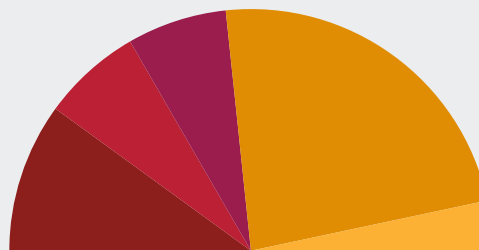
- Very Poor 4%
- Poor 21%
- Remain the same 25%
- Good 29%
- Very Good 21%

CENTRE BUSINESS OUTLOOK

103

 IX*

3 points above baseline n = 15



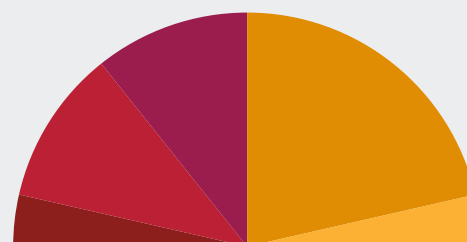
- Very Poor 20%
- Poor 13%
- Remain the same 13%
- Good 47%
- Very Good 7%

CENTRE REGIONAL OUTLOOK

111

 IX*

11 points above baseline n = 14



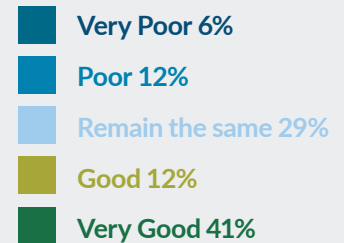
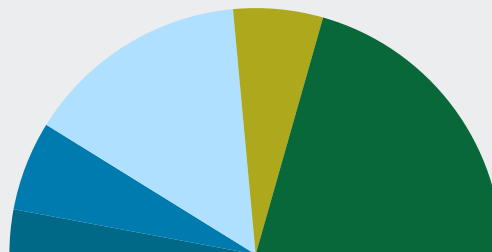
- Very Poor 7%
- Poor 21%
- Remain the same 21%
- Good 43%
- Very Good 8%

Tourism NT Industry Sentiment Poll December Quarter 2022

NT BUSINESS OUTLOOK BY SECTOR - Accommodation

135 IX*

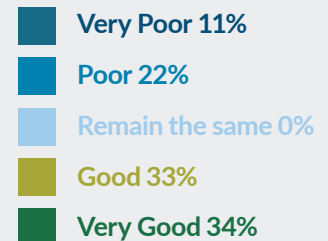
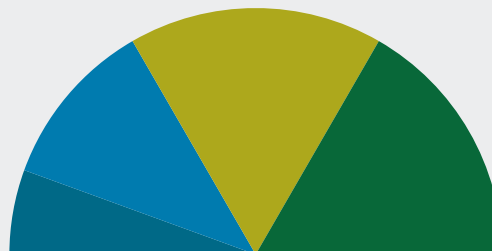
35 points above baseline n = 17



NT BUSINESS OUTLOOK BY SECTOR - Attractions

128 IX*

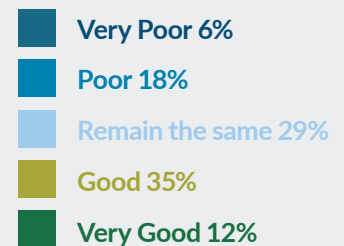
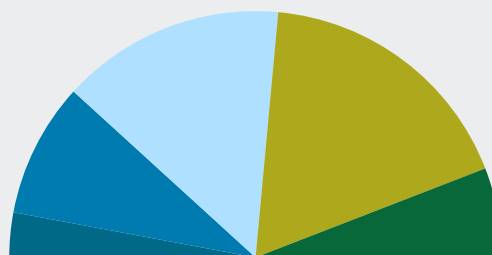
28 points above baseline n = 9



NT BUSINESS OUTLOOK BY SECTOR - Touring and Transport

115 IX*

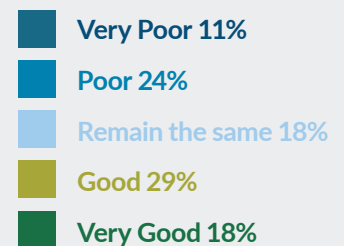
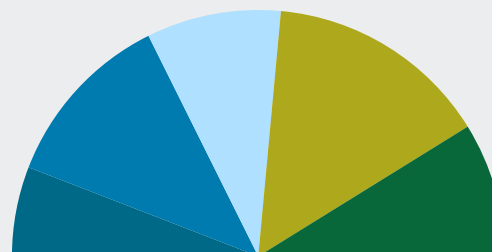
15 points above baseline n = 17



NT BUSINESS OUTLOOK BY SECTOR - All other Sectors

109 IX*

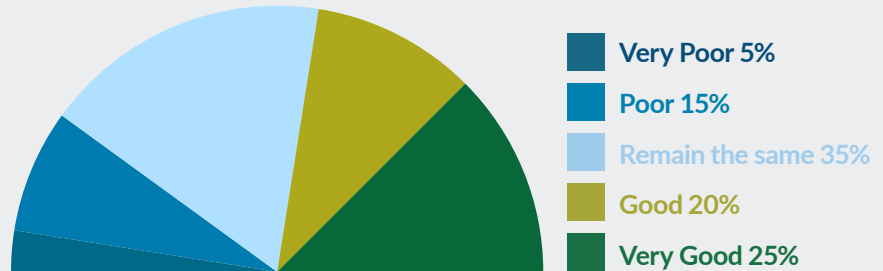
9 points above baseline n = 17



Tourism NT Industry Sentiment Poll December Quarter 2022

DARWIN AND SURROUNDS REGIONAL OUTLOOK INDEX*

123 IX*
n = 20

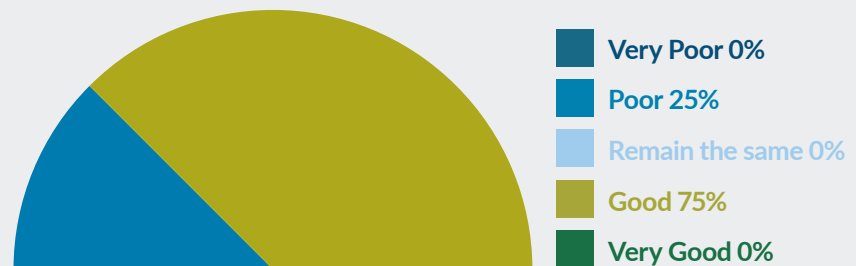


23 points above baseline

Operator outlook for the Darwin and Surrounds region was higher with over two fifths (45%) having a positive outlook for the next 12 months.

KAKADU ARNHEM REGIONAL OUTLOOK INDEX*

125 IX*
n = 4

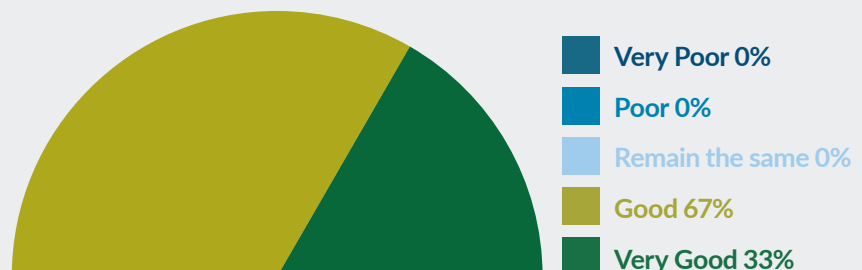


25 points above baseline

Operator outlook for the Kakadu Arnhem region was higher with three quarters (75%) reporting a positive outlook for the next 12 month period.

KATHERINE AND SURROUNDS REGIONAL OUTLOOK INDEX*

167 IX*
n = 3

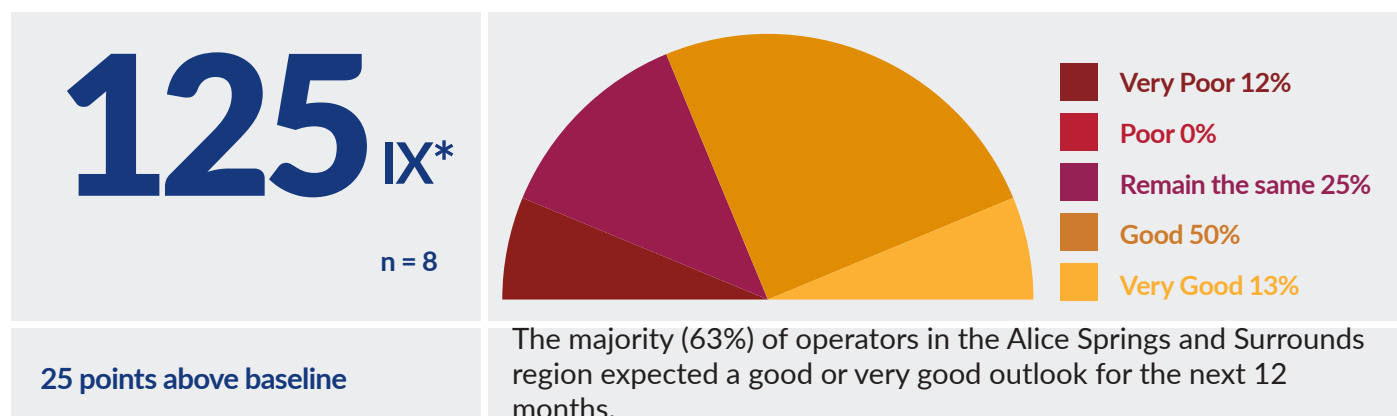


67 points above baseline

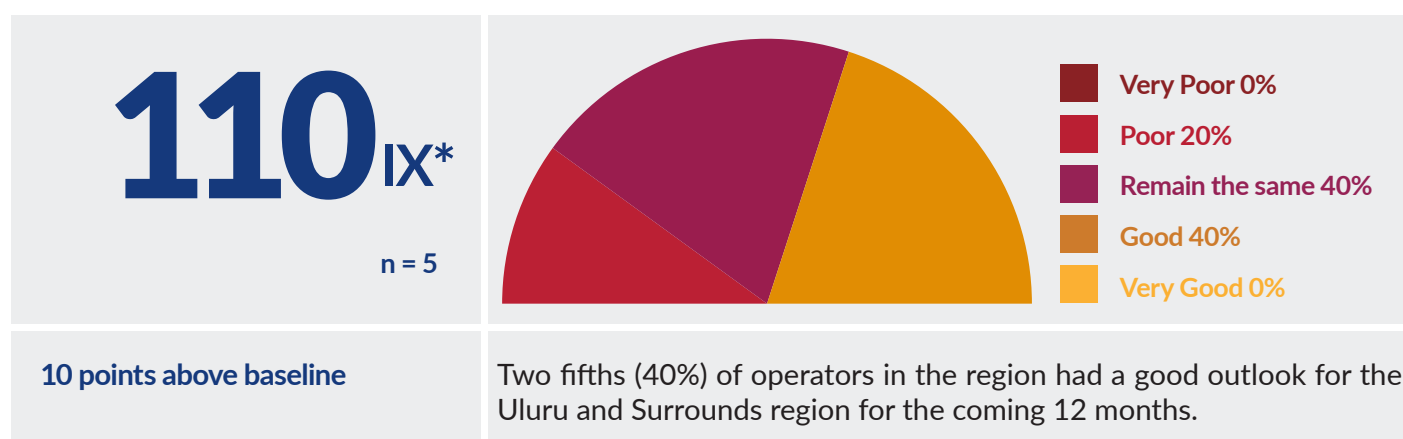
Operators in the Katherine and Surrounds region reported a positive outlook for the next 12 months, with two thirds (67%) having a good outlook and the remaining third (33%) having a very good outlook.

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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.

Disclaimer: The Northern Territory of Australia exercised due care and skill to ensure that at the time of publication the information contained in this publication is true and correct. However, it is not intended to be relied on as professional advice or used for commercial purposes. The Territory gives no warranty or assurances as to the accuracy of the information contained in the publication and to the maximum extent permitted by law accepts no direct or indirect liability for reliance on its content.

Tourism Research Australia estimated that there were 1,443 employing tourism businesses across the Northern Territory in 2020-21. 43 operators participated in the Industry Sentiment Poll for the December quarter 2022. Results presented for the Top End region from the Industry Sentiment Poll are informed by a sample size of 32 tourism operators. Results presented for the Centre region from the Industry Sentiment Poll are informed by a sample size of 15 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.