



Northern Territory Drive Tourism Strategy

2021-2030



**NORTHERN
TERRITORY**
TOURISM NT

Front Cover:
Driving - Stuart Highway

Back Cover:
Sunset - Tjoritja/ West MacDonnell National Park

This Page:
Touring the Territory - Strauss Airfield

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Purpose and development

Tourism has long been a valuable contributor to the Northern Territory economy, and has been identified as a key industry for development in the future.¹ Currently, drive visitors represent approximately 40 per cent of all visitation to the NT.² Drive visitation is vital to the Territory's visitor economy as it encourages regional dispersal, increases visitor numbers and increases length of stay.



The objective of the Drive Tourism Strategy (the Strategy) is to provide an analysis of the Territory's current drive market value and segmentation; to inform future market trends and opportunities; to identify impediments to growth and potential solutions; to identify required infrastructure; and to analyse and guide the marketing approach.

The Strategy considers a holistic approach to drive tourism, extending beyond self drive leisure visitors to include all-purpose visitors who use a self-drive vehicle to reach their destination, spending at least one night at a Territory destination. This Strategy does not include tour groups as part of the drive market, however Tourism NT acknowledges the outcomes of the Strategy will positively impact and improve conditions for road based tour operators.

The Strategy has four key focus areas:

- ✓ **Attract new growth markets:** increasing visitor numbers.
- ✓ **Improve the current visitor experience:** increasing length of stay.
- ✓ **Increase regional dispersal:** improving outcomes for regional areas.
- ✓ **Enhance brand reputation:** attracting key visitor markets.

Imperative for a Drive Strategy

Tourism NT invested in the development of the Strategy as part of a suite of actions from the NT's *Tourism Industry Strategy 2030* (Tourism 2030). Tourism 2030 articulated a need to develop a drive strategy to prioritise and advocate for delivery of required investment in key drive routes.³ This strategy supports and aligns to key recommendations introduced in Tourism 2030.

Key opportunities for new investments:

- complete sealing of: the Red Centre Way (Mereenie Loop) to enhance access to Kings Canyon and the West MacDonnell Ranges; and the Savannah Way through Katherine
- improving roads in and around Kakadu National Park, especially to enhance access throughout the tropical summer
- improving road access through Arnhem Land to Nhulunbuy and local communities year round
- safety improvements to existing infrastructure, such as installation of overtaking lanes.

Key opportunities for visitor experience developments:

- enhancing collaborative efforts with the South Australian Government on marketing the Explorers Way route between Adelaide and Darwin; and Western Australian and Queensland Governments in marketing the Savannah Way from Cairns through Katherine to Broome
- work with the Australian Government to deliver on priority road projects, especially within Parks Australia joint managed national parks
- ensuring tourism benefits are taken into account when assessing and prioritising new road infrastructure
- modernise camping and RV grounds
- working with Land Councils and Traditional Owners to develop and consider tourism opportunities along key drive routes.

This Strategy also aligns to Tourism 2030's visitor growth targets across the short, medium and long term.

¹ Territory Economic Reconstruction Commission, *Territory Economic Reconstruction Commission: final report*, published December 2020

² Tourism NT, *Leisure Drive Market to the NT Three Year Average 2017-2019*, published August 2020

³ Tourism NT, *NT's Tourism Industry Strategy 2030*, published September 2019



The development of Destination Management Plans (DMPs) is another important recommendation of Tourism 2030. Destination management ensures that tourism is cohesively integrated into the economic, social, cultural and ecological fabrics of a community, by considering tourism growth holistically, through a regional lens and over a long-term timeframe. This Strategy supports opportunities and initiatives outlined in regional DMPs, and focuses on increasing coordination between regions for both infrastructure and marketing to improve length and quality of stay, namely:⁴

- build a strategic approach to investment in road infrastructure and linkage of tourism priorities between the Territory's various regions
- promotion of regions in conjunction with other regions and states
- strategic coordination and delivery of infrastructure supporting tourism (signage, vehicle turning points, vehicle parking, rest stops, waste services, river access points and telecommunications)
- addressing communication blackspots on popular drive routes.

The DMPs indicated key interdependencies between regions and other states, highlighting the importance of drive tourism to regional visitation and dispersal. Regions such as Big Rivers, Barkly, Kakadu and Arnhem Land are all reliant on drive tourism.

Whilst this Strategy focuses on enabling drive tourism and regional dispersal; the development of experiences, icons and destinations will be addressed through the DMPs. As such, the action plan from this Strategy should be read in conjunction with the DMPs. For consistency in reporting and monitoring, actions for product development in the regions has not been included in this Strategy except where it has been identified as necessary to enabling the journey throughout the Territory.

The Territory Economic Reconstruction Commission (TERC), established to independently review and provide recommendations to accelerate the Territory's economic growth, recently delivered a report to the Northern Territory Government (NTG). The report highlighted tourism as a significant driver of the Territory's economic recovery. Several infrastructure upgrades highlighted in the TERC report will contribute to accelerating drive tourism and supporting product development, namely:⁵

- sealing the remainder of the Mereenie Loop
- improving access to Arnhem Land via the Central Arnhem Road
- improving road access to key Kakadu visitor sites, prioritising roads that extend the visitor season
- improving telecommunication infrastructure and access across the Territory.

The recommendations provided by TERC are supported and prioritised in this Strategy. Rapid implementation of this Strategy will allow the Territory to capitalise on post COVID-19 trends and domestic tourism growth.

This Strategy is underpinned by these significant bodies of work and seeks to provide further strategic insight into the recommendations. Whilst the Strategy does prioritise key projects within specific regions, it is overall designed to achieve whole of Territory outcomes.

Development of the Drive Strategy

As well as analysis of the work previously undertaken, comprehensive industry and government consultation also guided the development of the Strategy. Consultation was undertaken in the form of industry forums, meetings, online surveys and phone interviews. Department of Infrastructure, Planning and Logistics (DIPL), were members of the working group, in recognition of the vital role they play in the delivery of major infrastructure projects. Data sets from third parties commissioned by Tourism NT were also analysed.

The following key themes were identified to guide future tourism development and investment, key to ensuring visitor expectations are met or exceeded:

- ✓ **Infrastructure investments** required to deliver drive experiences demanded by the market.
- ✓ **Strategic partnerships** that cut across a range of responsible parties and underpin delivery of key initiatives.
- ✓ **Digital technology and marketing** that entice visitors from identified markets and enhance the drive experience both before and during the trip.

The Strategy will be used to inform road and infrastructure priorities for the drive market and outlines Tourism NT's strategic position, and how to get there. The Strategy will be updated inline with the monitoring and evaluation framework as Territory and national priorities are identified.



Drive market overview



⁴ Tourism NT 2021, *Destination Management Plans*, viewed 15 January 2021, <<https://www.tourismnt.com.au/research-strategies/strategies/destination-management-plans>>

⁵ Territory Economic Reconstruction Commission, *Territory Economic Reconstruction Commission: final report*, published December 2020



Snapshot of the drive market



Binns Track - Central Australia

Figure 1 – Visitor numbers, nights and expenditure of drive tourists in the Territory pre-COVID-19 (year ending December 2019)⁶



Sources: Tourism Research Australia, National and International Visitor Surveys, year ending December 2019.

Note: International figure represents average spend per night for international holiday visitors to Australia and not specifically the Territory. Intra-Territory and interstate figures show the average per night spend for self-drive visitors to the Territory

Figure 2 – Regional visitor numbers, nights and expenditure of drive tourists pre-COVID-19 (year ending December 2019)⁶

Region	Market	Total Visitation	Average Nights
Greater Darwin	Domestic	293,000	2.8
	International	49,000	16.1
Kakadu Arnhem	Domestic	91,000	2.7
	International	24,000	2.9
Katherine Daly	Domestic	199,000	3.0
	International	27,000	6.8
Barkly	Domestic	64,000	1.8
	International	10,000	2.3
Alice Springs MacDonnell	Domestic	199,000	3.6
	International	29,000	4.6
Lasseter	Domestic	130,000	3.7
	International	27,000	2.8

Sources: Tourism Research Australia, National and International Visitor Surveys, year ending December 2019.

*Caution required when interpreting results due to low sample size.

Note: Tourism Research Australia's Katherine Daly region and the region referred to as the Big Rivers region by Tourism NT represent the same boundaries. To ensure consistency in data interpretation, Katherine Daly is used when discussing Tourism Research Australia's data.

⁶ Tourism Research Australia, National and International Visitor Surveys, year ending December 2019.

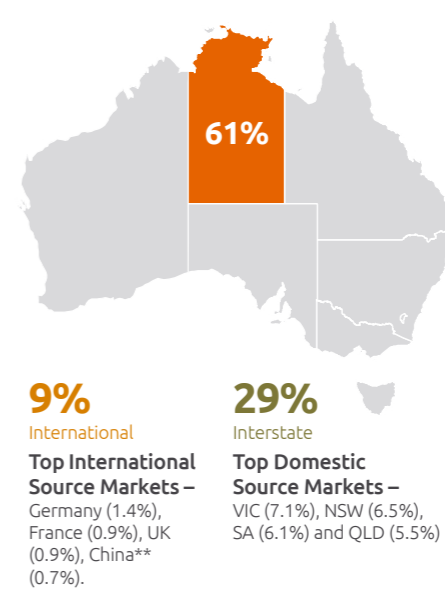


The below figures present a snapshot of drive tourism in the Territory, averaged over three years from year ending December 2017-2019.⁷

Figure 3 – Drive market visitation



Figure 4 – Drive source markets*



Source market percentages do not add up to 100% due to rounding.

**China includes mainland China, Hong Kong and Taiwan.

Figure 5 – Drive market places visited

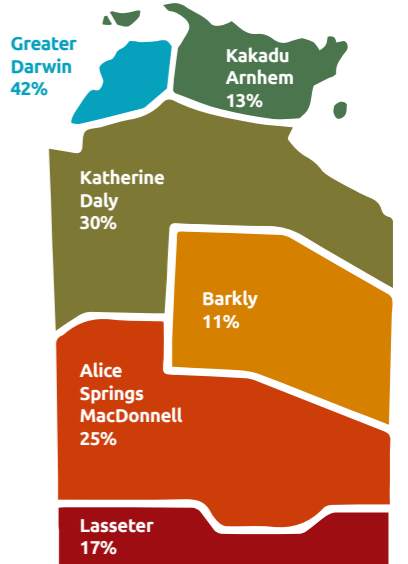
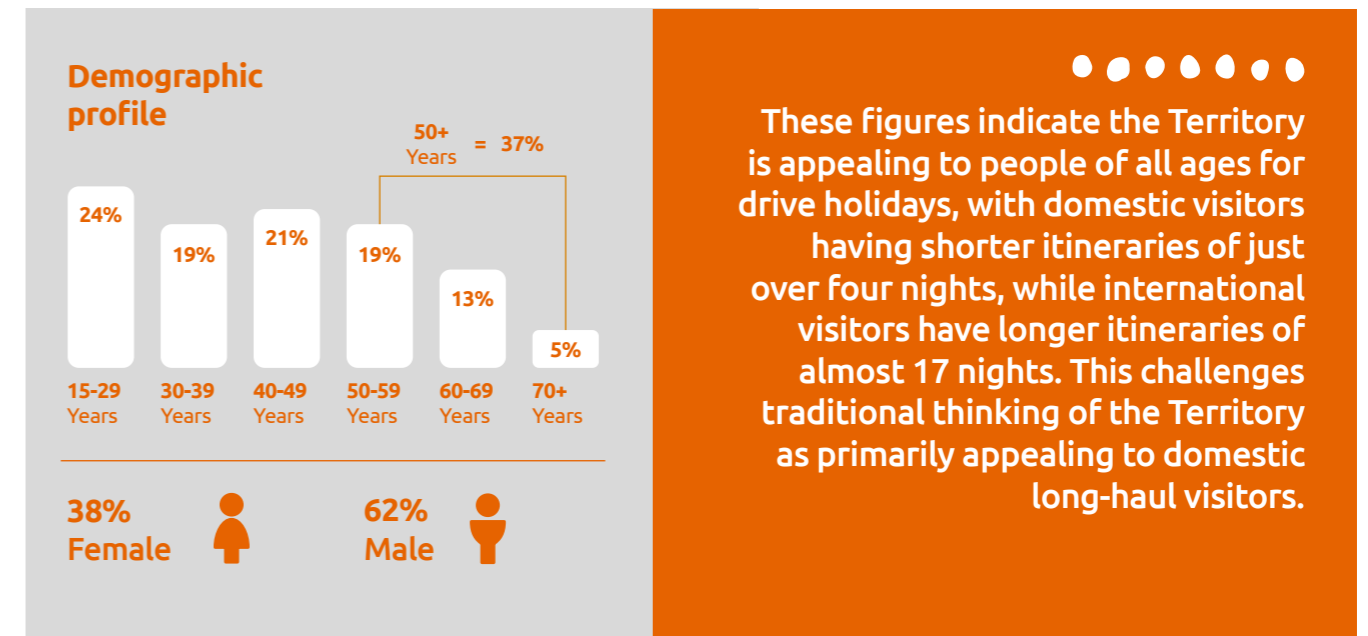


Figure 6 – Demographic profile



Note: The higher percentage of male business visitors slightly skews the gender demographic profile; measuring only leisure self-drive visitors would result in less difference between genders.

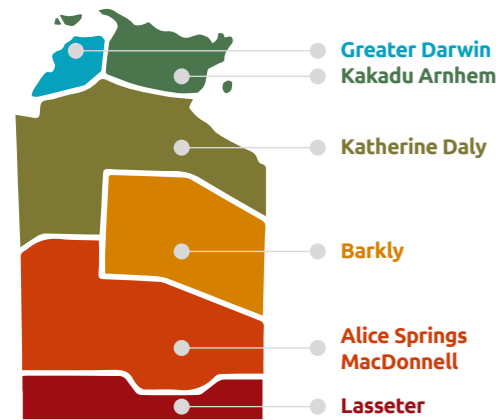
* First region is for tourism consumption only, second field is for visitation

⁷ Tourism Research Australia, National and International Visitor Surveys, 3 year average, year ending December 2017-2019.

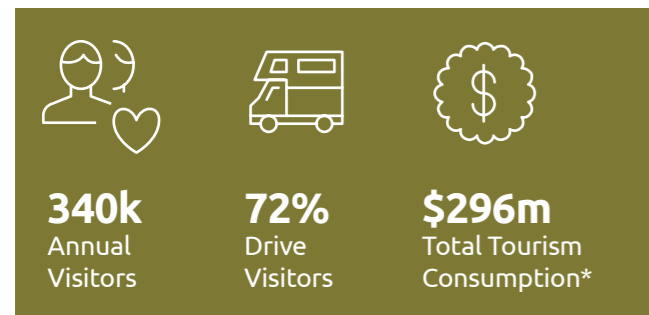


Regional profiles and key interdependencies

Regions



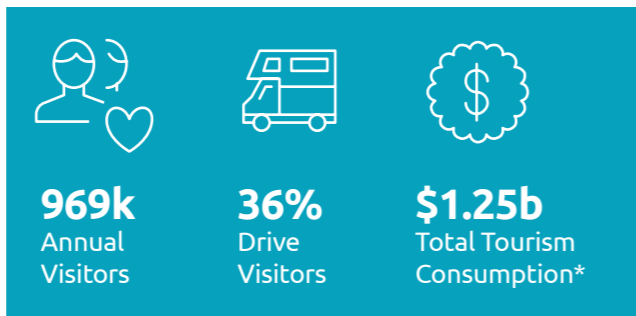
Katherine Daly Regional snapshot



Key interdependencies

- Strong visitation from the Barkly region, and significant on-travel north to Darwin, demonstrates the region's importance as an arterial route and the opportunity for cross-regional promotion.
- The region receives considerable visitation from QLD and WA. The majority of QLD visitors travelling from the Tropical North, with most WA visitors travelling from the Coral Coast via the Northern Highway or Gibb River Road, highlighting the importance of the Savannah Way.
- Only 24% of international visitors to the region entered through Darwin, highlighting the importance of alternative points of access.

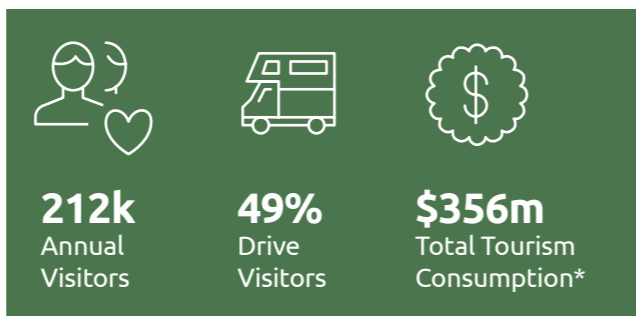
Greater Darwin** Regional snapshot



Key interdependencies

- Data illustrates that visitors (particularly interstate and international) to the Greater Darwin region provide considerable on-visitiation to all other regions within the Territory, showing Greater Darwin as a key entry and exit point for travellers to the Territory.

Kakadu Arnhem** Regional snapshot



Key interdependencies

- Data illustrates a strong link between visitors to the Kakadu Arnhem region and both the Greater Darwin and Katherine Daly regions, presenting an opportunity for further inter-regional promotion.



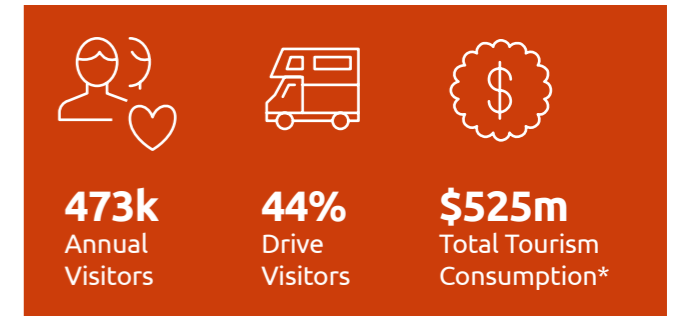
Barkly Regional snapshot



Key interdependencies

- The Barkly region is an important connector of tourism regions in the Territory, with many visitors travelling from Barkly onto other regions.
- The Barkly Highway provides a vital connection between NT and QLD.

Alice Springs and MacDonnell Regional snapshot



Key interdependencies

- Fewer than 30% of visitors to the region continue on to another region of the Territory. This indicates that the region is serving as an end destination for many trips to the Territory.
- Visitors to the Barkly, Lasseter and Katherine Daly regions provide considerable visitation to the region.
- Only 24% of international visitors to the region entered the country through Darwin, highlighting the importance of alternative access points.
- In recent years, drive tourism has been utilised in a near-equal proportion to air travel.

Lasseter Regional snapshot



Key interdependencies

- The Alice Springs and MacDonnell region is the main contributor of visitors to the Lasseter region.
- Sealing the Mereenie Loop has the potential to create a key access drive to the region.



Campers – Central Australia

* Figures for tourism consumption are based on financial year 3 year average.
 ** First region is for tourism consumption only, second field is for visitation.
 Tourism consumption data source: Tourism Research Australia, Regional Tourism Satellite Accounts.
 Visitor data source: Tourism Research Australia, National and International Visitor Surveys, 3 year average, year ending December 2019.

* Figures for tourism consumption are based on financial year 3 year average.
 Tourism consumption data source: Tourism Research Australia, Regional Tourism Satellite Accounts.
 Visitor data source: Tourism Research Australia, National and International Visitor Surveys, 3 year average, year ending December 2019.

Key traveller markets - traditional

Long-haul Drive



Visitors using their own vehicle and entering the Territory through one of the cross-border drives has long been considered the Territory's traditional drive market. COVID-19 presents significant opportunities with this market as international travel restrictions have boosted demand for new and used caravans, trailers and motorhomes which is expected to continue until 2022.⁸

Stakeholders support the continued investment into this market, citing the importance to regional and remote dispersal, and indicating that there are opportunities to slow these visitors down to spend more time in regions through improved visitor experience development. Per-night expenditure varies greatly within this market, acknowledging all infrastructure and visitor experience developments benefit the entire market. Findings from the fly-drive market indicated any developments targeting fly-drive would also benefit the long-haul travellers, who would still be motivated to travel by new loop drives in the Top End and Central Australia.⁹

Long-haul drive visitors prefer to stop every two to three hours, creating opportunity for heritage sites along the Stuart Highway including WWII and Telegraph sites to be enhanced through digital technology, encouraging visitors to stop more frequently and leading to an extended length of stay. As identified in the DMPs, this approach needs to be aligned with quality sites and product. Roadhouses offering a visitor experience along with a functional stop offer a similar opportunity to slow visitors down. Further investments into improving the visitor experience along long-haul drives need to be strategically considered and better coordinated with neighbouring states on cross-border routes. This Strategy will align closely with regional DMPs identified need to upgrade and develop product opportunities and improve infrastructure to meet the demands of this market.

Freedom Camper

Visitors who occupy as their accommodation choice a Recreation Vehicle (RV) or caravan that is self-sufficient and not limited to staying within established sites with onsite facilities are known as 'freedom campers'.

The demand for contemporary freedom camping options in the Territory is growing and already substantial. For the year ending December 2019, 400,000 trips were undertaken by freedom campers in the Territory representing nearly two million visitor nights.¹⁰

Nationally, RV ownership is growing at five percent per annum with 65 percent of the market owning vehicles for less than two years, indicating a significant trend.¹¹

The Territory's freedom camping market is diverse and expands beyond the traditional 'grey nomads' to include families, couples and high net worth individuals.

Manufacturers of RV's and caravans are increasingly including self-contained features such as showers, toilets and associated water holding tanks. As such, an increasing percentage of the market can now choose to stay overnight in un-serviced, open space locations, such as roadside stops, whilst maintaining a high level of comfort and amenity, reducing their reliance on commercial parks for one night stays.

Issues and challenges of catering for freedom campers is experienced by local communities and governments in the increased need to provide rubbish disposal, sewage and greywater disposal, occupational health and safety regulations, security, lighting and fire control.

Governments often face scrutiny by commercial operators for appearing to support freedom camping locations, such as roadside stops and therefore impacting competitive neutrality within the market.

Tourism NT recognises this sector of freedom camping is a growth market that is not currently being serviced adequately in the Territory. Improvements are required in the provision of locations with freedom, isolation and tranquillity, whilst satisfying traveller's desire to 'make budgets go further'.

Tourism NT, whilst not being a direct funder or provider, supports partners and the private sector to meet the needs of the freedom camper, provided all enabling regulations and policies are being met.

Many of the Territory's national parks currently cater to the market, but there still remains significant opportunities on pastoral leases, at roadhouses and on public land. For all development, it is imperative to ensure adherence to regulations, policies and the retention of competitive neutrality principles.

Four Wheel Drive (4WD)



The 4WD market is considered a traditional market within the Territory and a subset of the adventure market. Whilst this market experiences relatively low numbers, it is still considered an important market for its ability to deliver unique experiences particularly to intra-Territory and interstate visitors.

To further develop this market, experiences need to be genuine 4WD experiences as opposed to poorly maintained unsealed roads that require 4WD.

The Binns Track is the most well-known long-haul 4WD experience that will be considered for further development through this strategy, and is also noted in relevant DMPs. Long stretches of travel on the Stuart Highway, and long sections of remote dirt road driving may detract from the appeal of this track. Creating shorter curated experiences along the track, with significant 4WD challenges, may increase the appeal.

4WD experiences can also be found in many of the Territory's national parks and Indigenous Protected Areas (IPAs). These experiences vary greatly from fairly simple and accessible 4WD routes, such as those found in Kakadu National Park, to more serious 4WD adventures, such as those found in Judbarra/ Gregory National Park, which should not be attempted without adequate equipment and experience. IPAs, such as those found in East Arnhem Land, can also offer unique 4WD experiences.

The Territory already has a sufficient number of soft adventure drives involving dirt roads and water crossings through remote landscapes and national parks, though marketing does not always capture the full experience.



Outback driving - Alice Springs

⁸ Kyriakopoulos, A 2020, *trailer and caravan dealers Australia*, IBIS World, published November 2020

⁹ Instinct and Reason, *Research on drive tourism NT*, September 2019

¹⁰ Tourism Research Australia, *National Visitor Survey, summation by stopover accommodation*, December 2019.

¹¹ Caravan Industry Association of Australia, *National Profile*, December 2020

Key traveller markets - emerging

Fly-drive

In 2019, Tourism NT undertook extensive research into the domestic drive market to understand consumer needs from Territory drive holiday experiences. The research indicated a significant opportunity with the fly-drive market, that is, people who enter and depart the Territory via flights and travel within by vehicle. The fly-drive market has a high average expenditure per night, spending more on accommodation, experiences and food and beverages than other visitor segments.¹²

The primary motivation of the fly-drive market is to experience iconic nature and spectacular scenery. This market has a preference towards drives that are accessible by two wheel drive (2WD) and all wheel drive (AWD) vehicles. These consumers are seeking inclusive packages with airfares, vehicles and accommodation.

Further development of accommodation, experiences, attractions, improved road infrastructure and all inclusive packages will be needed to enhance demand and meet expectations of the fly-drive market.

Developing the fly-drive experience will also lead to growth in other markets, including business and leisure events, cruise and The Ghan.

Electric Vehicle

Electric vehicles (EV) will continue to be a growing trend throughout the life of this Strategy and needs to be planned for accordingly. Currently, the demand for EVs in the Territory is low but expected to rise within the next five to ten years along with global trends.

Globally, more than 2.1 million new EVs were sold in 2018, a growth of 64 per cent from 2017. 13 of the top 14 vehicle manufacturers have announced all new models by 2030 will be electric or part electric.¹³

The Australian Electric Vehicle Council forecast that by 2030 one third of all cars in Australia will be electric and this increases to half by 2035.¹⁴

There has been a steady increase in the number of charging stations available in the Territory, including three-phase charging stations developed at roadhouses along the Stuart Highway. These charging stations can take several hours to charge an EV, and allow travellers to charge their cars if staying overnight. Development of fast charging stations on major drive routes will create greater appeal to the market.

To develop this market, greater demand will be required through increased sale of private EVs and vehicle hire companies offering EVs. NTG and private sector will further need to ensure all enabling infrastructure is in place, such as fast charging stations along key drives. There are opportunities to increase the spend of these visitors through strategically placing fast charging stations at visitor experience sites, encouraging visitors to undertake the visitor experience whilst waiting thirty minutes for their vehicle to charge.

The NTG is currently preparing an Electric Vehicle Strategy and Implementation Plan, through DIPL. Tourism NT will work alongside DIPL to advocate for strategic placement of EV charging stations and optimise opportunities presented by the market.

Key findings

The development of the Strategy is underpinned by previous work undertaken, observation and consultation, during which several key shortcomings in the current drive experience were identified to be addressed in the next 10 years.

Communication



Communication: access to adequate telecommunications is the number one challenge facing visitors and operators, impacting visitor safety, experiences and business operations.

Visitor experience



Visitor experience: across the board stakeholders felt the drive visitor experience had declined, due to a lack of recent investment. Drive experiences need to focus on destinations, icons and journeys.

Marketing



Marketing: current marketing does not reflect the drive tourism experience adequately and visitors arrive with a poor understanding of the visitor experience, distances and road conditions. Current marketing focuses on traditional markets and misses opportunities with emerging markets. Packaging and bundling of drive itineraries is required to capitalise on emerging trends.

Collaboration



Collaboration: strategic partnerships need to be strengthened across government agencies and the private sector to improve the drive experience. Many of the actions identified require partnerships and delivery from other stakeholders.

Infrastructure



Infrastructure: significant gaps were identified across all critical and supporting infrastructure including roads, signage, roadside stops, roadhouses and accommodation. Projects to seal key roads including the Mereenie Loop and roads within Kakadu National Park were identified to extend the visitor season.



Journey into East Arnhem Land

¹² Instinct and Reason, *Research on drive tourism NT*, September 2019

¹³ Department of Infrastructure, Planning and Logistics, *Preparing the Northern Territory for Electric Vehicles Discussion Paper*, 2019

¹⁴ Australian Electric Vehicle Council, *Annual Report*, December 2020.

Communication



TERC identifies the need for access to digital technologies to improve and create economic opportunities in remote areas, strongly aligning to stakeholder sentiment during consultation. Today's visitor market expects access to adequate telecommunications to stay in touch with family and friends, share experiences and access visitor information along the journey. Post COVID-19 trends indicate safety has emerged as a critical concern, resulting in a greater demand to remain digitally connected to family and friends.¹⁵

Analysis and assessment

Access to adequate telecommunications is a long standing issue within the Territory. The majority of key drives, including national highways, do not have sufficient access. Depending on their service provider, visitors may only have access to telecommunications in main towns or cities, with limited to no access on drives between destinations.

This impacts the drive experience in three key areas:

Visitor safety: visitors often arrive unaware and underprepared with no form of emergency telecommunication devices, such as satellite phones. Varying road conditions present a challenge to some drivers, exacerbated by a lack of telecommunications should something go wrong. Currently, this places additional pressure on pre-visit marketing and visitor information services on arrival.

Visitor experience: visitors now share their experiences, undertake research and book visitor experiences along the journey. Many travellers also use telecommunication to identify sites of interest en route. Poor access to telecommunications, coupled with high speed driving, can result in visitors missing sites of interest as they travel and a decreased length of stay. Many visitor experiences along key drive routes could be further enhanced through digital activation, reducing pressure on critical infrastructure such as signage that often weathers poorly in the harsh Territory conditions.

Business operations: businesses located outside of town centres along key drive routes are often affected by telecommunications issues, despite playing a critical role in delivering the drive experience. This impacts the ability to service visitors effectively, including marketing and promotion, online bookings and regional information.

Digital activation will be vital to grow the value of drive tourism. This is a significant infrastructure investment, however improvements to telecommunication access would positively impact all sectors across the Territory.

Technology in remote communications provision is often changing, and emerging technologies may provide low cost alternatives to current telecommunications infrastructure in the future.

Visitor movements

Communications infrastructure, or increased use of current technologies (e.g. GPS) could assist Tourism NT to track visitor movements. Greater visitor movement data will enhance Tourism NT's ability to cater for the diverse drive market.

Currently, Tourism Research Australia (TRA) cannot provide reliable visitation data to some of the Territory's regions, as the sample sizes are too small. Several other states, Regional Tourism Organisations (RTOs) and private companies have developed methods to measure visitor movements and expenditure more accurately in regions, which may assist with Tourism NT's needs. This may best be achieved through partnerships with the private sector.

Until new methods of data collection have been established, Tourism NT will continue to use current data measurement methods provided through TRA to identify success.

Marketing



Overall, stakeholders felt current marketing does not reflect the drive tourism experience adequately, including imagery, distances and journeys. Therefore, visitors arrive with a poor understanding of driving in the Territory. Currently, there is not a collaborative approach to marketing drive routes between the Territory's regions, RTOs and neighbouring State Tourism Organisations (STOs), impacting the drive experience and pre-marketing information, particularly on long-haul drives.

¹⁵ Tourism Australia, *Industry Support COVID-19*, July 2020



Analysis and assessment

The visitor heat map provided by Tourism Australia (Figure 7) provides insights into the popularity of certain routes and indicates 'loop' drives out of Darwin and Alice Springs are the most travelled, followed by some cross-border routes into Queensland (QLD), South Australia (SA) and Western Australia (WA).

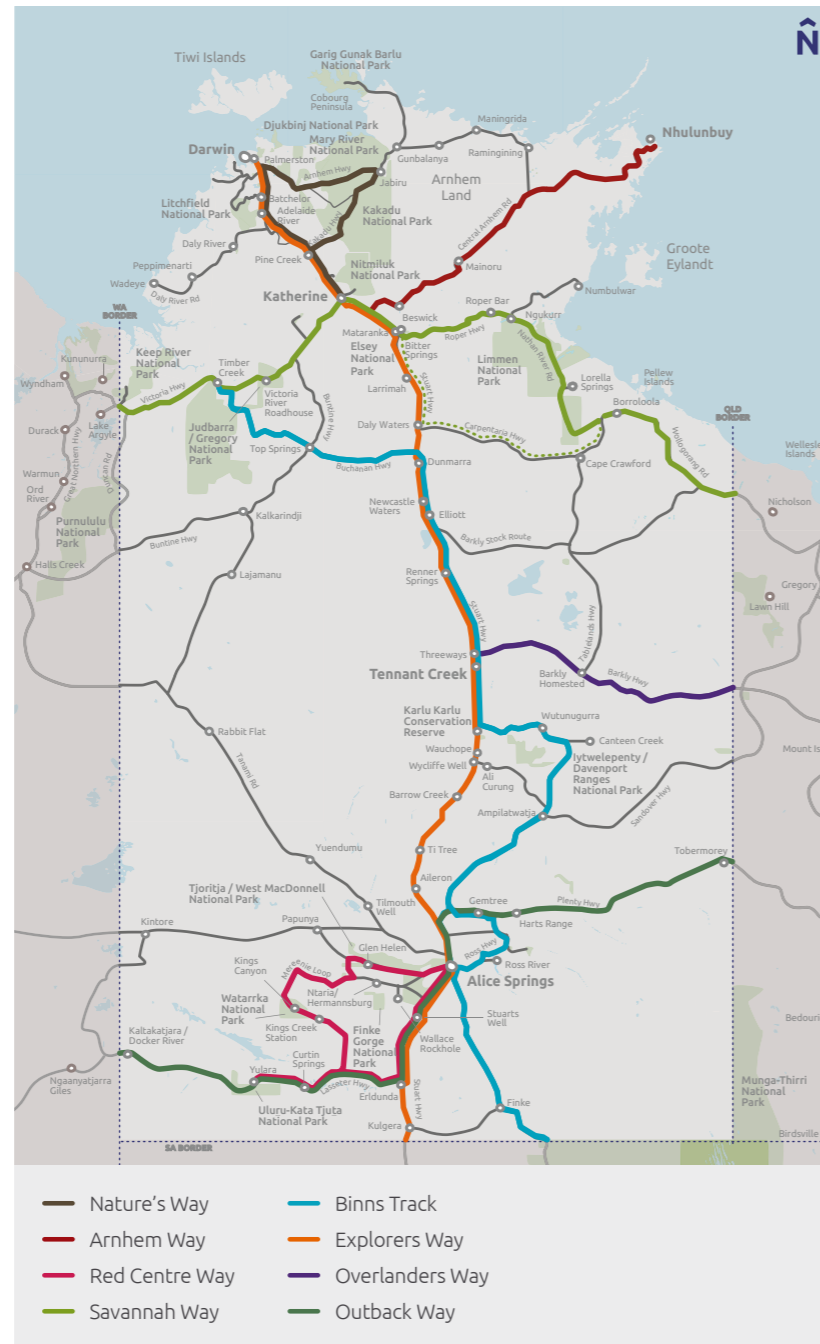
Tourism NT previously promoted eight key drive routes, also known as themed routes. Although some of these themed routes maintain value, findings show that drive visitors are interested in understanding the destinations, icons and journeys they will experience within their available travel days when making travel decisions. There is a need for clearer communication to the consumer on what they will experience, to capitalise on regional marketing and provide a higher organic search result online.

Current drive tourism marketing focuses on domestic and international traditional markets through digital, print and online platforms. The targeted approach is based on research conducted throughout the year, visitor trends and return on investment of these markets. The drive campaigns use a variety of media platforms to get messaging out, aiming to drive traffic to the consumer website *northernterritory.com* to build awareness, collect consumer data and provide an opportunity to book via trade partner deals. Data collected from the consumer website is used to inform trends in consumer behaviour.



Figure 7 (left) - overnight stay 'heat map' to demonstrate key drive route visitation
Source – Tourism Australia, 2020

Figure 8 - Northern Territory key drive routes, also known as 'themed routes'



Feedback during stakeholder consultation outlined that current imagery is not always reflective of the whole drive experience, providing consumers with a poor understanding of what to expect in the Territory. Tourism NT has already begun work to update imagery, and this will be continued across all online and print media.

Printed creative assets included the 'Essential Northern Territory Drive Map and Travel Guide'. This guide was not well received by operators, who indicated it is too large and difficult for consumer use. Since then, Tourism NT has introduced a newer version of the drive guide, which focuses more on inspiring visitors with suggested itineraries, and promoting a variety of experiences along the routes.

To support future drive markets Tourism NT's consumer website, *northernterritory.com*, will focus on drive itineraries with booking links to listings for accommodation, tours, activities and events.

Operator listings are taken directly from the Australian Tourism Data Warehouse (ATDW), which populates *northernterritory.com* and Tourism Australia's consumer website *australia.com*. Select drive itineraries from across Australia are showcased on *australia.com* giving NT drive routes and cross-border routes further exposure.

Tourism NT support the RTOs in the delivery of on-ground marketing through visitor information centres and the provision of marketing collateral. There is also current support for RTOs to attend various caravan and camping consumer shows across Australia, which provides the RTOs and operators an opportunity to promote the Territory as a drive destination. Over the years these consumer shows have grown to be major sales platforms for caravans, RV's and associated equipment rather than focusing on provision of visitor information.

Neighbouring STOs on cross-border travel routes still place high value in using the current themed routes, such as the Savannah Way, Outback Way and Explorers Way. This indicates there is perceived value within the international markets and Tourism Australia are great promoters of seamless travel and cross-border promotions. STOs indicated there had been a lack of coordination and understanding of responsibilities between neighbouring STOs for some time, impacting promotion and investments into the cross-border drives. Neighbouring STOs believe there is a need for a strategic and collaborative approach to be used to lobby the Australian Government for increased infrastructure funding, aiming for similar success as the recent developments to the Outback Way.

Other states and countries have established effective, standout partnerships with non traditional partners to promote drive holidays and distribute information. Such non traditional partnerships include vehicle manufacturers, credit card companies, energy and fuel companies, and fashion houses. These partnerships have opened up new targeted sales and distribution opportunities. Tourism NT has undertaken limited engagement with this style of partnership, though regularly partner with bookable products (e.g. airline and campervan companies) to take advantage of product reach.

A number of regional areas, private companies and other government agencies are developing, or have developed, digital visitor applications for smart phone devices, primarily designed for drive visitors. There is an opportunity for Tourism NT to investigate the use of more digital creatives, particularly those that can incorporate 'real time' information and interpretation using GPS technology, which will also be of assistance for wayfinding.



Bullita Homestead - Judbarra/ Gregory National Park



Infrastructure



Significant infrastructure gaps were identified in the current drive experience.

Roads: poor quality road conditions and non-existent or aging roadside infrastructure is affecting travellers' views on safety and also affecting visitor experience and perceptions.

Accommodation: accommodation gaps were identified along key drives, particularly in regional and remote areas, primarily relating to the variety of options and the current condition of options available. This is significantly impacting the Territory's ability to increase the length of stay from the current market and attract emerging markets.

Signage: requires a significant overhaul or change in approach, due to the poor condition of signage along key drives, impacting the visitor experience and perceptions.

Analysis and assessment

Infrastructure is fundamental in delivering world-class drive experiences. Due to high cost, infrastructure needs to be prioritised against what is likely to deliver the greatest ROI, taking into account the impact on all industries. Tourism NT are not primarily responsible for infrastructure delivery and therefore advocate to these agencies for prioritisation of tourism investment.

There are a number of existing and planned major projects for the Territory across various sectors. Whilst these are not directly tourism related, they are likely to benefit the tourism industry in the longer term through improved road infrastructure and new accommodation facilities. Major projects in the Territory commonly attract either Australian Government or NTG funding to improve critical infrastructure, based on their likelihood to deliver long-term economic benefits.

Tourism NT's road priorities are determined using available data, to identify and prioritise projects considered to be the greatest benefit to the Territory's local economy. Tourism NT undertakes tourism benefit analysis on priority roads to identify the infrastructure required to grow the value of drive visitation, facilitate regional dispersal and give visitors and residents the ability to access the Territory's unique visitor experiences. This analysis can further assist in identifying how the tourism economic benefit compares against other industries.

Summary of projects within the Territory that tourism can leverage

There are several committed road projects that will undergo major infrastructure developments within the next ten years. Most of these projects are administered by DIPL under progressive funding agreements with the Australian Government, with a long term vision to seal in their entirety. Each road has an investment strategy that determines priority works in relation to the amount of funding committed. There are also several planned regional and remote projects within the Territory that have achieved major project status and support from NTG for their ability to deliver significant economic impact.

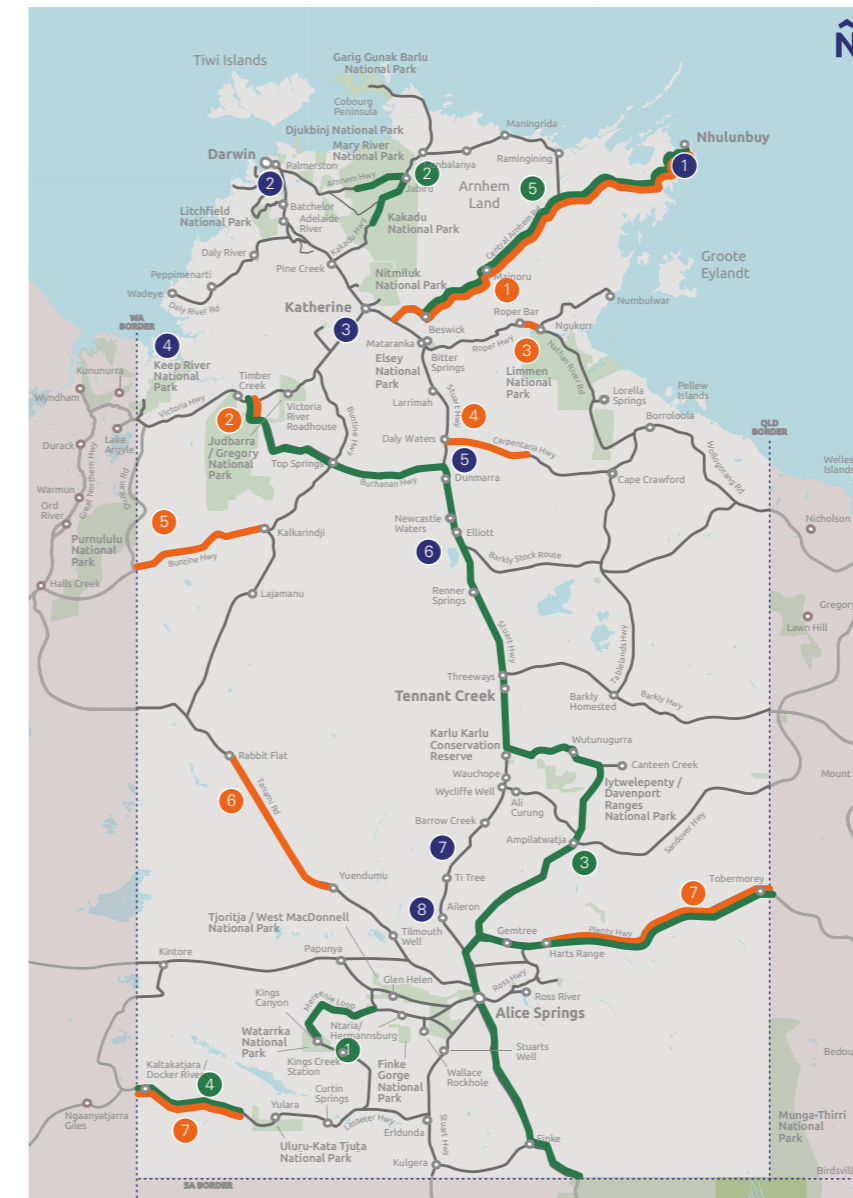
Recent Tourism NT plans and strategies have identified priority road projects based on the potential to significantly increase visitation to regions and are supported by this Strategy.



Daly Waters Pub - Daly Waters



Figure 9 – Summary of Territory road projects



Key drive projects identified in other tourism plans (Tourism 2030 and DMPs)

- 1 Complete sealing the Mereenie Loop
- 2 Seal priority roads in Kakadu National Park
- 3 Enhance the Binns Track experience and facilities
- 4 Complete sealing of the Outback Way and upgrade the wayside facilities and experiences
- 5 Develop tourist drive route linkage to East Arnhem Land

Other major Territory projects

- 1 Arnhem Space Centre
- 2 Finnis Lithium Project
- 3 Katherine Logistics and Agribusiness Hub
- 4 Project Sea Dragon
- 5 Beetaloo Basin Project
- 6 Solar Farm and Sun Cable
- 7 TNG Mount Peake Project
- 8 Nolans Project

Funded major road projects*

- 1 **Central Arnhem Road**
Committed funding for upgrades to approx. 30% of road.
Priorities will be informed through an investment strategy.
Expected Finish: 2029
- 2 **Jasper Gorge**
Partial funding for works to upgrade road to Jasper Gorge.

- 3 **Roper Highway**
Complete sealing road from Roper/Wilton bridges to Ngukurr.
Expected Finish: 2023
- 4 **Carpentaria Highway**
140km of upgrades to convert from single lane to sealed two-lane road, Stuart Highway end.
Expected finish: 2023/24
- 5 **Buntine Highway**
Progressive upgrades between Kalkarindji and Western Australia border.
Expected finish: 2029

- 6 **Tanami Road**
Another third of the road will be sealed between Yuendumu and Rabbit Flat.
Priorities will be informed through an investment strategy.
Expected Start/Finish: Late 2020 - Mid 2026
 - 7 **Outback Way**
Progressive sealing of Outback Way. Works delivered in accordance with investment strategy.
Expected Finish: ongoing.
- The Outback Way has been successful in attracting funding as it has an advocate bringing stakeholders together and lobbying governments.**

* Information on major road projects provided by the Australian Government, Department of Infrastructure, Transport, Regional Development and Communications.

Visitor experience



Across the board, stakeholders felt the drive visitor experience had declined, through little to no new investment in product along key drives. There was also a belief there had been a decline in the visitor experience at Kakadu National Park and Uluru-Kata Tjuta National Park.

Analysis and assessment

The following provides an assessment of the current visitor experiences found along the Territory's drives namely, food and drink, history and heritage, cultural and adventure tourism.



Food and drink

The majority of vehicle based travellers moving along the touring routes use roadhouses to refuel their vehicles and purchase food and drink to consume immediately, or whilst in their vehicle. Generally, food is packaged and generic with little effort made to offer a quality environment to consume on site. The current offerings fail to provide food that is 'fresh, local and seasonal'.

Townships along the way have improved their food and drink offerings with pop up cafes serving coffee and light meals. Iconic signature restaurants at major attractions are only available in association with township based resorts with few experiential dining options available. There is little evidence of catering to dietary needs of vegetarians, vegans and those with food allergies who require special menus and food preparation.



Heritage and history

Historic sites associated with WWII defence and logistics are poorly presented and lack information and activation. Telegraph stations and pastoral properties have well maintained buildings but fail to engage the visitor, often with poorly presented interpretation. Mining sites often display old equipment but fail to inform, engage and excite the visitor. Visitor amenities at historic sites are often poor to non-existent, resulting in minimal time at the sites.



Cultural tourism

All touring routes travel through areas of Aboriginal owned land however there is limited recognition and information available to inform visitors. Overall, there is limited cultural visitor experiences available on all touring routes. Research indicates that visitors to the Territory seek Aboriginal cultural experiences as a key motivator for travel.¹⁶

The Northern Territory Government, through its *Northern Territory Aboriginal Tourism Strategy 2020-2030* (Aboriginal Tourism Strategy), is committed to working with Land Councils to identify Aboriginal land owners seeking to create tourism developments and experiences.



Adventure tourism

Tourism NT promotes and encourages development of a range of adventure tourism experiences including; mountain biking, hiking, fishing and four-wheel driving.

Many of the adventure experiences in the Territory are only accessible by road, with the option to link a number of them to create drive itineraries. The Savannah Way is an example of an adventure drive experience, consisting of camping, hiking and fishing options. However the Savannah Way is not a curated 4WD experience, despite the market's impression as such, due to its poorly maintained dirt roads.

The Binns Track is the only curated 4WD experience marketed by Tourism NT, though there is broad appeal for this market in the Territory as many of the iconic sites within our national parks require a 4WD to access.

Collaboration



Stakeholders identified several strategic partnerships that require strengthening to improve the drive experience.

Analysis and assessment

Drive tourism has a high dependency on infrastructure improvements and service delivery, with a number of the actions from the Strategy sitting outside of Tourism NT's business functions. Tourism NT partners with relevant government agencies to advocate for tourism priorities. Tourism NT also provides tourism expertise through undertaking market analysis, cost benefit analysis, master planning and investment attraction support.

Tourism NT's marketing functions also require close connection to travel trade and distribution partners, as well as local operators.



Blyth Homestead - Litchfield National Park

Key partners for Tourism NT in delivering drive experiences include:

- **Department of Infrastructure, Planning and Logistics (DIPL):** road conditions, signage and supporting infrastructure are critical to the drive experience. Road investments enable market growth and visitor experience development.
- **Parks Australia:** Kakadu National Park and Uluru-Kata Tjuta National Park are the Northern Territory's major tourism icons, both critical to the drive experience and in need of visitor experience investments.
- **Parks and Wildlife NT:** experiencing the Territory's natural assets is a primary motivator for drive visitors.
- **Australian Government:** supply the majority of road infrastructure funding.
- **Local Government:** provision of services important to regional and drive tourism.
- **Regional Tourism Organisations:** run visitor information centres, undertake regional marketing and act as member based industry organisations.
- **State Tourism Organisations:** essential in the visitor experience delivery of cross-border drives.
- **Tourism Australia:** promote the Territory as a tourism destination to the international market and support industry with training and familiarisations.
- **Land Councils:** administer the Aboriginal Land Rights (NT) Act 1976, governing access to Aboriginal lands. They also assist Aboriginal landowners seeking tourism developments and opportunities, aligning with the outcomes of the Aboriginal Tourism Strategy.
- **Private sector:** responsible for key service delivery and product development in the drive market experience, including: roadhouses, accommodation providers, vehicle hire and attractions.
- **Airlines:** provide flight access to the Territory. To ensure tourism recovery, flexible policies for re-booking and cancellation are crucial in providing a safety net for travellers around unexpected changes in circumstances impacting their travel.
- **Domestic travel trade:** increase drive product and packages for sale and distribution.
- **Inbound tour operators and international wholesalers:** increase drive product and packages to international markets.
- **Regional economic development organisations:** can be both government or non-government and guide the regions economic priorities and feed into whole of government economic plans.
- **Stakeholder organisations:** such as Savannah Way Ltd and the Outback Highway Development Council Inc can provide advocacy and coordinated marketing for a particular road or region.



Strategy goals



Finke River 2 Mile - Tjoritja/ West MacDonnell National Park



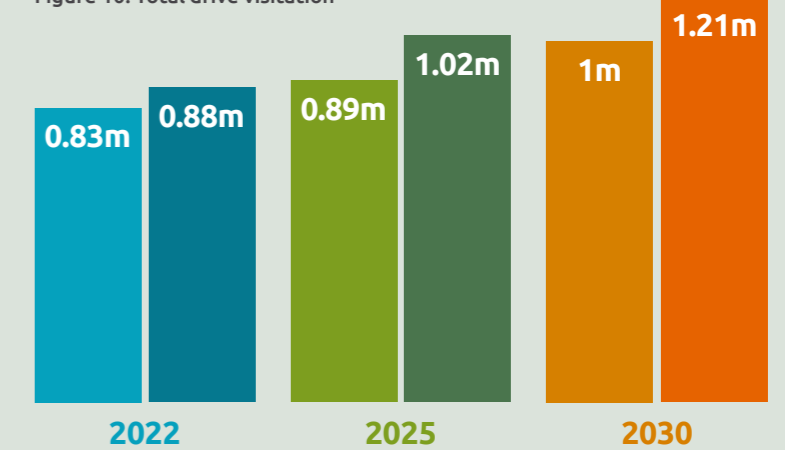
Northern Territory Drive Tourism Strategy (2021 – 2030)



Our Vision

To deliver self-drive outback adventure experiences that showcase the Territory's iconic natural environments and unique cultural identity.

Figure 10: Total drive visitation



This graph displays minimum and maximum projected visitor ranges for each time horizon.

Our Goals

This Strategy aligns with Tourism 2030 growth targets for total overnight visitor arrivals and expenditure, with drive tourism retaining its share at 40 percent of visitation.



Short (2021–2022)

Achieve 2022 growth goals by targeting traditional long drive markets as well as high yield domestic markets.



Medium (2023–2025)

Achieve 2025 growth goals by targeting the international market and further expand domestic focus to include the adventure market.



Long (2026–2030)

Achieve 2030 growth targets through introducing a new range of drive experiences targeting new markets.

This strategy contributes to the overall achievement of Tourism 2030 by helping to:



grow visitor numbers



improve regional dispersal



increase length of stay

All actions within this Strategy will be assessed against these outcomes.

Competitive advantage

The Territory can deliver on a range of unique, quality driving experiences that generate a sense of belonging and connection to iconic landscapes. The desire to seek and experience natural iconic locations such as Uluru-Kata Tjuta National Park, Kakadu National Park, Nitmiluk National Park, Litchfield National Park, the Red Centre and Arnhem Land are powerful motivators and have great appeal.

Iconic drives have three distinct aspects that make them stand out and appeal to the fly-drive high yield market:

1. They start and finish at a specific destination, providing certainty.
2. The journey has a compelling story and provides context where the traveller learns something about themselves and the world in which they live.
3. They include the opportunity for iconic imagery of nature and dramatic landscapes.



Priority markets

Tourism NT will focus on growing the value of the drive tourism market through targeting priority markets likely to have the greatest impact on visitor numbers, regional dispersal and length of stay.

The prioritisation of future focus markets is informed through consultation and research, from which a number of opportunities were identified. Tourism NT recognises the need to ensure that, whilst focusing on emerging markets, traditional high-yield markets are not forgotten.

In the short term, value lost through reduced international tourism places additional need to grow the value of the domestic market.

Short term market priorities (2021-2022)




 Achieve 2022 growth goals by targeting high yield domestic markets of fly-drive and long-drive.

2022 Growth Goals

 Drive visitor numbers between 0.83M and 0.88M

Tourism NT will focus on marketing towards the high yield domestic market, through promoting multi-day drive itineraries focusing on icons, destinations and journeys. Primary focus will be marketing 4-7 day loop drive itineraries out of Darwin and Alice Springs targeting the fly-drive market. Fly-drive itineraries are highly appealing to the domestic market, providing an opportunity irrespective of international borders opening. Tourism NT acknowledges the heavy focus on fly-drive needs to be balanced with maintaining market share from traditional markets. As such, focus will also be targeted towards the high yield section of the long-drive traveller, acknowledging that any benefits to these will benefit all of the long-haul market.



Markets	Description	Traveller preference	Travel patterns
Fly-drive – domestic 	Interstate visitors who enter the Territory via flight and hire a vehicle to travel to destinations.	<ul style="list-style-type: none"> inclusive travel packages and deals mobile coverage safe and comfortable driving experiences <ul style="list-style-type: none"> sharable experiences and moments (icons) prefer 2WD or AWD vehicles. 	<ul style="list-style-type: none"> 4 to 7 day itineraries start and conclude from the same location (loop routes) travel on safe, sealed and well signed roads stop on a regular basis (every 3 to 4 hours) drive in daylight hours only.
Fly-drive – international 	International travel is likely to rebuild through a staged approach. The focus is on preparing for market return, and potential travel bubble arrangements as they emerge.	<ul style="list-style-type: none"> packaged drive experiences via travel trade linking Territory drive experiences with cross-border drive itineraries safety information provided in vehicles maps and safety information made available in multilingual forms prefer 2WD and AWD vehicles. 	<ul style="list-style-type: none"> certain markets will favour drive experiences with tour operators rather than self-drive drive in daylight hours only 7 to 10 day itineraries.
Drive – domestic (long-haul) 	Interstate visitors who drive from home. This segment contains low and high yield travellers. Tourism NT will prioritise the high yield traveller, seeking a diverse range of quality accommodation and experiences.	<ul style="list-style-type: none"> good road surfaces, passing points and signage secure parking close to attractions and destinations mix of secure freedom camping and managed overnight sites access to dump points and rubbish collection require wayside stops for rest (not overnight). 	<ul style="list-style-type: none"> will stay longer in favoured locations and explore the region extensive use of Visitor Information Centres self-contained and not necessarily seeking services and facilities of traditional family caravan parks.

There is a need to maintain current high levels of intra-Territory travel and grow our visiting friends and relatives (VFR) market. It will be vital to retain spend within the Territory.

Drive – Territory (inc VFR) 	Territorians who commence drive holidays from home and remain within the Territory.	<ul style="list-style-type: none"> confident, experienced and self-sufficient driving in Territory conditions. 	<ul style="list-style-type: none"> will cover greater daily distances preference for camping and caravan accommodation.
Fly-drive – Territory (inc VFR) 	Territorians who fly and hire a vehicle.	<ul style="list-style-type: none"> flexible packages (not fully inclusive). 	<ul style="list-style-type: none"> 3 to 5 day itineraries activity, attractions and events to enjoy with friends and relatives.



Short term market priorities (2021-2022)

Visitor numbers between 0.83M and 0.88M

Potential impediments to growth

Travel restrictions and consumer sentiment: uncertainty in border opening and closing with current COVID-19 restrictions is damaging consumer confidence to book holidays far from home.

Air capacity and pricing: attracting the fly-drive market will be challenged by high flight prices to, from and between Territory locations. Travellers are also nervous of travel restrictions due to COVID-19.

Vehicle hire access: availability and pricing of 2WD and AWD vehicles may create an impediment to growing the fly-drive market. COVID-19 has seen vehicle shortages due to offloading of stock.

Workforce shortages: roadhouses and remote areas often rely on international travellers on working holiday visas to make up staffing numbers during the peak seasons. With the reduction in available international workers, remote areas and hospitality businesses may be understaffed.

Inadequate digital and telecommunication coverage: visitors are now expecting access to telecommunications when they travel. The high infrastructure costs of providing telecommunications means there is unlikely to be significant change in the short term, reducing traveller confidence and ability to book and research on route.

Product quality: in this timeframe, there is unlikely to be significant changes to products.

Poor safety and security perceptions: many travellers in the key focus markets are not confident travelling on unsealed roads. Some areas of the Territory suffer from poor perceptions of visitor safety.

Measure and monitor: currently Tourism NT does not have the ability to capture live traveller data and collection of road traveller data in regional areas is difficult. This means it is hard to rapidly respond to traveller trends and changes.

Lack of bookable product: travellers within short-term target markets prefer bookable product, including all inclusive packages, which are currently limited.

Land access permits: a poor understanding of permit systems and requirements to enter Aboriginal lands results in travellers avoiding these areas, counteractive to the Aboriginal Tourism Strategy and the ability for Aboriginal land owners to develop tourism opportunities.

Progressing major investments: much of this Strategy relies on major investment. Slowing or halting these developments will create further impediment to growing the drive market.

Savannah Way - Big Rivers Region



Medium term market priorities (2023-2025)



Achieve 2025 growth goals by targeting the returning international market and further expand the domestic focus to include the adventure market.

2025 Growth Goals



Drive visitor numbers between 0.89M and 1.02M

Tourism NT will focus marketing efforts towards the international market, whilst maintaining the domestic market share achieved in 2021-2022. International marketing will be targeted further towards the fly-drive market with similar principles applying to domestic fly-drive, however with a focus on longer itineraries in recognition that international visitors generally stay longer. This will be achieved through focusing on loop itineraries and 'road trips' with visitors commencing in one destination and finishing in another.

Markets	Description	Traveller preference	Travel patterns
 Fly-drive – international	Consistent with other fly-drive markets, however, to be achieved when international travel opens completely and is un-restricted.	<ul style="list-style-type: none"> refer to other fly-drive markets preference to book via travel agents on the back of COVID-19 visitors from countries that experienced severe COVID-19 lockdowns will want safe and clean destinations that embrace natural landscapes and open spaces. 	<ul style="list-style-type: none"> 7-10 day itineraries drive itineraries incorporating multiple regions drive itineraries incorporating one or more Australian states or territories.
 4WD	4WD visitors have been a traditional source market for the Territory.	<ul style="list-style-type: none"> designed 4WD experiences that include iconic locations and experiences fully self-contained travel access to suitable vehicles and safety equipment seeking untouched and secluded sites, referred to as 'secret spots'. 	<ul style="list-style-type: none"> growing international market specialist agents selling experiences.

Visitor numbers between 0.89M and 1.02M

Potential impediments to growth

Travel restrictions: uncertainty to book holidays far from home if state border closures due to COVID-19 restrictions continue. Consumer confidence to book international holidays will continue for many of the NT's traditional international markets.

Significant changes to travel trade distribution: significant changes to the travel trade industry may require re-connection to ensure Territory product remains bookable.

Air capacity and pricing: attracting the fly-drive market will be challenged by high flight prices to, from and between Territory locations. Travellers are also nervous of rigid cancellation policies.

Consumer sentiment: returning travellers may have concerns around safety and security post significant travel disruption from COVID-19.

Land availability: to increase new product, and appeal to the 4WD market, the perception that Aboriginal lands, national parks and pastoral lands are closed to tourists will need to be shifted.

Growing the visitor economy: ongoing investment into product and infrastructure is required.


Regional product opportunities: to ensure regional dispersal and to increase length of stay, new product needs to be available in regional areas.




Touring the Territory - Stuart Highway




Long term market priorities (2026-2030)


 Achieve 2030 growth targets through introducing a new range of drive experiences targeting new markets.

 **2030 Growth Goals**

 Drive visitor numbers between 1.00M and 1.21M

Significant infrastructure projects will be completed in this time horizon that will create new drive tourism routes. As such, this timeframe will be largely focused on marketing, and ensuring new product is developed, to be driven by the regional DMPs. Marketing efforts will primarily focus on new experiences and enhancements to drive experiences, with an aim to continue to grow domestic and international markets whilst attracting new market opportunities.

Markets	Description	Traveller preference	Travel patterns
Electric vehicles (EV) 	Visitors using electric vehicles (including personal and hire vehicles).	<ul style="list-style-type: none"> overnight charging facilities at locations throughout the Territory speed charging plugins available at attractions and roadhouses with experiences to occupy travellers whilst charging occurs. 	<ul style="list-style-type: none"> increasing national and global use of electric vehicles specialist clubs have been established to encourage group tours environmentally conscious.



Visitor numbers between 1.00M and 1.21M

Potential impediments to growth

Delays with infrastructure projects: resulting in infrastructure not meeting demands of the changing markets.

Product development not matching infrastructure timelines: changing infrastructure timelines causes uncertainty in product development.

Environmental concerns of long haul travel impacting traditional source markets: visitors from traditional source markets are becoming more environmentally conscious, which has the potential to impact long haul travel.

Interstate competition: Tourism NT is competing with neighbouring STOs to attract visitors, and requires ongoing development of iconic experiences unique to the Territory.

Lack of product and experience development in iconic national parks: as the number one attraction for travel in the Territory, product and facilities in parks need upgrading to meet or exceed visitor expectations.



Future drive experiences

Future focus of the Territory drive experiences to meet market demands

The world's most iconic drive routes all have three key components:¹⁷



Destinations



Journeys



Icons

Moving forward, all drive routes promoted by Tourism NT should incorporate these three key elements.

Priority is given to experiences likely to generate the greatest immediate demand with key focus markets and therefore largest economic impact.

Priority one: development of two 2WD loop drive experiences, one out of Darwin and the other Alice Springs, currently known as Nature's Way and Red Centre Way.

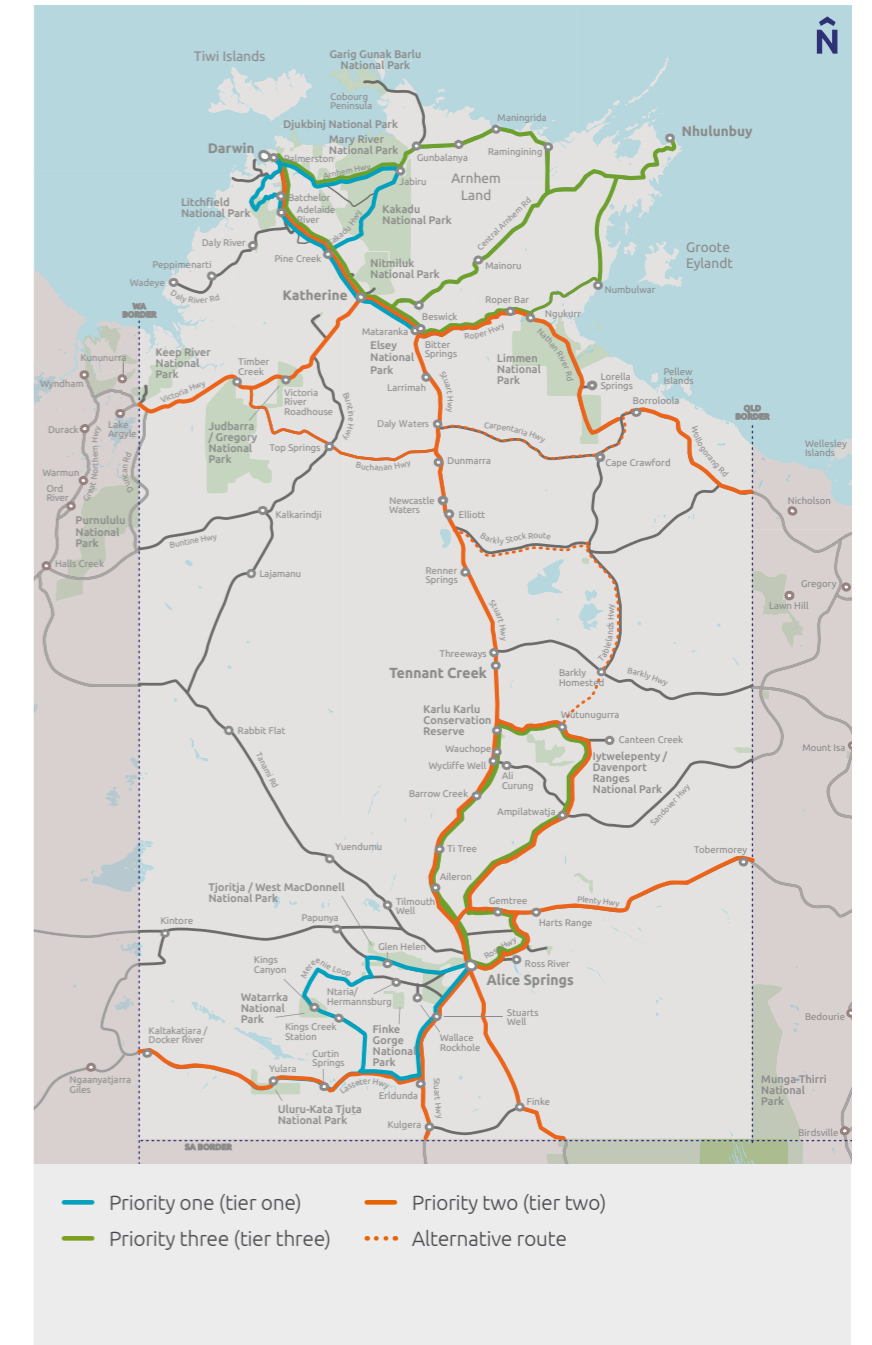
Priority two: development of select cross-border drive experiences, likely to deliver visitor experiences demanded by the market, including:

- Explorers Way, currently the most travelled cross-border drive
- Savannah Way, offering the most scenic drive experience connecting QLD and WA to the Top End. The future of this route should enhance the alternate route for 2WD vehicles.
- Outback Way, connecting eastern and western states, through the centre.

Whilst not marketed as a cross-border drive, the Binns Track will also be a priority two drive as a signature long-haul 4WD track.

Priority three: development of two longer loop drives, one in the Top End (Arnhem Land loop) and the other in Central Australia (East MacDonnell and Davenport Ranges loop). Significant consultation with land holders is required before either of these roads can be developed.

Figure 11: The future focus of Territory drive experiences.



¹⁷ Instinct and Reason, *Research on drive tourism NT*, September 2019



Priority drives

Priority one drives

Major road infrastructure investments are required to realise the full potential for priority one drives, namely sealing the remainder of the Mereenie Loop in Central Australia and sealing key roads in Kakadu National Park to increase wet and shoulder season visitation in the Top End.

Central Australia loop drive

Seal the Mereenie Loop

This drive has the potential to become a world-class visitor drive and an Australian signature drive route. These opportunities are well accepted within the tourism industry, however with over two decades of advocacy the outer loop still remains unsealed.

The biggest challenge the project faces is the achievement of an attractive return on investment when the tourism industry is perceived to be the only sector benefiting from the upgrade. Generally, road projects in the Territory are successful in attracting government funding where they support multiple industries and can generate broader economic benefit. However, this project has recently been listed as a priority tourism project in the TERC report, Tourism 2030 and both the Lasseter region and Alice Springs and MacDonnell Ranges DMPs; creating impetus for action.¹⁸

2021 Tourism NT figures forecast sealing the 'outer loop' would lead to an increase in average length of visitor nights by 0.1 nights to 4.5 nights. This would result in an increase in expenditure in the region by \$4.9 million per annum.¹⁹ As demand increases for traveller product in the area, the flow on effect, according to the tourism multiplier for the Territory, would be \$27.7 million per annum. Limited analysis has also been undertaken to assess economic benefits to the broader industry and other sectors operating in the region.²⁰

The increase in visitor numbers and nights will create opportunities for new tourism businesses, particularly Aboriginal businesses located on the loop drive. An added benefit will be the reduction in operational costs to tour operators using this road.

Further work is required to ensure Traditional Owner approval for the project, and to better understand economic impacts for industries beyond tourism. Opportunities exist for Aboriginal economic development

along this route, with Aboriginal tourism product being a key driver for domestic and international travel.

When complete, this road will meet all of the requirements of the priority fly-drive market.

Figure 12: Central Australian loop drive



Top End loop drive

Seal priority roads in Kakadu National Park to improve wet and shoulder season visitation and support improved site access in 2WD vehicles.

Improving access to key visitor sites in Kakadu National Park during the wet season would extend the tourism season, therefore attracting more visitors. The associated economic benefit of extending the season has been identified as a game changing opportunity. This Strategy aligns with the outcomes of the Kakadu Tourism Master Plan and supports improved access to the key visitor sites of Jim Jim Falls and the East Alligator region (Ubirr and Cahills Crossing) as priority investments. Secondary investment priorities are to improve access to Gunlom and Maguk. These projects are included in the TERC recommendations, Kakadu National Park Tourism Master Plan and Kakadu National Park Roads Strategy.²¹

To ensure the success of these developments, meaningful communication and support from Traditional Owner groups is needed.



Priority two drives

Kakadu National Park - Jim Jim Road

Jim Jim Falls is one of the most iconic waterfalls in Australia and is best experienced in its full glory during the wet season, however during this period can only be seen by scenic flight. If year round access was provided to a viewing platform, it would open opportunities for increased visitation during the wet and shoulder seasons.

Tourism NT forecasts the total tourism economic benefit would be \$5.3 million annually through this development.²²

Improvements to Jim Jim Falls access road will have further benefit by improving access to Twin Falls, another iconic waterfall in the region.

Kakadu National Park – Magela Creek upgrade

The East Alligator is one of the most visited tourist regions in Kakadu National Park, featuring Ubirr and Cahills Crossing. Ubirr is a major attraction providing visitor access to some of the Territory's most comprehensive Aboriginal rock art galleries and views over the spectacular Nadab floodplain. In recent years, Cahills Crossing has become one of the park's most visited sites, offering travellers a chance to see crocodiles at the infamous crossing. During the wet season, this region is often cut off due to flooding of the Magela Creek.

Developments would significantly increase wet and shoulder season visitation to Kakadu National Park and therefore the Top End during the usual low tourist season. Projected tourism economic benefit for the Magela Creek upgrades is \$1.4 million annually.²²

Access to Ubirr during the wet season could be a major drawcard for free and independent travellers and tour operators.

Future priorities for Kakadu National Park include sealing access to Gunlom and Maguk, to increase visitor appeal, safety and increase shoulder season visitation. These roads have been listed as priority projects in the Kakadu Roads Strategy, however, still require further consultation with Traditional Owners.

Priority two drives relate to key cross-border drive routes targeting long-haul visitors. These drives are established in the market and appeal to international and interstate visitors for their ability to tie in multiple regions and destinations. From a resourcing perspective, Tourism NT will continue to focus on drives that deliver the greatest return within the market, including Explorers Way, Savannah Way and Outback Way.

Marketing efforts to date have been largely focused on aspects of the drive that fit within the individual state and regions boundaries. Visitor appeal could be enhanced if neighbouring STOs and RTOs worked together to develop a coordinated marketing approach.

Master planning with neighbouring STOs with a focus on infrastructure and the visitor experience could also be undertaken to ensure major gaps in the drive experience are addressed.

There are currently signage issues along priority two drives. Tourism NT's position on future signage is detailed in this Strategy.

Figure 13: Top End loop drive



¹⁸ Tourism NT, Northern Territory Aboriginal Tourism Strategy 2030.

¹⁹ Tourism NT, Road Infrastructure Priorities for Tourism 2021-2022.

²⁰ Territory Economic Reconstruction Commission, Territory Economic Reconstruction Commission, published December 2020.

²¹ Parks Australia, Kakadu Tourism Master Plan 2020-2030.

²² Tourism NT, Road Infrastructure Priorities for Tourism 2021-22

Explorers Way

The Explorers Way is the most travelled cross-border drive route, and the Territory's key connector for the two largest domestic drive markets: Victoria and New South Wales. The route is also the key connector between Central Australia and the Top End, which could form a drive experience in its own right.

The base drive experience on the Explorers Way is established, however, investment is required to improve the experience and upgrade ageing infrastructure.

A key opportunity is to slow visitors down through enhanced visitor experiences and increasing the length of stay in regions. This could be achieved through activating quality visitor attractions such as heritage and cultural sites. Investment into roadhouses, particularly the accommodation, food and visitor service offerings, could also help to slow visitors and enhance their experience along the route. Tourism NT's Roadhouse to Recovery grant program aims to improve facilities at roadhouses across the Territory, however, ongoing investment and investment attraction will still be required. Tourism NT recognises that further investment is also required in major nodes along the Explorers Way, including Katherine and Tennant Creek, with these developments to be addressed through the DMPs.

Roadside stops along the Explorers Way require further investment, particularly improving amenities such as dump points, rubbish disposal and toilets. Investments should be strategically considered, factoring in visitors preference to stop every two to three hours and stops located at visually appealing locations or points of interest should be prioritised. Being the main arterial road of the Northern Territory, and given heavy use by road trains, trucks and caravans, ongoing analysis of the number and locations of overtaking lanes should be considered to increase road user safety.

Outback Way

The Outback Way, labelled Australia's longest shortcut, has recently been successful in securing road infrastructure funding that will see significant road improvements across WA, QLD and to the Plenty Highway in the NT. There is a long-term vision to seal this route in its entirety, providing a more direct connection from QLD to south WA via central NT and major icon Uluru-Kata Tjuta National Park.

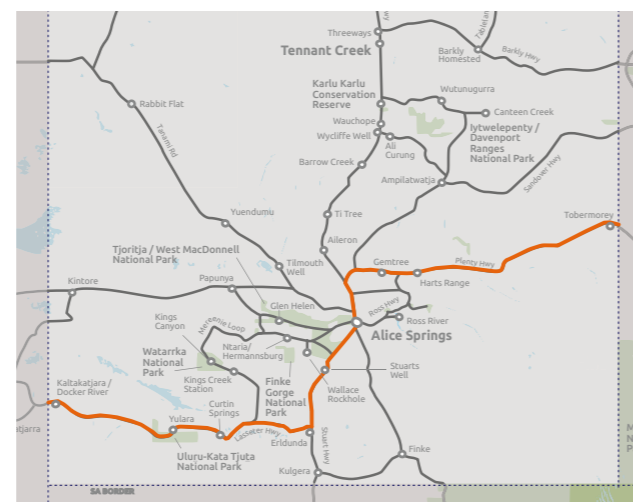
With future investment likely, there is an opportunity to encourage future visitor experiences through the DMP process. Further advocacy work, alongside neighbouring STOs and the Outback Highway Development Council will increase the likelihood of the road being sealed in its entirety.

This upgrade provides a strong position for development of new product, as recognised in the regional DMPs.

Figure 14: Explorers Way



Figure 15: Outback Way



Savannah Way

A scenic drive route, connecting Cairns to Broome via the Top End of the Territory, through the savannah landscapes, and including key sites such as Nitmiluk, Eley, Limmen, Keep River and Judbarra/ Gregory national parks. The Savannah Way is considered an iconic Australian drive, however it requires significant investment to upgrade roads and encourage new product, or renew the current product. Over recent years the drive experience has deteriorated primarily due to lack of coordination with WA and QLD STOs and declining road conditions.

The Savannah Way has historically been seen as an adventure drive, travelling long, challenging unsealed roads through Limmen National Park in the Territory and along the Gibb River Road in WA. Progressive sealing of roads in QLD, in addition to the recognition of alternative routes along the Great Northern Hwy in WA and the Carpentaria Hwy in the NT has increased the ability for this iconic drive to be marketed towards the 2WD market. For this route to become a mainstay 2WD alternative, sealing of the Woollogorang Road between Borrooloola and the QLD border would be required. Current plans to upgrade single lane bitumen along the Carpentaria Highway to dual lane, will also help grow this market.

Binns Track

Commencing at the South Australian border and concluding in Timber Creek, the Binns Track is the Territory's signature 4WD track from a marketing and development perspective. It passes through several regions, and connects to the Savannah Way, Outback Way and Explorers Way. This offers visitors an alternative adventure route on long-haul journeys, or the option of shorter side trips.

To enhance the appeal of the Binns Track, further investment is required. Product development to improve the visitor experience along the East MacDonnell Ranges and Iywelepeny/ Davenport Ranges National Park, including improvements to rest stops, signage and accommodation could greatly increase the appeal of the drive. This has been identified in the Barkly region DMP, and should be seen as the priority for this route.²³ Greater investment into the track, including curated 4WD side trips, could help to increase length of stay by breaking up long periods of travel on poorly maintained roads or travelling onto the Stuart Highway.

An opportunity identified during consultations was to create a new section of the Binns Track, reducing the amount of time spent on the Stuart Highway, turning it into a complete 4WD experience. This was considered during the development of the Binns Track, however was not possible due to significant infrastructure investment costs as well as the need for native title and pastoral lease holder approvals. Given the lapse in time since its development, it is worth revisiting.

Investment into developments along this route could re-establish the Savannah Way as a 'must do' great Australian drive.

Figure 16: Savannah Way

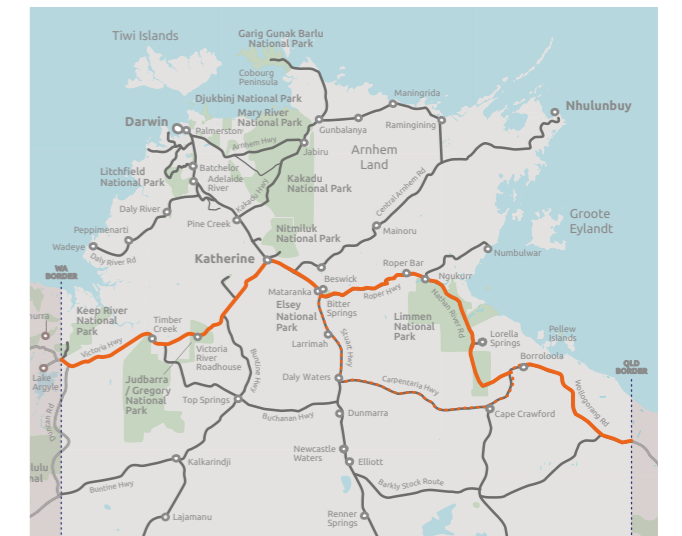
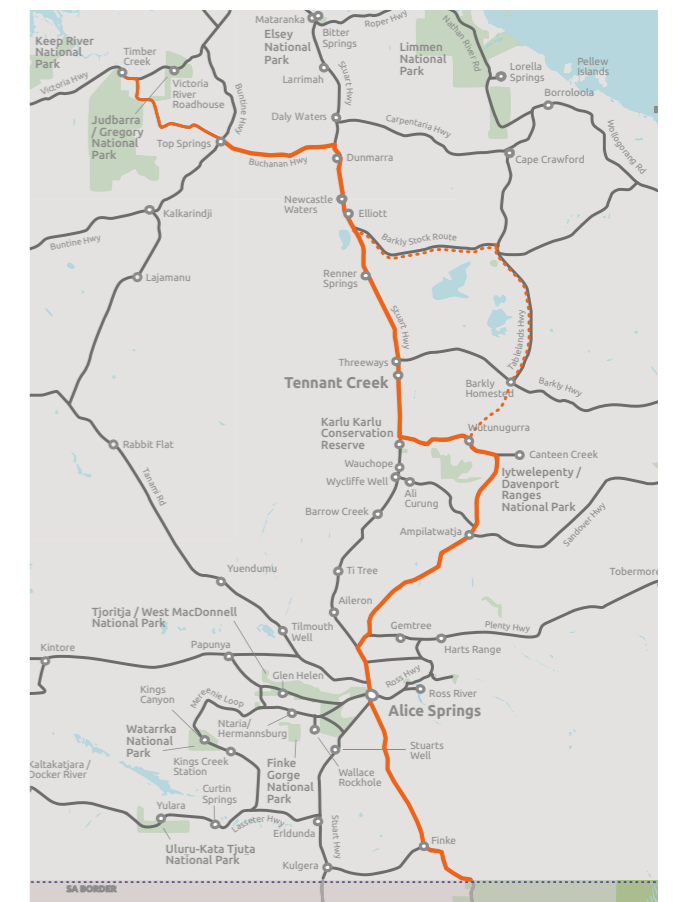


Figure 17: Binns Track





Priority three drives

Priority three drives focus on developing two longer loop drives, one in the Top End and the other in Central Australia. Developing two new loop drives will lead to repeat visitation from the drive market, by offering new experiences for return visitors to experience. Significant investments will be required to develop a secondary loop drive in the Top End through Arnhem Land, therefore investment is initially required into investigation and planning. A secondary loop drive in Central Australia will happen organically, should upgrades to the Binns Track and Outback Way occur, therefore further investments will be limited other than marketing.

Arnhem Land loop drive

From a tourism perspective, Arnhem Land is a highly desirable Aboriginal tourism experience and supports the Aboriginal Tourism Strategy vision 'for the Northern Territory to be the undeniable leader in the Aboriginal tourism sector'.²⁴ Development of an Arnhem Land loop drive experience could be a significant drive market opportunity in the future.

Tourism NT recognises this is a long-term vision, and considerable investment is required into further investigation of its feasibility.

Central Arnhem Road

Currently, funding commitments will see 30 percent of the Central Arnhem Road sealed or significantly improved, with a long-term vision to seal the road entirely, improving access to Nhulunbuy. Significant focus also needs to turn to working with pastoral lease holders and Traditional Owners to develop tourism product along this drive. The East Arnhem DMP and previous work undertaken by Developing East Arnhem Limited (DEAL) in road infrastructure requirements on the Central Arnhem Road will guide this process.

With travellers preferences for loop drives, and to reduce time on the same roads, finding an alternate route home could result in a significant drive market opportunity. This route would allow travellers to visit 'untouched' areas along the Territory's coastline and open up significant opportunities for cultural tourism.

There are two tracks, which if developed, would form to create an Arnhem Land loop drive with the Central Arnhem Road.

Top track

The top track would take travellers from Nhulunbuy to Jabiru, travelling along the northern coastline via Ramingining to Maningrida and then Jabiru, linking it to one of the Top End's greatest attractions. This route has the greatest visitor appeal, and passing through several Aboriginal communities, would create multiple Aboriginal tourism opportunities.

This road is regularly maintained and is in reasonable condition for a dirt road, however is not currently open to recreational traffic.

Figure 18: Arnhem Land loop drive options



South East Arnhem Land (SEAL) track

The SEAL track connects Nhulunbuy to Numbulwar and would require significant investment to improve road conditions, however would appeal to the 4WD market in its current state.

As upgrades are made to the Central Arnhem Road, the alternate routes become vital in maintaining a balance between ease of access and adventure throughout the region.

The work required is likely to extend beyond the life of this Strategy, however considerable progress can be made by 2030. Tourism NT, in partnership with DEAL is currently developing an East Arnhem Land Destination Management Plan, that will begin addressing key barriers, including essential product development required within Nhulunbuy and along the Central Arnhem Road. The DMP will look at land access requirements and permit access arrangements to support well-managed tourism on Aboriginal land in the region.



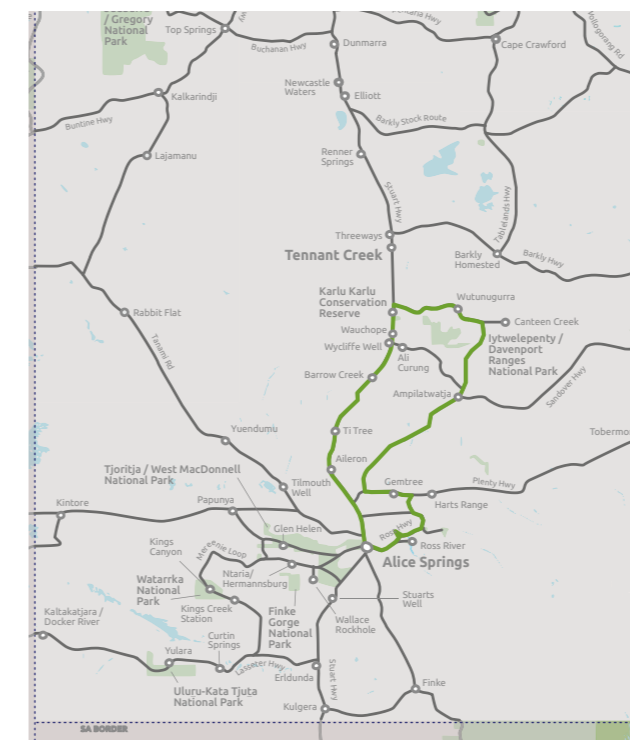
Further consultation will be required with Traditional Owners regarding visitor access and road developments to the top track and SEAL tracks. Funding will be required to bring these roads up to a general visitor standard and the key to securing funding from the Australian Government is by demonstrating the broader economic benefits beyond tourism. The SEAL track could be developed in its current state as a 4WD route for independent travellers or tour operators.

Broader benefits include improved supply chains and the creation of a larger economic zone between mainland communities and homelands that will support Aboriginal economic development in industries such as space, agriculture and forestry. Significant opportunities for Aboriginal economic development in commercial and recreational fishing can also be explored and supported through improved road networks. Tourism NT expects the majority of work undertaken during the life of this Strategy will be in addressing key barriers and determining the drives long term feasibility, for revision in subsequent drive strategy reviews.

East MacDonnell and Iytwelepenty / Davenport Ranges National Park loop

Priority two project investments to improve the Binns Track and Outback Way would benefit this loop drive. With these developments completed, limited investment would be required for this drive, other than marketing.

Figure 19: Priority three drives (Central Australia)



Uluru-Kata Tjuta National Park

²⁴ Tourism NT, Northern Territory Aboriginal Tourism Strategy 2020-2030.



Major infrastructure investments required across all priority drives

Digital activation

Activating the Territory through digital advancements is a key recommendation from the TERC report, to overcome barriers of remoteness and align the Territory with global digital standards.²⁵

From a tourism perspective, improving digital connectivity is a game changer for the industry. Advancements made would significantly improve the visitor experience, business operating environment and basic infrastructure such as signage.

Whilst a significant initial investment, it would create long-term economic gains through improved efficiencies and reduced maintenance costs. From a drive tourism perspective, improved digital infrastructure could:

- activate key visitor sites along drives, slowing visitors down to spend more time in regions
- improve visitor safety
- improve marketing through user shared media
- improve the overall visitor experience by creating ease of booking en route
- improve monitoring and reporting of visitor movement and spend through greater ability to capture visitor data
- reduce current issues faced with maintaining visitor signage
- improve businesses operating environments along drives
- create more liveable spaces for operators and staff moving to remote areas.

Tourism NT will support investments made to improve digital advancements along all priority drives with an initial focus on tier one drives and the Stuart Highway.

Signage

Signage provides critical infrastructure essential to the drive visitor experience. Currently, visitor signage in the Territory is poor, primarily due to limited funding and unclear responsibilities as to ongoing maintenance.

Tourism NT supports the use of National Tourist Signage Guidelines (National Guidelines), which outlines 'reliance on printed and electronic collateral is considered to be a better way to communicate the route'²⁶ as opposed to traditional hard-infrastructure signage.

Border welcome signs

Tourism NT funds the installation of welcome signs at key border entries, including on priority two drives.

Interstate tour routes

Tourism NT continues to support interstate tour routes. This will be done in line with the National Guidelines. Tour routes such as Savannah Way will have the identified signage at intersections, although this signage will no longer contain logos. These will be audited regularly and replaced as required by DIPL.

Binns Track

As required, the current Binns Track signage will be systematically removed and replaced with National Guidelines compliant signage to be maintained by DIPL. Safety will be the primary motivation for these signs.

Other signage

Groups such as NTG, Local Government and private industry install signs with no ongoing budget to maintain, resulting in large numbers of deteriorated signs across the Territory. Other than welcome to the Territory signs, Tourism NT does not have ownership of signage across the Territory, though have previously used funding to install signs. New signage should be owned by the interested party, and requirements should be put on those parties to ensure they are maintained. Tourism NT can provide creative support to Local Governments or other bodies to develop tourism signage, such as town centre signs. Payment for the signs and ongoing maintenance of the signs will be at the cost of the requesting organisation.

Book ends and route interpretation

Book ends and significant signage such as the Red Centre Way markers that are currently in place will remain, however new bookends will not be installed. Current infrastructure will remain until it is no longer in sufficient condition and a decision will be made to remove or replace the sign, dependent on surrounding infrastructure.



Visitor experience

Considerable visitor experience investments are required into all drives, including training and development. These investments will be undertaken in line with regional DMPs, however there are several visitor experience improvements that are required to improve the overall drive tourism experience.

Improve the visitor experience in Kakadu National Park and Uluru-Kata Tjuta National Park.

Kakadu National Park and Uluru-Kata Tjuta National Park are two iconic destinations, or 'jewels' in the Territory's drive tourism offering. Therefore, the parks' ability to deliver experiences that meet and exceed the needs of the drive market is vital to the success of this Strategy.

It is broadly accepted the visitor experience offering in these parks needs further investment, as identified in the TERC report and Kakadu National Park Tourism Master Plan.^{27,28} It is also accepted these parks play a vital role in delivering authentic Aboriginal cultural tourism experiences demanded by the market.²⁹

Kakadu National Park and Uluru-Kata Tjuta National Park are governed by the Australian Government and therefore have different operating and political structures to other Territory national parks. This presents opportunities and challenges for the Northern Territory Government. Tourism NT will continue to focus on strengthening its strategic partnership with Parks Australia as a priority action.

Development of sectors

Food and drink

The fly-drive and international markets are seeking quality dining experiences and meals featuring local (Territory) fresh seasonal produce, served by trained staff. Currently, there is a market push for paddock to plate and local produce.

Dining, both casual and formal, is a key aspect of touring routes and as such impacts visitor satisfaction considerably. Quality coffee prepared by trained baristas is now expected and anticipated.

Specialty foods from the Territory such as camel, crocodile, buffalo, barramundi, prawns and mud crabs should be featured on menus, particularly combined with Aboriginal cooking methods and ingredients. These would deliver a unique 'only in the Territory' memorable experience. Food offerings could be regionally specific, creating a food journey for travellers along drives.

History and heritage

History and heritage sites can enrich route journeys and enhance the visitor experience.

Major economic enterprises located in key visitor regions can be encouraged to support heritage and historic sites

as part of their community corporate responsibilities. Such companies can provide both financial and physical assistance to enhance sites and the visitor experience.

Technology is the key to activating historic sites. Technology can connect the history of the site to specific families and individuals thus making a visit a special personal journey.

Further to this, the Territory's current major project sites could in themselves provide a quality visitor experience particularly if combined with guided tours and immersive educational experiences.

To realise the activation of many remote sites, solutions can be sought through existing and emerging technologies. Drives catered to particular history and heritage sectors could be explored, linking regions and creating a 'story' along the journey.

Culture

The proposed National Aboriginal Art Gallery in Alice Springs offers a significant opportunity to link other regional art centres, further enhancing the Territory Art Trails as part of the drive tourism experience.

Recognition of the many different Traditional Owner groups could also assist in providing visitors with a sense of the world's longest living culture.

Tourism NT will continue to focus on developing Aboriginal businesses and recognises drive routes can support micro enterprise development. This work will be undertaken through the Aboriginal Tourism Strategy.

As more Aboriginal lands and communities move into tourism, it is essential that public facilities and road infrastructure meet the demand.

Adventure

The Binns Track has the potential to become a signature 4WD adventure track with curated experiences and designed 4WD challenges.

Improved access within Kakadu National Park could open up wet season visitation to adventure travellers seeking a unique experience currently off limits to the drive market. Many NT parks offer 4WD and adventure activities, such as hiking and mountain biking. Increased marketing of adventure and 4WD possibilities would help to further promote the Territory to the adventure market.

Improved telecommunication coverage enhances safety and security for those undertaking adventure tourism, providing reassurance to travellers.

Emerging visitor experiences

Developments across new industry sectors in the Territory have opened up new experience opportunities, including: energy production, aquaculture, space technology, mining and farming.

²⁵ Territory Economic Reconstruction Commission, *Territory Economic Reconstruction Commission: final report*, published December 2020.

²⁶ National Tourism Signing Reference Group, *National Tourist Signage*, June 2012.

²⁷ Territory Economic Reconstruction Commission, *Territory Economic Reconstruction Commission: final report*, published December 2020.

²⁸ Parks Australia, *Kakadu Tourism Master Plan 2020-2030*, published November 2020.

²⁹ Tourism NT, *Northern Territory Aboriginal Tourism Strategy 2020 – 2030*.

Marketing to support

Tourism NT continue to offer a range of marketing resources and opportunities to support drive tourism.

Drive options, routes and itineraries of various duration are featured on Tourism NT's consumer website and continue to be the primary call to action for consumer marketing campaigns.

In the short term, Tourism NT will primarily focus on marketing 3 to 10 day loop itineraries out of Darwin, Alice Springs and Yulara to specifically target the fly-drive market. This will be particularly important in targeting returning international visitors. Tourism NT will also focus on developing improved long-haul drive itineraries for the Explorers Way, Savannah Way and Outback Way. Tourism NT will strategically target the high yield domestic market, in an attempt to minimise the impacts of temporarily reduced international numbers.

Tourism NT will continue to work with partners in domestic and international travel trade, airlines, vehicle rental companies and accommodation providers to package and promote the Territory's drive tourism experiences to align with drive marketing campaigns.

The established 'Different in every sense' brand positioning will be used to present the unique visitor drive experience. This will be guided by new imagery and video content to better reflect the experience.

Tourism NT will work closely with neighbouring State Tourism Organisations (STOs) and Tourism Australia to stimulate travellers to promote cross-border travel routes and include the NT in their next drive holiday. Existing cross-border branded routes, Savannah Way, Explorers Way and Outback Way will be supported with a greater focus on coordination and partnership support with neighbouring STOs. In consultation with industry, intra-Territory branded routes will be reviewed and itineraries will be updated to highlight icons and destinations, better meeting the needs of self-drive markets.

Consumer social media will be a major focus in promoting drive tourism in the Territory, particularly encouraging conversations and creating positive user generated content. In partnership with local operators, Tourism NT will coordinate familiarisation trips for media, travel trade and influencers that will appeal to the key targeted drive market sectors.

Tourism NT will continue to support RTOs to develop and deliver drive marketing initiatives and activities where there is a clear return on investment and agreed key performance indicators are met.

Current attendance at caravan and camping consumer shows and the development of maps and brochures targeting the drive market will be reviewed in light of new technology, new distribution pathways, the changing needs of the drive market and the new drive experiences proposed.

Further marketing partnerships will be explored and established with industry, particularly those major stakeholders supporting the drive market such as rental vehicles, holiday parks, airlines and accommodation providers.



Katherine street art

Action plan



Exploring - Litchfield National Park



Action plan strategic pillars

Significant work is required to be able to achieve the market, infrastructure and product priorities. To guide the outcomes of this Strategy, an action plan has been developed under four strategic pillars:

Strategic pillars

1 Enabling infrastructure

Infrastructure that meets and exceeds the needs of the drive market.

2 Better together

Strengthen partnerships to deliver our vision.

3 Digitally enabled

Enhancing the visitor experience through digital technology will be a game changer for the Territory.

4 Marketing

Enhancing the Territory's brand reputation and encouraging new visitor markets.



Driving - Owen Springs Reserve

For the Strategy to be successful, all pillars need to work simultaneously, to enhance visitor appeal for the key priority markets at the right time.



Enabling infrastructure

Strategic objective:

Develop road, signage and accommodation infrastructure along key loop and cross-border drives that meets the needs of future markets and grows the value of drive tourism.

Our initiatives:

Roads

Priority one: highest priority road developments that enhance key loop drives out of Darwin and Alice Springs to target the fly-drive market.

Priority two: cross-border drives targeting long-haul market (Savannah Way, Explorers Way, Binns Track and Outback Way).

Priority three: develop two longer loop drives, targeting repeat visitation through new drive experiences.

Other infrastructure

Enhance infrastructure that supports new drive routes, product development and enhanced visitor experience.

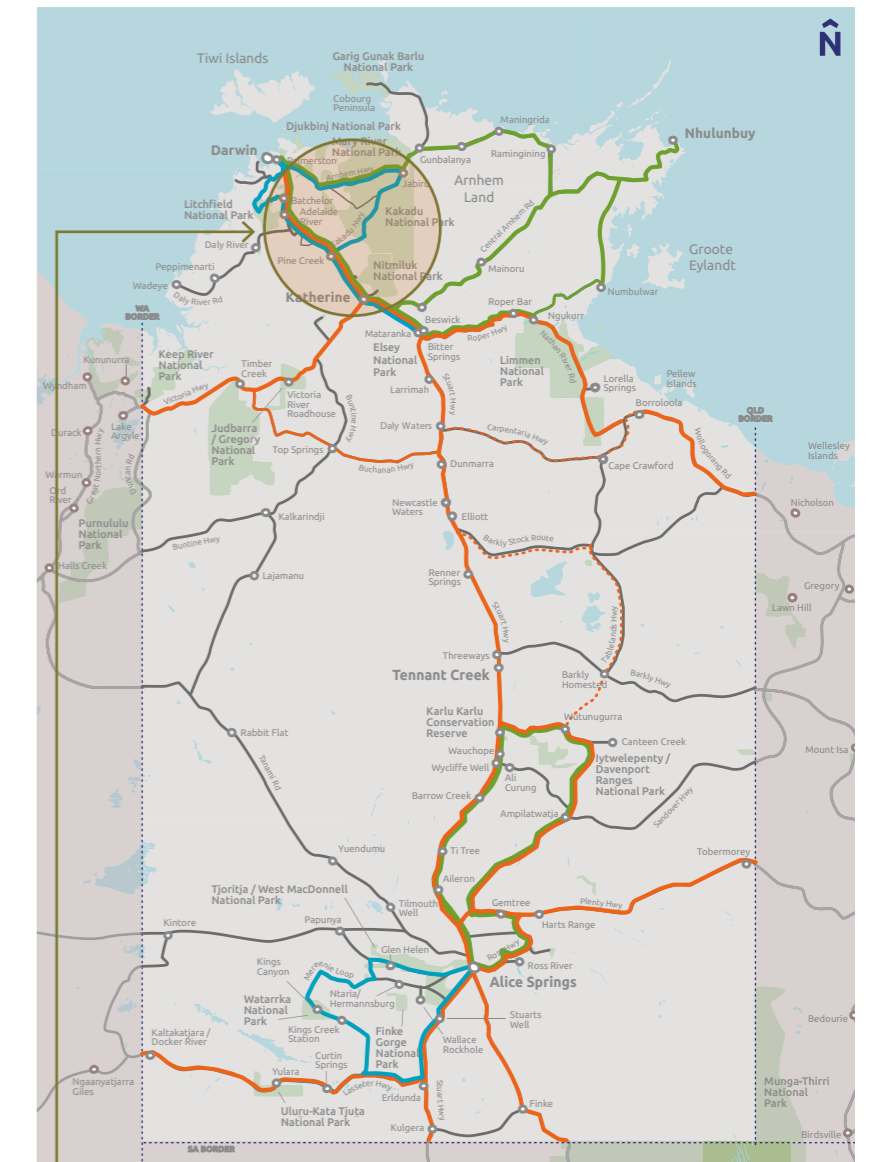
New technologies

Assess new technologies to increase reliable data collection in regional areas to better inform policy and marketing activities.

Game changers

- Seal the remainder of the Mereenie Loop.
- Seal priority roads in Kakadu National Park. Initial roads to improve wet and shoulder season access.
- Create an Arnhem Land loop drive, through improving access along the Central Arnhem Road, top track and South East Arnhem Land (SEAL) track.

Figure 20 – Road priorities



Kakadu National Park

Priority one roads - Jim Jim Road and Magela Creek upgrades.

Aim - to increase wet and shoulder season visitation to the key visitor sites of Jim Jim Falls and Ubirr.

Priority two roads - Gunlom and Maguk roads.

Aim - to improve accessibility of two key visitor sites.

- Priority one
- Priority two
- Priority three
- Alternative route



Lead	Partner	Action	Outcome	Growth	Dispersal	LOS*
TNT	DIPL PITs Land Owners ALCs	1. Undertake tourism economic benefit analysis for upgrades to all priority 1, 2 and 3 drives. Develop business cases for those with good ROI, including identification of other benefactors of development (mining, agriculture etc) and consultation with land owners.	<ul style="list-style-type: none"> enhanced ability to advocate for NTG and Australian Government funding enable Tourism NT to prioritise individual projects allow businesses to diversify their operations further identify target markets for individual drives and expected facilities. 	X	X	X
TNT	DIPL Land Owners	2. In line with action 1, identify points of interest along the Binns Track to form curated 4WD experiences. Investigate alternate routes, to reduce time spent on the Stuart Highway.	<ul style="list-style-type: none"> enhanced visitor experience. 	X	X	
DIPL	TNT	3. Develop standards for roadside stop infrastructure facilities, taking into account traveller preferences, as well as needs. Focus on roadside stops for new road developments, high traffic routes and priority drives.	<ul style="list-style-type: none"> enhanced visitor experience improved road safety. 	X	X	X
TNT	DIPL PS LG	4. Develop tourism standards for Territory towns, providing guidance based on identified markets (including RV and freedom camper market).	<ul style="list-style-type: none"> enhanced visitor experience. 	X	X	X
DIPL	TNT	5. Develop and implement Electric Vehicle Strategy and Implementation Plan. Tourism NT to provide input into strategic charging station locations and provide marketing support.	<ul style="list-style-type: none"> meet the requirements of future markets increase the Territory's appeal as a sustainable destination. 	X		
TNT	DIPL PITs	6. Tourism NT to provide tourism road priorities to DIPL on an annual basis or as required.	<ul style="list-style-type: none"> increased tourism input into road priorities. 	X	X	
TNT	DIPL AG PITs	7. DIPL to provide updates to TNT on new road infrastructure developments as they occur. Tourism NT to update relevant DMP PITs on these conversations, where appropriate.	<ul style="list-style-type: none"> better coordination of road infrastructure. 	X	X	
DIPL	TNT	8. Undertake a review and upgrade of all tourism wayfinding and visitor information and interpretation signage on developed drive routes. Once deteriorated, remove drive route signs with logos and replace with National Signage Guideline compliant wayfinding signs. Remove deteriorated visitor information and interpretation signs.	<ul style="list-style-type: none"> clearer responsibilities for signage infrastructure reduced cost of replacing signs enhance visitor safety improve visitor experience. 		X	

* Length of stay



Better together

Strategic objective:

Focus on partnerships that are critical in delivering a visitor experience demanded by the market.

Our initiatives:

Access to the Territory: making trips to the Territory easier for visitors.

Experience within the Territory: giving visitors an experience that exceeds expectations.

Grow the market: attracting more drive visitors to the Territory.

The success of the strategy will rely on key partnerships in order to deliver a drive experience that will lead to sustained economic growth into the future.

Game changers

- Enhance the visitor experience in national parks.
- Streamline visitor experience on drive routes crossing state borders.
- Enhance access to tourism sites in the Territory.

Actions:

Lead	Partner	Action	Outcome	Growth	Dispersal	LOS*
RTOs	TNT PS	1. Develop multilingual road safety information for distribution by operators (e.g. hire companies, accommodation providers etc), including telecommunications black-spot zones, road rules, information on driving conditions, what to carry etc.	<ul style="list-style-type: none"> increased confidence of travellers to visit regional areas increased traveller safety. 		X	X
TNT	STOs RTOs	2. Tourism NT to work with Tourism Australia to increase cross-border drive route content on <i>australia.com</i> .	<ul style="list-style-type: none"> seamless travel for visitors along cross-border drives enhanced visitor experience. 	X	X	
TNT	STOs	3. Tourism working groups to be established for major cross-border drive routes. Working groups to develop coordinated infrastructure development and a coordinated marketing approach. Working groups to advocate for infrastructure developments across the whole drive.	<ul style="list-style-type: none"> seamless travel for visitors along cross-border drives better coordination between STOs enhanced bargaining power for major infrastructure developments. 	X	X	X
RTOs	TNT	4. Provide insights to the vehicle rental industry on market trends.	<ul style="list-style-type: none"> enhanced visitor appeal increased capacity to meet demand. 	X		
TNT	Airlines	5. Work with airlines to secure flight routes and encourage flexible policies for re-booking and cancellations.	<ul style="list-style-type: none"> enhanced visitor confidence to travel supporting growth of the fly-drive market. 	X		

* Length of stay



Lead	Partner	Action	Outcome	Growth	Dispersal	LOS*
TNT	RTOs ALCs	6. Tourism NT to work collaboratively with Land Councils to encourage streamlined visitor permits.	<ul style="list-style-type: none"> better meet needs of visitor markets increased numbers of visitors to Aboriginal lands increased compliance create more product opportunities, encouraging repeat visitation. 	X	X	X
TNT	ALCs	7. In line with Aboriginal Tourism Strategy, continue to work with Aboriginal Land Owners and Aboriginal Land Councils to identify and progress tourism opportunities, and work through barriers to development. To be reported against ATS and DMPs	<ul style="list-style-type: none"> better meet needs of visitor markets increased product regional development. 	X	X	X
TNT	DIPL Cattleman's Association NT Farmers	8. Partnering with industry associations, educate pastoral leaseholders around tourism opportunities and requirements to run tourism ventures.	<ul style="list-style-type: none"> improved outcomes for regional areas increased regional product allow businesses to diversify their operations. 	X	X	X
TNT	LG LGANT	9. Tourism NT to facilitate education to Local Governments on their role in tourism, and encourage the development of supportive tourism policies.	<ul style="list-style-type: none"> improved outcomes for regional areas improved visitor experience. 		X	
TNT	DIPL	10. Tourism NT to support product development priorities in line with target markets and drives. To be reported against DMPs.	<ul style="list-style-type: none"> better meet needs of market enhanced efficiency. 		X	X
DEAL	TNT ALCs	11. Guided by local consultation, investigate priority drives in East Arnhem Land to identify tourism appeal and the regions comparative advantages. Identify product opportunities in line with developments.	<ul style="list-style-type: none"> enhanced visitor experience Aboriginal economic development opportunities. 	X	X	X
TNT	PITs	12. Provide plan of action for all DMP product opportunities that link across regions targeting priority markets e.g. upgrades to accommodation along all drive routes, history and heritage trail development etc. To be reported against DMPs.	<ul style="list-style-type: none"> enhanced visitor experience streamlined visitor experience new product offerings. 	X	X	X

* Length of stay



Lead	Partner	Action	Outcome	Growth	Dispersal	LOS*
TNT	RTOs PS	13. Tourism NT to work with operators on prioritised drives with identified sector themes, to enhance coordination and product in line with theme. To be reported against DMPs.	<ul style="list-style-type: none"> better coordination and flow of product enhanced visitor experience. 	X	X	X
TNT	DITT RTOs Hospitality NT PS	14. Tourism NT to work across government and with key stakeholders to address tourism workforce shortages, especially in regional and remote tourism businesses.	<ul style="list-style-type: none"> enhanced visitor experience. 			X

* Length of stay



Driving - Tjoritja/West MacDonnell National Park



Digitally enabled

Strategic objective:

Enhance the visitor experience through digital technology.

Our initiatives:

Safety: we will address visitor safety concerns by keeping visitors digitally connected on key drives.

Experience: we will improve the drive experience through digital activation.

Marketing: we will target priority markets and accurately inform visitors of the drive experience.

Key initiatives:

- invest in 4 to 7 day itineraries out of Darwin, Alice Springs and Yulara. This includes partnering with travel trade to develop inclusive packages supported by new imagery to showcase icons.
- ensure key loop and long-haul drives have mobile phone coverage, addressing visitor safety concerns and improving the visitor experience.
- enhance the visitor experience along key drives focusing on the three key elements: destinations, journey and icons.

Game changers

Digitally connect all key drives.

Accelerate mobile coverage on the two key loop drives out of Darwin and Alice Springs, and the Stuart Highway.



Binns Track - Central Australia



Actions:						
Lead	Partner	Action	Outcome	Growth	Dispersal	LOS*
TNT	PITs DCDD DIPL	1. Develop tourism telecommunications infrastructure priorities plan to inform DCDD and the Australian Government of telecommunications priorities.	<ul style="list-style-type: none"> improved telecommunications for visitors increased visitor safety better visitor information and bookability. 	X	X	X
TNT	DIPL RTOs	2. Tourism NT to encourage new technologies to enhance and supplement the use of traditional signage, for wayfinding and visitor interpretation purposes.	<ul style="list-style-type: none"> reduced upkeep and maintenance costs enhanced visitor experience. 		X	X
TNT		3. Tourism NT will investigate new technologies to measure and monitor travel patterns, visitor expenditure and visitor sentiment.	<ul style="list-style-type: none"> enhanced visitor data. 	X	X	X
TNT	PS RTOs	4. Provide insights to the vehicle rental industry on market trends.	<ul style="list-style-type: none"> greater consumer reach enhanced brand appeal. 	X	X	X
PA PW	TNT	5. Tourism NT to support PA and PW to provide online booking systems for national parks admission and camping fees.	<ul style="list-style-type: none"> increased ease of booking for consumers greater consumer reach enhanced compliance. 	X	X	
TNT	RTOs	6. Work with domestic and international travel trade to ensure product is up to date and bookable drive itineraries are available.	<ul style="list-style-type: none"> greater consumer reach enhanced brand appeal. 	X	X	X
TNT	LGANT LG	7. Provide templates of creative assets to local governments, Aboriginal corporations and other public interest organisations for wayfinding and interpretation signage in public areas.	<ul style="list-style-type: none"> enhanced upkeep of signage in public areas reduced costs to identified organisations increased product. 			X

* Length of stay



Marketing

Strategic objective:

Enhancing the Territory's brand reputation and increasing visitor numbers.

Our initiatives:

Marketing: will target priority markets and accurately inform visitors of the drive experience.

Experience: to enhance consumer reach and improve brand reputation.

Key initiatives:

- updating drive itineraries to reflect the entire drive route and experience.
- utilise social media to share stories and imagery of drives.

Game changers

Work with neighbouring STOs to collaborate on whole of journey marketing for cross-border drives.



Driving - Central Australia



Actions:

Lead	Partner	Action	Outcome	Growth	Dispersal	LOS*
TNT		1. Ensure tourism imagery is reflective of the entire drive route and experience.	<ul style="list-style-type: none"> enhanced brand reputation. 	X	X	X
TNT	DIPL RTOs	2. Tourism NT to continue marketing partnerships with industry, particularly those major stakeholders supporting the drive market such as rental vehicles, holiday parks, airlines and accommodation providers.	<ul style="list-style-type: none"> enhanced brand reputation greater consumer reach. 	X		
TNT		3. Tourism NT to investigate non-traditional product partnerships and determine ROI e.g. credit card companies, car manufacturers etc.	<ul style="list-style-type: none"> enhanced brand reputation greater consumer reach. 	X		
TNT	PS RTOs	4. Ensure the drive market campaign material and collateral align to the short, medium and long term market priorities identified in the Strategy.	<ul style="list-style-type: none"> enhanced appeal for drive visitors enhanced spend. 	X	X	X
PA PW	TNT	5. In consultation with industry, intra-Territory branded routes will be reviewed and itineraries updated to highlight icons and destinations, which better meets the needs of the self-drive markets.	<ul style="list-style-type: none"> enhanced visitor experience enhanced brand reputation. 	X	X	X
TNT	RTOs	6. In partnership with local operators, Tourism NT will coordinate familiarisation trips for media, travel trade and influencers that will appeal to the key target drive market sectors.	<ul style="list-style-type: none"> enhanced brand reputation. 	X	X	
TNT	LGANT LG	7. Increase consumer social media in promoting drive tourism in the Territory, particularly encouraging conversations and positive user generated content.	<ul style="list-style-type: none"> enhanced brand reputation. 	X	X	X
TNT	LGANT LG	8. Review support for attendance at caravan and camping consumer shows, with a focus on ROI.	<ul style="list-style-type: none"> enhanced value for money. 	X	X	X
TNT	LGANT LG	9. Work with neighbouring STOs, RTOs and stakeholder organisations to collaborate on cross-border drive marketing.	<ul style="list-style-type: none"> seamless connection for drives between states enhanced visitor appeal. 	X	X	X

* Length of stay

Monitoring success

The success of the Strategy will be measured against the key pillars:

- grow visitor numbers
- improve regional dispersal
- increase length of stay.

Increased regional dispersal will be difficult to measure in the early years of the Strategy. Actions outlined in the plan aim to assist in collecting greater regional dispersal data, which will be of benefit in subsequent reviews.

The nine year timeframe for the Strategy establishes the need for regular monitoring and evaluation of its effectiveness. This will include annual progress reports.

To enhance tourism outcomes, collaboration is required across the public and private sectors. The Strategy will be reviewed every three years to ensure stakeholders are given the opportunity to provide feedback and contribute to growth in the drive sector. These reviews are also important to ensure the Strategy remains relevant and aligned to changes in the drive market, ensuring targets can be achieved.



Dirt roads - East Arnhem Land

Acronyms

2WD	Two-wheel drive
4WD	Four-wheel drive
AG	Australian Government
ALCs	Aboriginal Land Councils
ATS	Aboriginal Tourism Strategy
AV	Average
AWD	All wheel drive
DEAL	Developing East Arnhem Limited
DCDD	Department of Corporate and Digital Development
DIPL	Department of Infrastructure, Planning and Logistics
DITT	Department of Industry, Tourism and Trade regional offices (excluding Tourism NT)
DMP	Destination Management Plan
EV	Electric vehicles
LG	Local government
LGANT	Local Government Association of the Northern Territory
LOS	Length of stay
NSW	New South Wales
NT	Northern Territory
NTG	Northern Territory Government
PA	Parks Australia
PIT	DMP Project Implementation Team
PS	Private sector
PW	Parks and Wildlife NT
QLD	Queensland
RTO	Regional Tourism Organisation
SA	South Australia
SEAL	South East Arnhem Land
STO	State Tourism Organisation
TA	Tourism Australia
TERC	Territory Economic Reconstruction Commission
TNT	Tourism NT
Tourism 2030	NT's Tourism Industry Strategy 2030
TRA	Tourism Research Australia
UK	United Kingdom
VFR	Visiting friends and relatives
VIC	Victoria
WA	Western Australia



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