Top End Regional Report

Year Ending December 2025

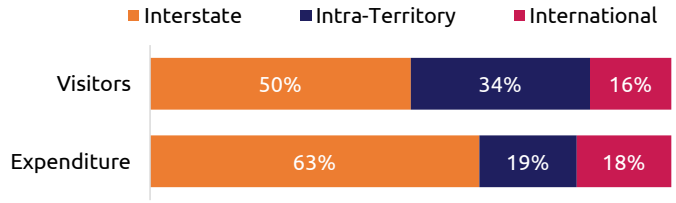
TOURISM & EVENTS NORTHERN TERRITORY

Key Measures

TOTAL VISITORS	AVERAGE NIGHTS	AVERAGE SPEND PER TRIP	HOLIDAY	VISITING FRIENDS AND RELATIVES	BUSINESS
939,000	7.2	$1,597	384,000	172,000	268,000

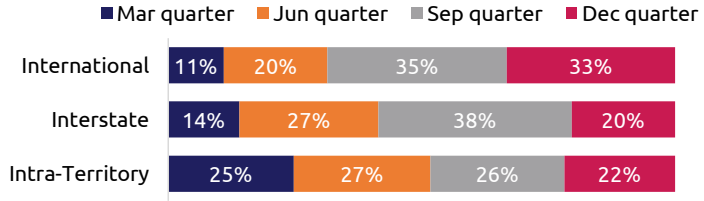
Origin	Visitors ('000)	Visitor nights ('000)	Spend ($M)	Average length of stay (nights)	Average spend per trip	Visitor market share of NT
Domestic	793	3,215	$1,227M	4.1	$1,548	80%
International	146	3,512	$272M	24.0	$1,861	57%
Total	**939**	**6,727**	**$1,500M**	**7.2**	**$1,597**	**75%**

Origin



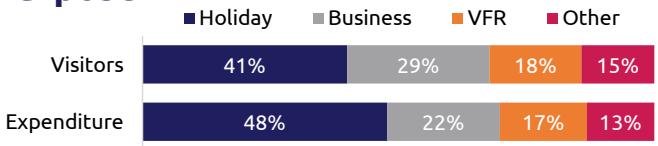
- **Interstate visitors remain the primary market for the Top End**, making up half of visitors and almost two thirds of spend.
- **Intra-Territory visitors made up over a third of visitation** but under a fifth of spend.
- **International visitors contributed around 16%** of visitation and of spend.

Seasonality



- **International visitation to the Top End is strongest in the second half of the year,** with over 2 in 3 international visitors travelling in the September or December quarter.
- **Interstate visitation peaks in the September quarter** in line with the peak season and school holidays.
- **In contrast, intra-Territory visitation is relatively consistent** throughout the year.

Purpose



Holiday Visitors

Origin	Visitors ('000)	Visitor nights ('000)	Spend ($M)	Average length of stay (nights)	Average spend per trip
Interstate	195	894	$468M	4.6	$2,398
Intra-Territory	104	233	$88M	2.2	$839
Domestic	299	1,126	$555M	3.8	$1,854
International	85	1,260	$162M	14.8	$1,901
Total	**384**	**2,387**	**$717M**	**6.2**	**$1,865**

- **Holiday was the leading purpose of travel to the Top End,** contributing almost half of total visitation and spend, closely followed by business which accounted for around a quarter of visitation and spend.
- **On average, interstate holiday visitors spent almost $2,400 per trip,** significantly more than intra-Territory and international counterparts.
- **Despite lower visitation compared to domestic visitors,** international holiday visitors contribute slightly more visitor nights, resulting in an average stay almost 4 times that of domestic visitors.

Source: International Visitor Survey and Domestic Tourism Statistics – Year Ending December 2025



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Source Markets

International Market	Visitors ('000)	Visitor nights ('000)	Spend ($M)	Average length of Stay	Average Spend Per Trip
International					
United Kingdom	16	277	$32M	17.5	$2,037
United States	15	256	$23M	17.1	$1,543
New Zealand	12	132	$24M	10.7	$1,925
France	8	166	$15M	20.3	$1,777
Germany	8	84	$14M	10.5	$1,762
Domestic*					
Intra-Territory	323	819	$280M	2.5	$868
Interstate	470	2,395	$947M	5.1	$2,014

** Data for state and territory source markets not available due to low sample size.*

- **The United Kingdom was the Top End's largest overseas market (16,000 visitors)**, with the highest average spend per trip of over $2,000. The United States followed closely with 15,000, but had the lowest spend per trip of the top five markets ($1,543).
- **With fewer visitors, New Zealand generated more spend than the US** ($24M vs $23M), driven by a high average spend per trip ($1,925). France recorded the longest average stay, at over 20 nights.
- **Interstate visitors made up 59% of domestic visitors but over three quarters of domestic spend (77%).** They stayed twice as long as intra-Territory visitors and spent more than double per trip ($2,014 vs $868).

Top End Sub Regions



The Top End tourism region comprises the following regions:

- **Darwin:** City of Darwin, City of Palmerston, Noonamah, Humpty Doo, Fogg Dam, Gunn Point and Mandorah.
- **Litchfield Kakadu Arnhem:** Alligator, Tiwi Islands, West Arnhem, Anindilyakwa, East Arnhem and Nhulunbuy.
- **Katherine Daly:** Katherine, Daly, Thamarrurr, Elsey, Gulf and Victoria River.

- **Darwin was the main hub of the Top End, attracting around 80% of visitors** (769,000) and spend (almost $1.2 billion). Over 4 in 5 visitors were domestic, driven by interstate visitors.
- **Darwin also recorded the highest average spend per trip** of all the sub-regions, at around $1,540, and captured almost 90 cents of every international dollar spent in the Top End.
- **Litchfield Kakadu Arnhem and Katherine Daly rely on domestic visitors,** who account for around 90% of visitation and spend in each sub-region.

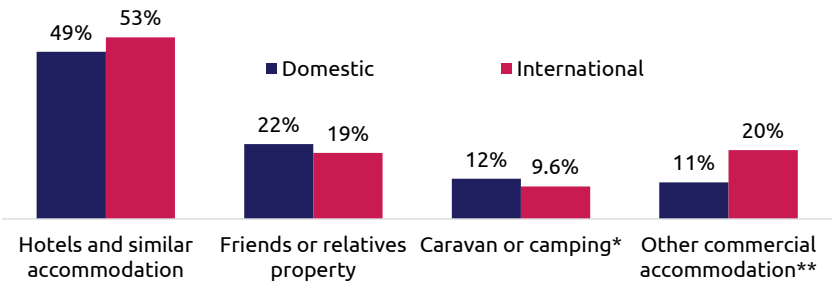
Origin	Visitors ('000)	Visitor nights ('000)	Spend ($M)	Average length of stay (nights)	Average spend per trip	Visitor market share of Top End
Darwin						
Domestic	626	2,501	$937M	4.0	$1,498	67%
International	143	3,060	$244M	21.3	$1,700	15%
Total	**769**	**5,561**	**$1,181M**	**7.2**	**$1,536**	**82%**
Litchfield Kakadu Arnhem						
Domestic	156	367	$158M	2.4	$1,014	17%
International	17	188	$15M	11.3	$893	1.8%
Total	**172**	**555**	**$173M**	**3.2**	**$1,003**	**18%**
Katherine Daly						
Domestic	131	346	$132M	2.6	$1,008	14%
International	22	265	$14M	12.1	$637	2.3%
Total	**153**	**611**	**$146M**	**4.0**	**$955**	**16%**

Source: International Visitor Survey and Domestic Tourism Statistics – Year Ending December 2025

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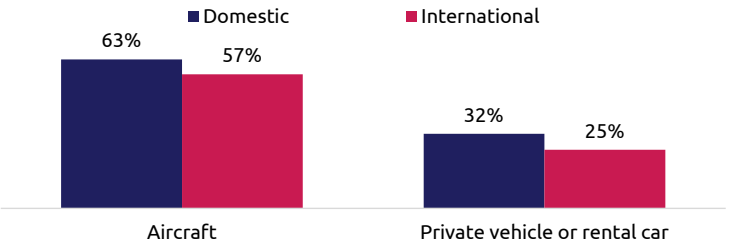
Accommodation



** Caravan or camping relates to commercial and non-commercial*
*** Other commercial accommodation mainly includes guest house or bed and breakfast, rented house/apartment/flat or unit, backpacker or hostel*

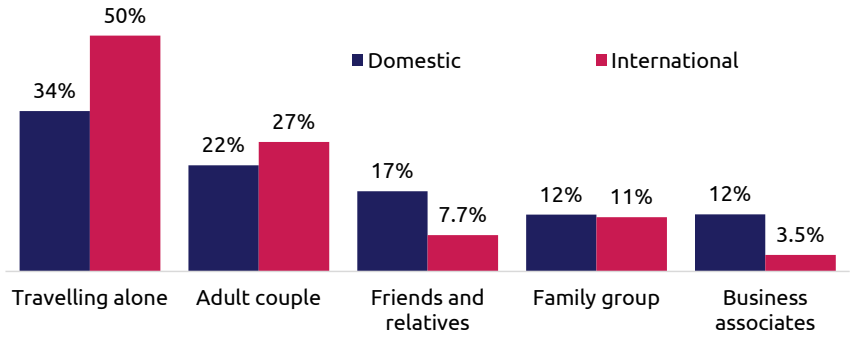
- **Domestic and international visitors share similar accommodation preferences,** with around half staying in a hotel or similar accommodation.
- **Around 1 in 5 domestic and international visitors stayed with friends or relatives.**
- **International visitors were almost twice as likely as domestic visitors to stay in bed and breakfasts, rentals and hostels (20% vs 11%).**

Transportation Preference



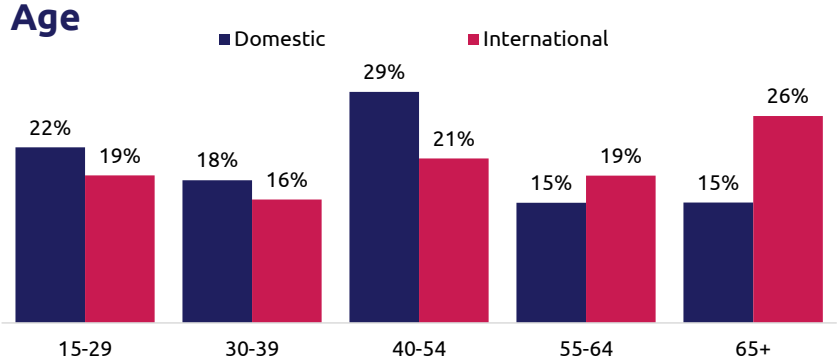
- **Air remains the main gateway, but self-drive plays a key role.** Over 6 in 10 domestic visitors and over half of international visitors travelled by air.
- **Domestic self-drive is largely driven by intra-Territory visitors.** Around 1 in 3 domestic visitors drove using a private or rental vehicle, with over half of this driven by intra-Territory visitors.

Travel Party



- **International visitors were most likely to travel alone (50%) or as a couple (27%).** Together, these accounted for over 3 in 4 international visitors, compared with over half of domestic visitors.
- **Over a quarter of domestic visitors travelled with friends and relatives or as a family group,** compared with around 1 in 5 international visitors.

Age



Source: International Visitor Survey and Domestic Tourism Statistics – Year Ending December 2025

- **Domestic and international visitors skew older,** with travellers aged 40 and over accounting for around 60% of domestic and two thirds of international visitors.
- **Domestic visitors had a slightly higher share of younger travellers,** with 2 in 5 aged 15 to 39, compared with over a third of international visitors.



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Activities

Dining	Sightseeing	Pubs, clubs, discos	Shopping	National/State Parks	Friends & Relatives*
62%	42%	32%	31%	25%	23%

** For domestic visitors only,*

Participation in Aboriginal Cultural Experiences

1 in 5 visitors participated in Aboriginal cultural experiences

Origin	Visitors ('000)	Visitor nights ('000)	Average length of stay	Participation rate	Visitor share of Top End
Domestic	111	448	4.0	14%	12%
International	64	1,149	17.9	44%	6.8%
Total	**175**	**1,597**	**9.1**	**19%**	**19%**

- **Almost 1 in 5 visitors to the Top End took part in an Aboriginal cultural experience,** totalling 175,000 visitors.
- **International visitors are far more likely to take part.** Around 44% of international visitors to the Top End took part in an Aboriginal cultural experience, compared with only 14% of domestic visitors. However, domestic visitors still made up most participants (63%).

Aboriginal cultural experiences include: experience Aboriginal art/craft and cultural displays, visit an Aboriginal site/community, attend an Aboriginal performance, go on a tour with an Aboriginal guide, participate in traditional activities, have an Aboriginal food experience and/or have a camping experience on Aboriginal land.

Self-Drive Market

1 in 3 visitors used self-drive as a mode of transport

Origin	Visitors ('000)	Visitor nights ('000)	Average length of stay	Participation rate	Visitor share of Top End
Domestic	259	786	3.0	33%	28%
International	42	1,208	28.8	29%	4.5%
Total	**300**	**1,993**	**6.6**	**32%**	**32%**

Source: International Visitor Survey and Domestic Tourism Statistics – Year Ending December 2025

- **Almost 1 in 3 visitors to the Top End were self-drive visitors**, totalling 300,000.
- **Domestic visitors dominated the self-drive market**, making up 86% of self-drive visitors, with intra-Territory visitors accounting for 7 in 10 domestic self-drive trips.
- **International self-drive visitors stayed much longer**, at an average of almost 29 nights compared with 3 nights for domestic visitors.

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Complementary Data Sources

Parks Visitation

Top End Region	2025 Visitors
Greater Darwin	2,103,500
Casuarina Coastal Reserve	1,422,200
Litchfield National Park	280,100
Berry Springs Nature Park	186,600
Howard Springs Nature Park	126,600
Fogg Dam Conservation Reserve	55,700
Mary River National Park – Shady Camp	32,300
Katherine	475,300
Nitmiluk National Park	251,200
Elsey National Park	146,800
Judbarra/Gregory National Park	43,900
Keep River National Park	13,400
Cutta Cutta Caves Nature Park	10,400
Limmen National Park	9,600
Kakadu	182,900
Kakadu National Park	182,900
Other Parks	546,600
George Brown Botanic Gardens	497,800
Territory Wildlife Park	48,800
Grand Total	**3,308,300**

Source: NT Parks and Wildlife; Parks Australia

Major and Cultural Event Attendances

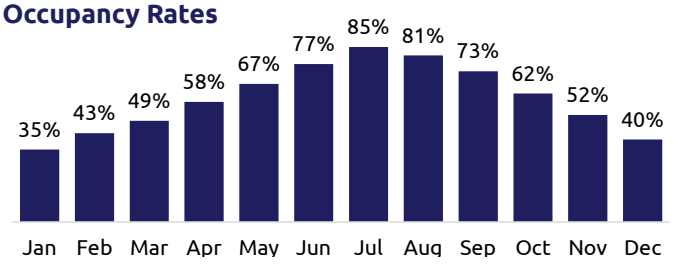
Events	2025 Attendances
NRL	9,459
BASSINTHEGRASS	11,025
AFL (2x Games)	22,130
Italian Festival	17,000
Barunga Festival	12,925
Supercars	36,889
Darwin Aboriginal Art Fair	15,538
International T20 Cricket	20,669
MXGP of Australia	36,444
Chariots of Thunder	10,371

Source: ier Events Research

Darwin Hotel Accommodation

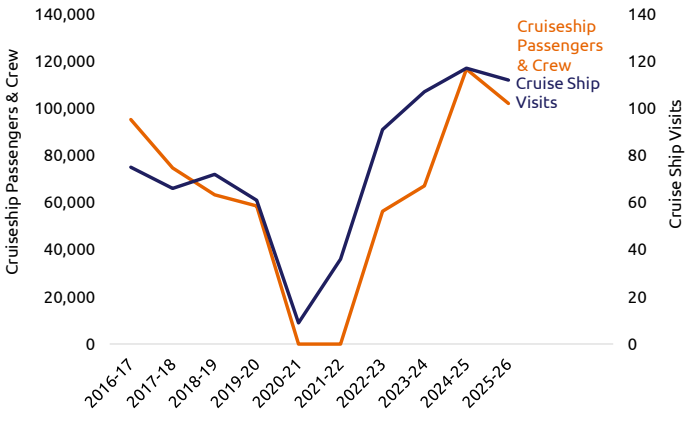
Rooms	Average occupancy	Average room rate	Revenue per available room
5,531	60%	$203	$122

Occupancy Rates



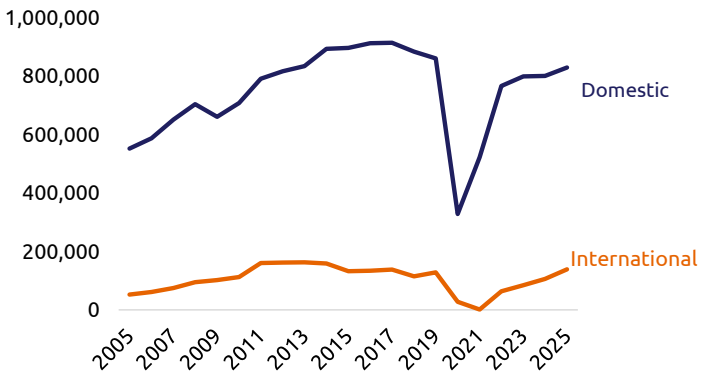
Source: STR - Year Ending December 2025

Cruise Ship Arrivals



Source: Darwin Port

Airport Traffic - Inbound Passengers



Source: Bureau of Infrastructure, Transport and Regional Economics