



East Arnhem Land Destination Management Plan 2021



Key Partners





Front cover:
Numuy (Turtle Beach) - Gove Peninsula
Image: Tourism NT/Mark Fitzpatrick

This page:
Gapuwiyak Culture and Arts - Gapuwiyak and surrounds
Image: DEAL



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Acronyms

AARWG	Arnhem Arterial Roads Working Group	ISACNT	Industry Skills Advisory Committee NT
ALC	Anindilyakwa Land Council	LGANT	Local Government Association of the Northern Territory
ARDS	Aboriginal Resource and Development Services Aboriginal Corporation	NCL	Nhulunbuy Corporation Limited
CDP	Community Development Program	NIAA	National Indigenous Australians Agency
DCDD	Department of Corporate and Digital Development	NLC	Northern Land Council
DCM&C	Department of the Chief Minister and Cabinet	NTATC	Northern Territory Aboriginal Tourism Committee
DEAL	Developing East Arnhem Limited	RRC	Regional Reconstruction Committee
DIDO	Drive-in drive-out	RTO	Registered Training Organisation
DIPL	Department of Infrastructure, Planning and Logistics	TA	Tourism Australia
DITT	Department of Industry, Tourism and Trade	TEA	Tourism East Arnhem
DMP	Destination Management Plan	TTE	Tourism Top End
ELA	Equatorial Launch Australia	TRA	Tourism Research Australia
FIFO	Fly-in fly-out	VIC	Visitor Information Centre
FTE	Full time equivalent	WDWG	Workforce Development Working Group
IPA	Indigenous Protected Area		

Glossary of Terms

Anindilyakwa

The Aboriginal people who inhabit Groote Eylandt and surrounding islands that make up the Groote Archipelago, which is situated to the west of mainland East Arnhem Land in the Gulf of Carpentaria.

Homeland (also known as outstation)

A small, traditional estate based on customary ownership. Homelands provide cultural, spiritual, health and economic benefits to residents. Homelands are the result of the homelands movement of the 1970s, which saw Aboriginal people relocate from missions to their ancestral lands to establish small communities.

Section 19

Section 19 of the *Aboriginal Land Rights (Northern Territory) Act 1976* allows for the development of most non-mining related activities on Aboriginal land. Businesses wanting to operate on Aboriginal Land must have a Section 19 agreement (for example, lease or licence) granted by the relevant land council.

Seasons

	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
Peak season												
Shoulder season												
Off season												

Legend ■ Wet Season ■ Dry Season

Yolŋu

The Aboriginal people who inhabit the mainland of the East Arnhem region of Northern Territory and associated island areas including the Crocodile Islands and Wessel Islands.

Note about data

Unless specifically referenced otherwise, figures quoted in the report pertaining to East Arnhem Land are a combination of the Australian Bureau of Statistics Statistical Area Level 2 areas of East Arnhem, Anindilyakwa and Nhulunbuy.

Note about references

References throughout the document can be found on page 83.

Impact of COVID-19

The East Arnhem Land region was declared a biosecurity zone from 26 March to 5 June 2020. All non-essential travel to and within the region was halted to ensure the risk of COVID-19 spreading to the region was minimised. During this period, anyone travelling to the region from outside the region was required to undergo 14 days of quarantine.

From June 2020, travel restrictions have progressively been lifted by relevant authorities to allow travel to, from and within the region.

All COVID-19-related access restrictions are unlikely to be lifted until the COVID-19 vaccine rollout is complete.

The tourism trends discussed in this document are based on information and data prior to the COVID-19 pandemic. Anecdotally, COVID-19 has had a limited impact on the tourism industry in East Arnhem Land when compared to other regions in Australia, owing to low numbers of leisure visitation prior to the pandemic and the vast majority of visitors being domestic.

With international borders to all countries except New Zealand expected to remain closed throughout most of 2021, domestic tourism is anticipated to increase. It is expected that the short to medium term trends in the Australian tourism industry will be impacted, creating disruption and changes in visitor demand and preferences. Accordingly, it will be critical to review shifting trends across the life of the DMP.

Note on tourism development

Unlike many other regions in Australia and across the world that already have established tourism industries, East Arnhem Land has an opportunity to design a visitor economy that enriches the lives of residents, promotes the health of the environment and provides transformational experiences for visitors.

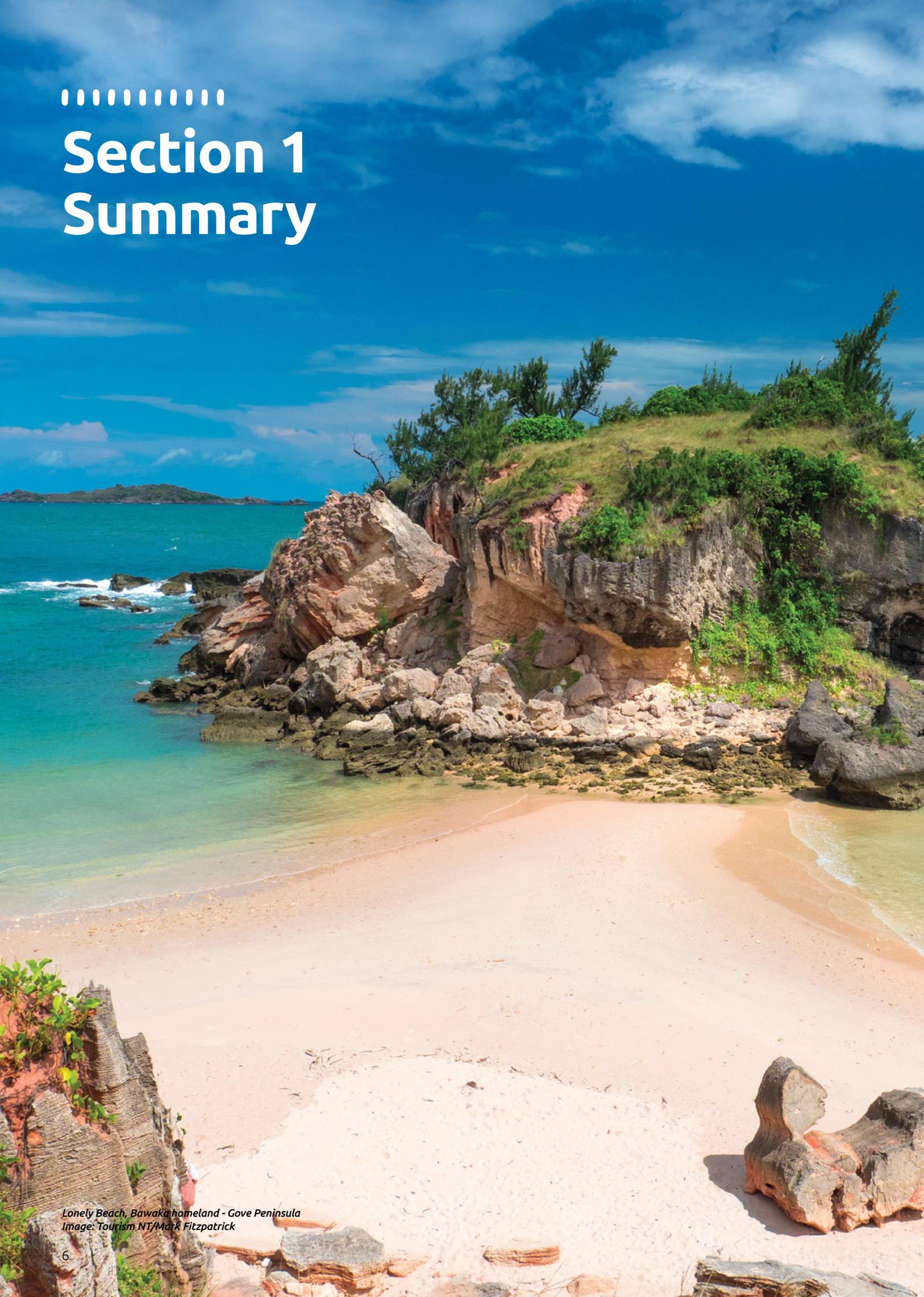
This DMP has been drafted to address the primary challenges that hinder tourism development and reduce barriers to entry for Yolŋu and Anindilyakwa interested in entering the tourism industry. Throughout the life of this plan, East Arnhem Land is expected to remain a niche tourism destination while these challenges are addressed.

This plan focuses on generating economic and societal outcomes for the region and its residents. The actions within seek to prevent leakage of tourism income to ensure a high proportion of revenue generated through tourism remains, where possible, within the region for future investment and projects that improves the livelihoods of residents. The success of the tourism industry in East Arnhem Land will reflect a holistic approach that embraces the above aims.





Section 1 Summary



*Lonely Beach, Bawaka homeland - Gove Peninsula
Image: Tourism NT/Mark Fitzpatrick*



Overview of East Arnhem Land Destination Management Plan

The Northern Territory Government's (NT Government) Department of Industry, Tourism and Trade (DITT) has invested in destination management planning as part of a suite of actions following the development and release of the *NT's Tourism Industry Strategy 2030*. Tourism NT commissioned independent, not for profit regional economic development company Developing East Arnhem Limited (DEAL) to develop a Destination Management Plan (DMP) for the East Arnhem Land region as part of a two-year funding agreement for a Tourism Development Officer based in the region. The DMP was developed in collaboration with East Arnhem Land tourism industry operators regional stakeholders and landowner representatives, with support and funding from Tourism NT.

Contributions from over 100 stakeholders, representing 65 organisations, were collected through a mix of regional workshops and individual consultations. Stakeholder feedback has informed the guiding principles to ensure the development of the region's tourism industry aligns with the priorities and realities of the region.

The key objectives of the East Arnhem Land DMP are to:

- assess the current state of tourism in East Arnhem Land
- capture the aspirations of Yolŋu and Anindilyakwa, tourism operators and key regional stakeholders
- review key strengths and assets of the region
- identify opportunities, gaps and potential investments for tourism development
- provide clear recommendations and actions for planning, development and marketing of the East Arnhem region as a tourism destination and identify the resources required.

The DMP provides a clear roadmap for developing sustainable growth across the region. The plan builds on previous consultancies completed in the region, including the *Gap Analysis and Action Plan for East Arnhem Land* and the *Central Arnhem Road Visitor Experience Review*. The content provided in the DMP aligns with the *NT's Tourism Industry Strategy 2030*, *Northern Territory Aboriginal Tourism Strategy 2020 – 2030*, and Tourism NT strategies developed to support drive and cruise tourism, with priorities reflected in the plan.

Tourism in East Arnhem Land

Tourism is a relatively small industry in East Arnhem Land, contributing

\$9.04 million¹

to the region's economy in 2019-2020 and generating employment for

1.8%
of the working
population²

Across 2017 - 2019, the East Arnhem region received an average of

51,000
visitors per year

who on average spent

6.5
nights in the region³

As at April 2021, there is a total of

53
tourism businesses

based in the region, of which

45%
are Aboriginal owned⁴



Buku-Larrngay Mulka Art Centre, Yirrkala - Gove Peninsula
Image: Tourism NT/Nicholas Goldhurst

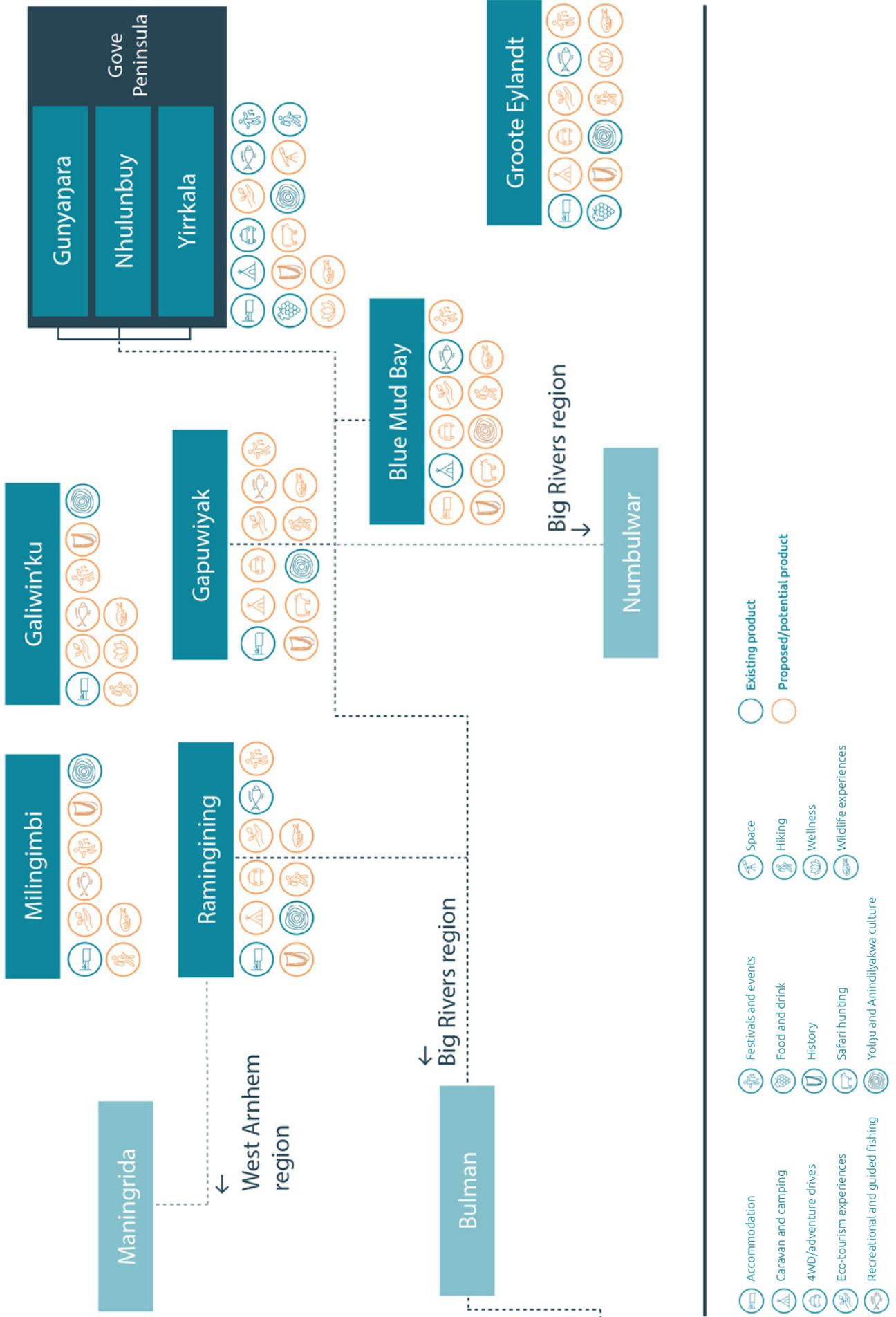


Figure 1 - East Arnhem Land region tourism experiences

Comparative advantages



Yolŋu and Anindilyakwa cultural immersion and learning experiences

East Arnhem Land is home to incredibly rich Yolŋu and Anindilyakwa culture, both of which are among the oldest living cultures on earth. The region offers a unique and unrivalled opportunity for cultural immersion, allowing visitors to learn from custodians of 65,000 years of culture.



Diverse history

East Arnhem Land has a diverse and multifaceted history that lives on through its residents.

Further information on comparative advantages on page 34.



Unique natural environment

The unique and unparalleled natural environment and breathtaking landscapes of East Arnhem Land make the region a pristine paradise.



Adventure drives

The Central Arnhem Road drive and tracks to access the more remote campgrounds in the region offer visitors the opportunity to journey through ancient landscapes, scenery and wildlife.



Destination development strategy

Given the emerging nature of the tourism industry in East Arnhem Land, this DMP has focused on a multifaceted destination development strategy that includes key development themes, each with an associated action plan, and a suite of product development opportunities.

- Destination vision – the vision for how East Arnhem Land is perceived by consumers
- Industry vision – the vision for how the tourism industry benefits the people of East Arnhem Land and contributes to the regional economy
- Key development themes – focus areas of development to grow the tourism industry in East Arnhem Land
- Product development opportunities – opportunities for new product development based on cultural, environmental and geographical features of East Arnhem Land and regional tourism trends
- Sub-regional development projects – infrastructure and tourism development projects in each sub-region of East Arnhem Land as identified through stakeholder engagement.

The full destination development strategy is found on page 32 onwards and a summary is outlined in this section.

Destination vision

By 2031, East Arnhem Land will be a high-quality, year-round bucket list destination, which is internationally recognised for its cultural significance and natural beauty and is affordable to access by land, air and sea.

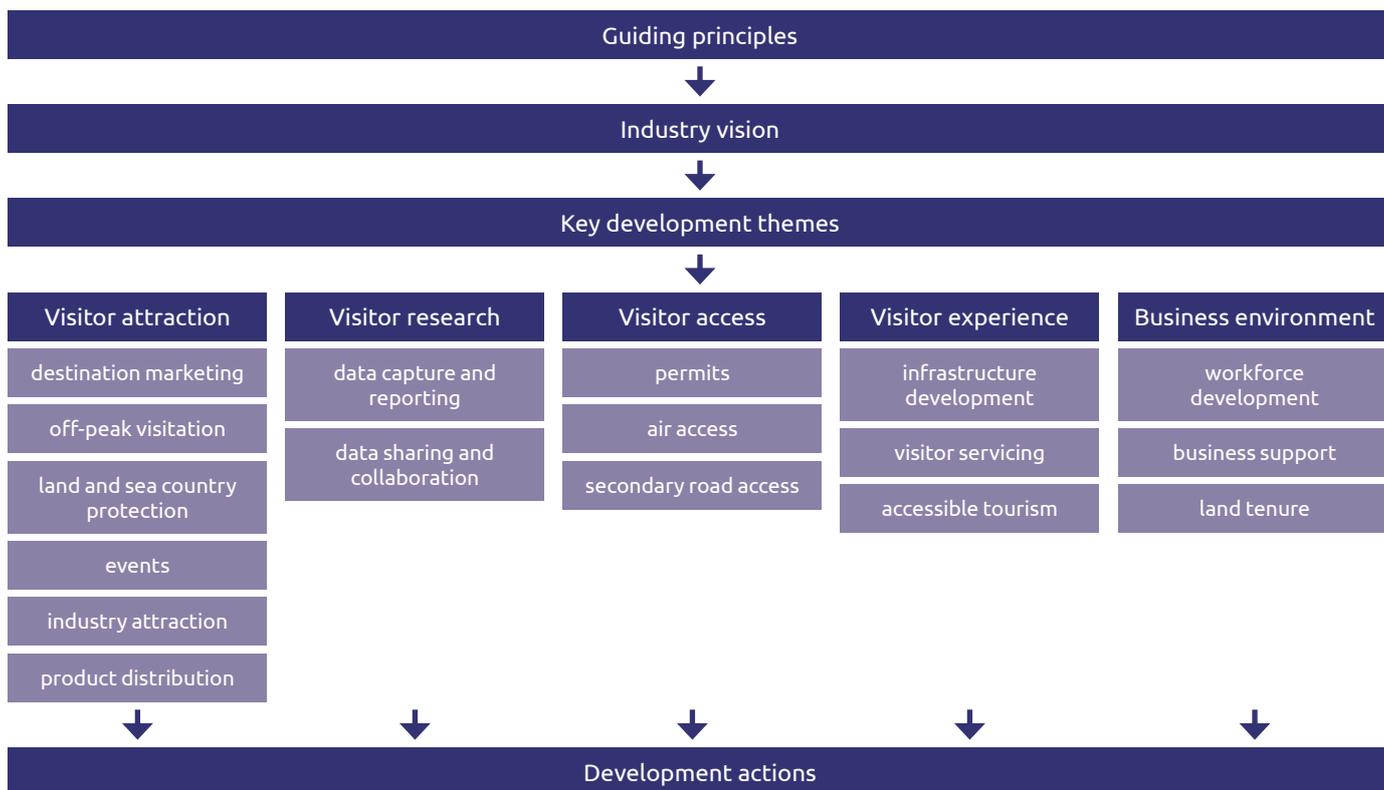
Industry vision

By 2031, the East Arnhem Land visitor economy will be a key driver of regional economic growth, while remaining culturally, environmentally and economically sustainable. Led by Traditional Owners and supported by public and private investment, tourism development will be strategically and collaboratively coordinated to ensure it contributes to the empowerment of Yolŋu and Anindilyakwa peoples through skills development, employment and increased intercultural understanding.

Key development themes

Five broad development themes separated into 17 focus areas have been identified, each with associated actions to address the challenges.

These development themes and associated actions are key enablers that will support the range of product development opportunities outlined in the following section.



Further detail on the key development themes can be found from page 35.

Product development opportunities

Based on the region's comparative advantages and regional tourism trends, 15 product development opportunities have been identified.

The following product categories have been identified as growth opportunities for the region to progress:



Yolngu and Anindilyakwa culture



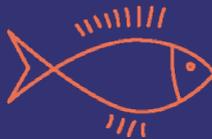
Accommodation



Caravan and camping



4WD/adventure drives



Recreational and guided fishing



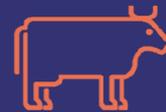
Festivals and events



Food and drink



History



Safari hunting



Eco-tourism experiences



Space



Transport options



Hiking



Wellness



Wildlife experiences

Further detail on product development opportunities and locations can be found from page 50.

Sub-regional development opportunities

Consultations with stakeholders identified a strong interest to develop tourism product across all sub-regions of East Arnhem Land.

This part of the strategy outlines each sub-region, their current accommodation and camping capacity and attractions, as well as tourism-related projects identified by stakeholders, noting the identified projects lists are not exhaustive.

Projects are listed based on their location within the sub-region, the product development category they fall under and their current status.

Details on these opportunities can be found from page 60.



Central Arnhem Road
Image: Tourism NT/Aaron Avila



Destination Management Plan development

Destination management planning

Destination management planning is a comprehensive approach to regional tourism development, accounting for social, economic and ecological factors in the destination. It considers the interrelatedness of these factors and their relationship to tourism outcomes.

Destination management is an ongoing process that allows private industry, government and communities to work together to define a unified vision for a destination, plan to achieve the industry's desired future, and manage the desired outcomes for a destination.



Guiding principles

The DMP is underpinned by the key principle that East Arnhem Land is Aboriginal land, and the development of the tourism industry must be led by and for the benefit of Yolŋu and Anindilyakwa peoples across the region. Yolŋu and Anindilyakwa culture is the core of East Arnhem Land's identity and remains one of the destination's top comparative advantages when compared to similar regions.



Promoting cultural heritage and walking in both worlds learning

East Arnhem Land remains a stronghold for Aboriginal culture. Tourism is an opportunity for Yolŋu and Anindilyakwa peoples to share their culture with visitors from other backgrounds. It also supports cultural heritage to remain strong by assisting with the flow of knowledge being passed down to future generations.

Yolŋu and Anindilyakwa consulted as part of the DMP, identified tourism as an opportunity to keep culture alive and strong by sharing culture within their community and with visitors. They also identified an opportunity for Aboriginal and non-Aboriginal people to 'walk in both worlds' by connecting, engaging and learning from each other. Yolŋu and Anindilyakwa culture is not for sale and there is little interest to commercialise it, rather, it is an opportunity for immersive, experiential learning.



Advancing economic outcomes

The tourism industry is well positioned to contribute to the pursuit of Yolŋu and Anindilyakwa economic independence whether through employment, leasing land, creating cultural tourism experiences, or offering ancillary product and services that feed into the visitor economy. It is important to note that environmental and societal impacts need to be considered when identifying economic opportunities.



Recognising and respecting cultural knowledge and practices

There is a strong desire for the region to attract visitors and businesses that are interested in engaging and learning from Yolŋu and Anindilyakwa. Visitors and tourism operators must have respect for law, governance, protocols, customs and culture of Yolŋu and Anindilyakwa peoples and acknowledge that at times creative solutions will be required to satisfy the priorities of both communities and visitors.



Ensuring environmental sustainability

The tourism industry must remain committed to protecting and enriching the natural environment. Yolŋu and Anindilyakwa have been caring for and nurturing their lands and seas for over 65,000 years. The development of the industry must acknowledge the challenges associated with climate change, marine debris and conservation to ensure the tourism industry participates in addressing these issues.

Consultation process

This DMP was developed by DEAL with input from and in consultation with representatives of the following organisations. Their time and contributions to the plan are much appreciated.

- Airport Development Group
- Anindilyakwa Land & Sea Rangers
- Anindilyakwa Land Council
- Arafura Swamp Rangers
- Arirrkı Aboriginal Corporation
- Arnhem Land Progress Aboriginal Corporation
- Bäniyala Garrangali Aboriginal Corporation
- Banubanu Beach Retreat
- Bawaka Aboriginal Corporation
- Broome, Kimberley & Beyond
- Buku-Larrngay Mulka Centre
- Bula' Bula Arts
- Bulungkunum Corporation Limited
- Bush Medijina
- Cooee Traveller
- Crooked Compass
- Culture College Arnhem Land Aboriginal Corporation
- Department of the Chief Minister and Cabinet
- Department of Industry, Tourism and Trade
- Department of Territory Families, Housing and Communities
- Dhimurru Aboriginal Corporation
- Dhipirri Barra & Sportfishing Lodge
- Djalkiripuyngu Aboriginal Corporation
- Djilpin Arts
- East Arnhem Real Estate
- Enterprise Learning Projects
- Gapuwiyak Culture and Arts
- Goṅdäl Aboriginal Corporation
- Gove Boat Club
- Gove Boat Hire
- Gove Tackle & Outdoors
- Great Divide Tours
- Groote Eylandt and Bickerton Island Enterprises
- Groote Eylandt Lodge
- Gumatj Corporation
- Helloworld Travel Limited
- Holidays of Australia
- Kakadu Tourism
- Katherine Visitor Information Centre
- Keep Top End Coasts Healthy
- Laynhapuy Homelands Aboriginal Corporation
- Lirrwi Yolṅu Tourism Aboriginal Corporation
- Mainoru Outstation Store
- Manapan Furniture
- Many Rivers Microfinance Limited
- Marthakal Homelands Aboriginal Corporation
- Milingimbi Art and Culture Centre
- Milingimbi Gattjirrk Cultural Festival
- Milintji Development Pty Ltd
- Mimal Rangers
- National Indigenous Australians Agency
- Njarrariyal Aboriginal Corporation
- Nhulunbuy Corporation Limited
- Northern Land Council
- Nyinyikay Dha Wuba Aboriginal Corporation
- Parks Australia
- Regional Development Australia
- Rirratjingu Aboriginal Corporation
- Sealink NT
- Tourism East Arnhem
- Tourism NT
- Tourism Top End
- Venture North Safaris
- Walkabout Lodge
- Yirralka Rangers
- Yothu Yindi Foundation.

The consultation process was developed to ensure high stakeholder engagement and input into the plan. A mix of regional workshops and individual consultations were held to ensure stakeholders were able to work collaboratively in recognising regional priorities while also allowing individual priorities to be identified.

Consultations

- Gapuwiyak (29 – 30 September 2020)
- Ramingining and Wulkabimirri and Ngangalala homelands (5 – 6 October 2020)
- Milingimbi (6 – 7 October 2020)
- Darwin (8 – 9 October 2020)
- Groote Eylandt including Alyangula, Angurugu and Umbakumba (13 – 16 October 2020)
- Galiwin'ku and Galawarra, Gunpura and Banthula homelands (19 – 20 October 2020)
- Baniyala, including representatives from Nyinykay, Gan Gan and Wandawuy (22 – 23 October 2020).

Regional consultations involved meeting with board members, directors and staff of businesses that incorporate tourism into their operations or aspire to do so in the future. The consultations were also an opportunity to meet with existing and aspiring Yolṅu and Anindilyakwa entrepreneurs to understand more about their tourism projects.

Workshops

- Nhulunbuy (17 August 2020)
- Darwin (27 August 2020)
- Online (2 September 2020)
- Alyangula (15 October 2020).

Regional workshops were an opportunity for stakeholders to come together as a group to brainstorm challenges facing tourism development in the region, along with opportunities and focus areas for the DMP to advance.

Feedback

A draft DMP was circulated to industry and regional stakeholders in January 2021 for review. Feedback received during this period has been incorporated into this document. It is intended that the DMP will be continually updated as new information and developments come to light. Feedback on the DMP is welcomed at any stage for incorporation into future versions of the document.

Implementation, monitoring and evaluation

Tourism NT, with on ground support from the Tourism Development Officer (DEAL), will lead the Project Implementation Team (PIT), which will ensure stakeholders remain accountable for implementing actions they have been assigned within the DMP. The PIT will meet a minimum of twice a year, to discuss progress of assigned actions and opportunities for collaboration.

Initial PIT membership is comprised of those organisations with actions arising from the DMP:

- Tourism NT
- Developing East Arnhem Limited
- Tourism Top End
- Tourism East Arnhem
- Northern Land Council
- Anindilyakwa Land Council
- Department of the Chief Minister and Cabinet
- Department of Infrastructure, Planning and Logistics
- Department of Industry, Tourism and Trade
- Department of Territory Families, Housing and Communities - Arts and Culture
- National Indigenous Australians Agency
- Nhulunbuy Corporation Limited.

The composition of the PIT will be flexible to bring in others who may be relevant to certain actions or have an interest in overseeing the implementation of this plan

The ten-year timeframe for the DMP establishes a need for regular monitoring and evaluation of the effectiveness of the plan in supporting industry growth. The PIT will report annually on the progress made against the actions identified in the DMP through annual progress reports and an annual review score card. The implementation of the surveys at key visitor touch points (action 20, page 40) and the formation of the Regional Data Working Group (action 24, page 40) will ensure visitation trends are captured in the absence of statistically reliable visitation data.

Enhanced tourism outcomes will require alignment and collaboration across the public, private and community sectors. Reviews of the DMP will occur every two years to ensure the DMP remains relevant and continues to evolve as the industry evolves. This process will ensure stakeholders from all sectors remain involved in providing feedback and contribute to a sustainable tourism sector on a regular basis.



*Dhipirri Barra & Sportfishing Lodge - Milingimbi and Crocodile Islands
Image: Tourism NT/Shana McNaught*



Section 2 Situation Analysis



*Dhamiljinya (East Woody Island) - Gove Peninsula
Image: Tourism NT/Mark Fitzpatrick*

The East Arnhem region overview

The East Arnhem region is home to the Yolŋu people whose land encompasses the entirety of the mainland and northern islands of East Arnhem Land and the Anindilyakwa people whose land encompasses the entirety of the Groote Archipelago. Aboriginal and Torres Strait Islander people make up 68.1% of the region's population.⁵ This increases to 93.5% when excluding the mining towns of Nhulunbuy and Alyangula.⁶

The regional centre of Nhulunbuy operates as a service and business hub for East Arnhem Land and is a vibrant community with high standards of education, health, social, sporting, cultural and shopping facilities. The sub-regional hub of Alyangula on Groote Eylandt supports the archipelago and the island's manganese mine with a high level of services.

Outside of Nhulunbuy and Alyangula, East Arnhem Land is made up of over 100 communities and homelands:

- Yirrkala
- Gulyanara
- Milingimbi
- Ramingining
- Gapuwiyak (Lake Evella)
- Angurugu
- Galiwin'ku
- Milyakburra
- Umbukumba
- Over 96 homelands.⁷

Regional overview

The East Arnhem region is made up of the East Arnhem Local Government Area and the unincorporated towns of Nhulunbuy and Alyangula.

The regional economy is heavily weighted toward mining, which generates 45.8% of output and 18.1% of local employment.⁸

Further socio-economic information is available in Appendix – Social-economic profile.

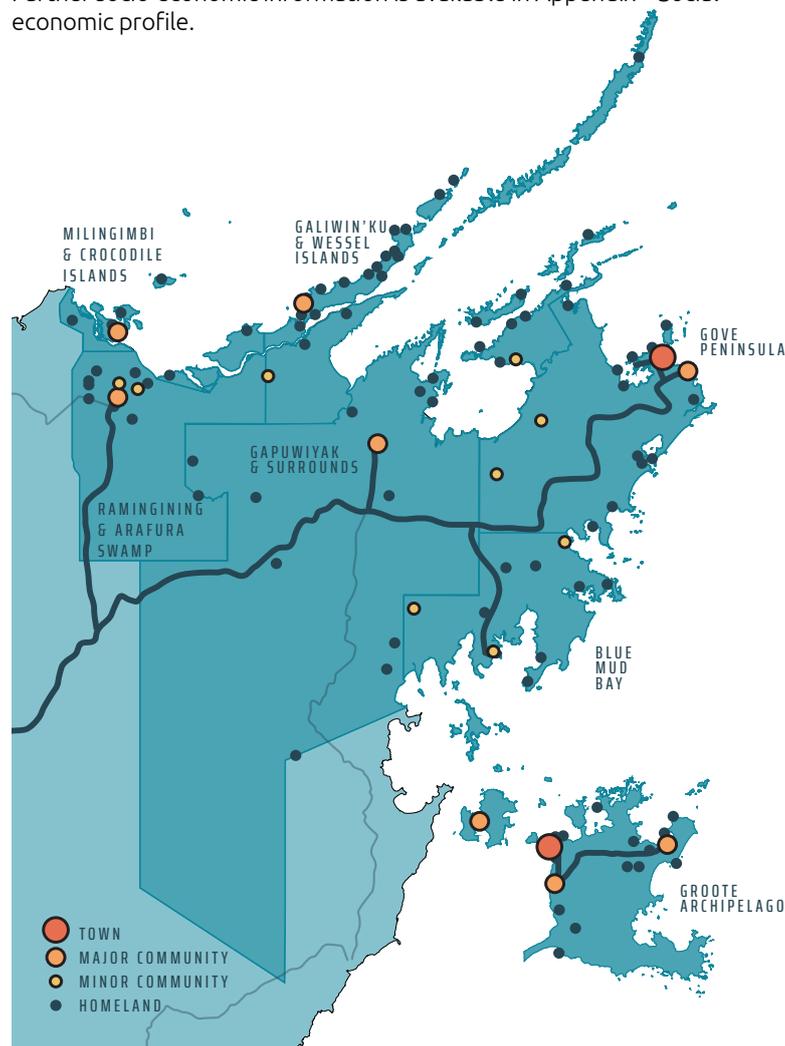


Figure 2 - Distribution of towns, communities, and homelands across sub-regions of East Arnhem Land

Population⁹

14,565

Total area¹⁰

33,457km²

Number of businesses¹¹

229

Local employment¹²

5,734

Gross regional product¹³

\$968 million

Major industry sectors by value add to the economy¹⁴

- Mining (\$466.0m)
- Health care and social assistance (\$95.7m)
- Education and training (\$70.7m)
- Public administration and safety (\$65.7m)
- Construction (\$29.7m).

Regional access

Air connectivity

Gove Airport

Gove Airport, which services Nhulunbuy and the surrounding communities of Yirrkala and Gunyaṅara, is the largest airport in the region, serving over 58,000 passengers in 2019.¹⁵

Airnorth operates regular scheduled jet services from Darwin International Airport and Cairns Airport. The jet services are codeshared with Qantas allowing for seamless transfers to Gove Airport from most major Australian capital cities and some international destinations.

Since December 2020, changes to the Aviation Security Transport Regulations no longer require Gove Airport to provide screening services. Passengers and baggage are no longer screened before departure, thus passengers travelling from Gove Airport and transiting through Darwin International Airport or Cairns Airport must go through security and may have to recheck their baggage upon arrival at either airport.

Gove Airport is also a regional hub for regular passenger transport services and charter operations that provides intra-regional connectivity between communities throughout the region.

Groote Eylandt Airport

Groote Eylandt Airport, the region's second largest airport, served 26,460 passengers in 2019.¹⁶ The airport receives regular Airnorth services from Darwin and has a strong regional charter presence. The airport receives frequent mining-related chartered jet services from Darwin, Cairns and Brisbane.

Communities and homelands

Elcho Island, Gapuwiyak, Ramingining and Milingimbi have sealed runways and receive passenger services from Darwin and Gove multiple times per week.

Most homelands have unsealed airstrips capable of landing twin engine aircraft and are serviced via charter flight.

Refer to Appendix – Passenger movements for a breakdown on passenger movements by airport and Appendix – Regional air routes for a breakdown on regional air services.



Figure 3 – Scheduled air connections to and within East Arnhem Land

Road access

Central Arnhem Road

Road access to the region is primarily via the Central Arnhem Road which runs 672 kilometres from the Stuart Highway to Nhulunbuy. Most of the road is unsealed and conditions frequently change depending on road traffic and weather conditions.

Drive times usually range between 8 and 10 hours (dependent on conditions) between Nhulunbuy and Katherine. A high clearance vehicle with appropriate off-road accessories is required to safely travel the road.

A Northern Land Council (NLC) Transit Permit is required to drive the Central Arnhem Road. These permits can be applied for online and must be carried while transiting the road. While caravans are able to be towed on the road, the NLC will only issue permits for the towing vehicle, which may have implications for insurance purposes.

Refer to Appendix – Traffic monitoring for information on road traffic.

Arterial access roads

The communities of Gapuwiyak and Ramingining are both accessible by arterial roads that connect to the Central Arnhem Road.

The Central Arnhem Road also connects to other arterial roads that service over 50 homelands in the region. The condition of these arterial roads vary but generally they are in poorer condition than the Central Arnhem Road and the Gapuwiyak and Ramingining access roads. Access to homelands can be very difficult during the wet season, with many roads becoming impassable due to impacts of heavy rainfall.

In addition to the Transit Permit required for travel on the Central Arnhem Road, an additional permit related to the purpose of travel is required from the NLC to travel to communities and homelands.

Road maintenance responsibilities vary depending on the road.

Table 1 - Entities responsible for road maintenance

Road	Entity responsible for maintenance
Central Arnhem Road	Northern Territory Government through DIPL
Gapuwiyak Access Road	Local Government - East Arnhem Regional Council
Ramingining Access Road	Local Government - East Arnhem Regional Council
Homelands access roads	Homelands service providers through LGANT funding

South East Arnhem Land Track

The South East Arnhem Land (SEAL) Track connects Numbulwar to the Central Arnhem Road. This road is not maintained, and permits are currently not issued for recreational purposes.

Top Track

The Top Track refers to the road linking Jabiru and Gunbalanya to Maningrida and Ramingining. Permits are not issued to travel the road for recreational purposes.

Public transport

A biweekly bus service operates from Nhulunbuy to Gapuwiyak. This service connects to a separate service that continues from Gapuwiyak to Katherine, and onwards to Darwin. This service is predominately utilised by residents of regional communities.



Figure 4 - Road connections to East Arnhem Land

Sea access

Cruise ships

The Gove Peninsula and Elcho Island are visited by a small number of expedition cruise ships each year.

On the Gove Peninsula, cruise ships usually anchor off the coast of Yirrkala to visit the Buku-Larrngay Mulka Centre. Depending on sea conditions, ships may also anchor off Melville Bay, where passengers can be transferred by bus to Yirrkala.

The construction of the Gunyanara (Gove Port) Tourism Precinct, scheduled for completion in 2022, will see new marine and land infrastructure developed adjacent to the Gove Boat Club on Melville Bay, to support existing tourism operators. The facility will likely increase the number of yachts anchoring in Melville Bay, increasing the contribution to the local economy. The port will also attract expedition cruise ships to the region and provide safer and more professional mooring for existing and new marine based tourism operators in the region.

Tidal conditions often dictate anchoring points off Elcho Island. Cruise ships have been known to visit the homelands of Gawa, Banthula and Galiwin'ku/Galawarra depending on the time of year and onshore experiences available.

Cruise ships have not visited Groote Eylandt for over ten years, though there is growing interest from the local community and cruise operators to include Groote Eylandt on future cruise itineraries.

Cruise companies have indicated they would be interested in visiting Blue Mud Bay, Milingimbi and Raymangirr (to the north of Gapuwiyak) in the future, if tidal conditions permitted and appropriate onshore experiences were available.

Refer to Appendix – Cruise arrivals for information about the number of cruise passengers visiting the region.

Yachts

Melville Bay is well known in the yachting community as a preferred stopover location for resupplying vessels travelling between Cairns and Darwin.

Based on figures from the Gove Boat Club, 251 yachts are confirmed to have visited Melville Bay in 2020.¹⁷

First point of entry

Up until June 2019, the Port of Melville Bay (Gove Peninsula)¹⁸ and the Port of Milner Bay (Groote Eylandt)¹⁹ were both designated ports of first point of entry for all vessels, allowing yachts (non-commercial vessels) and cruise ships (passenger vessels) to formally enter Australia from abroad. Due to regulatory changes in June 2019 both Melville Bay²⁰ and Milner Bay²¹ lost first point of entry status. The closest first point of entry to East Arnhem Land is now the Port of Darwin²² or Port of Port Kennedy (Thursday Island).²³

Ferry services

Sealink NT provides a weekday passenger-only ferry service connecting Groote Eylandt to Numbulwar via Bickerton Island.

As of 1 July 2020, the ferry runs to the following schedule:²⁴

- Groote Eylandt – Bickerton Island – Numbulwar– Groote Eylandt (twice weekly)
- Groote Eylandt – Bickerton Island – Groote Eylandt (eight times weekly).

A connecting bus service connects the communities of Umbukumba and Angurugu to Alyangula where the ferry service departs.

These ferry services are predominately utilised by residents of regional communities.



Trends in the East Arnhem Land visitor economy

The East Arnhem Land visitor economy is currently a small contributor to the region’s economy. The value of tourism and associated employment has decreased substantially over the past decade. This is likely attributed to reduced numbers of fly-in fly-out (FIFO) workers for mining operations on the Gove Peninsula due to the curtailment of the aluminium refinery on the Gove Peninsula and a subsequent change in policy by Rio Tinto Gove Operations to preference a residential workforce. The closure of the refinery also saw Qantas no longer operate flights to the region, reducing the number of seats available to Gove Airport. Passenger numbers to Gove Airport in 2019 compared to 2013, the year before the closure, indicate a 46.5% reduction in passenger movements through the airport.²⁵

Economic impact

The tourism and hospitality industry contributed \$9.04 million to the East Arnhem regional economy in 2019/20²⁶, down from \$15.39 million in 2014/15.²⁷

Current economic activity attributed to tourism represents 0.6% of economic output for the East Arnhem region.²⁸ In comparison, the tourism and hospitality sector contributes 5.0% to the Northern Territory economy.²⁹

The East Arnhem Land tourism and hospitality industry represents 0.4% of total Northern Territory tourism and hospitality economic output.³⁰

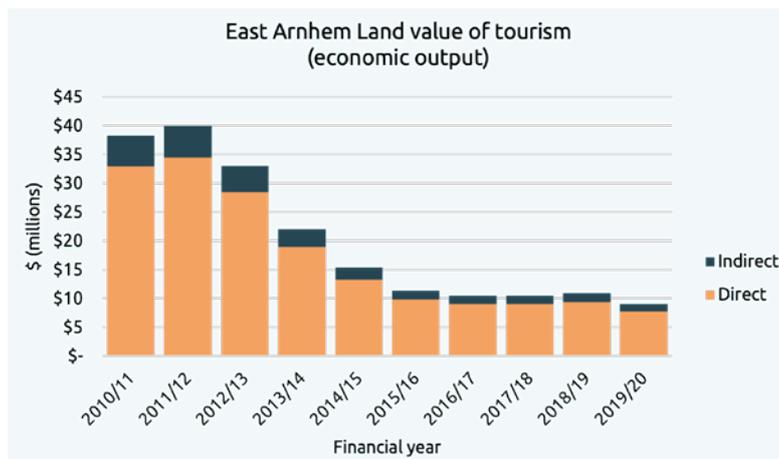


Figure 5 - Value of the East Arnhem Land tourism and hospitality sector by economic output from 2010/11 – 2019/20³⁵

Employment

Tourism in the East Arnhem region generated 101 jobs (61 FTE) in 2019/20³¹ down from 122 jobs in 2014/15.³² Current employment from tourism represents 1.8% of all employment in the region. In comparison, tourism generates 9,237 jobs in the Northern Territory, representing 6.9% of all Northern Territory employment.³³

Tourism to the East Arnhem region represents 1.8% of total employment generated by the Northern Territory tourism industry.³⁴

These figures do not capture the employment generated by homelands tourism. Employment generated through cultural tourism activities is often casual due to the infrequency of tours. Tourism activities can employ over 100 Yolŋu residents in a given year, often on a one-time or casual basis, depending on demand.

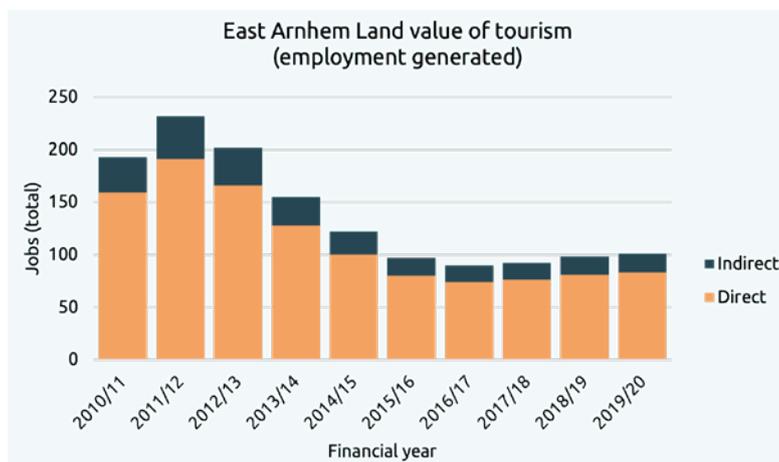


Figure 6 - Employment generated by visitation to East Arnhem Land from 2004/05 – 2019/20³⁶

Tourism businesses

There is a total of 53 tourism businesses operating in the region.³⁷ Of these businesses, 24 (45%) are Aboriginal owned (defined as at least 50% Aboriginal ownership). The majority (60%) of these businesses operate from the Gove Peninsula. To be included, the business must fit into one or more of the primary business type listed in Table 2.

It is worth noting that while many of these businesses cater to visitors, for many, such as the restaurants, air charters and art centres, tourism is complementary to their core business.

Table 2 – Tourism businesses operating in East Arnhem Land

Primary business type	Number of businesses operating	Number of Aboriginal owned/operated businesses
Accommodation	11	6 (55%)
Camping	4	3 (75%)
Restaurants and cafes	9	0 (0%)
Tour operators	4	2 (50%)
Fishing charters	5	0 (0%)
Air charters	5	1 (20%)
Hire cars	4	1 (25%)
Art centres	6	6 (100%)
Cultural tourism businesses	5	5 (100%)
Total	53	24 (45%)

Visitation

An average of 51,000 people visited the East Arnhem Land region each year across 2017-2019.³⁸ The average length of stay (ALOS) in the region over the same period was 6.5 nights, resulting in a total of 330,000 visitor nights spent in the region.

Based on the current visitor markets, it is surmised the vast majority of visitors are domestic.

Visitation by purpose of visit and visitor expenditure is unable to be modelled for the region due to low visitor numbers.

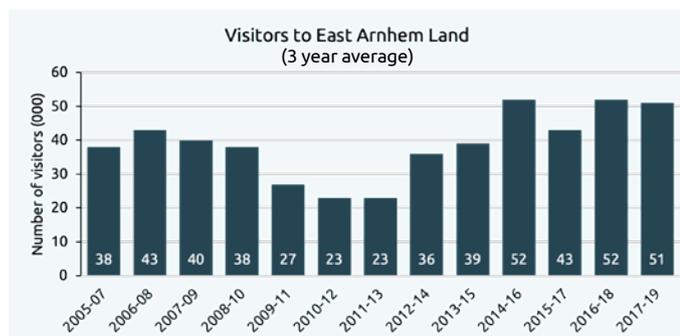


Figure 7 - Average annual visitors to East Arnhem Land³⁹



Figure 8 - Annual visitor nights spent in East Arnhem Land⁴⁰

Visitor economy growth potential

Employment generated from tourism is significantly lower in East Arnhem Land compared to the Northern Territory as a whole. This is due to the significantly lower numbers of visitors to the region compared to most other regions of the Northern Territory.

It is estimated an additional 252 jobs would be created in the region if the tourism industry expanded to represent the same number of jobs as a proportion of the economy as the Northern Territory as a whole.⁴¹

Similarly, it is estimated that tourism would contribute \$61.09 million (up from \$9.04 million) to the East Arnhem Land economy if the region's tourism sector was proportionate to the Northern Territory as a whole.⁴²

These figures do not attempt to forecast future growth of the industry, but rather seek to represent what the tourism economy of East Arnhem Land would look like if the region's economy reflected that of the wider Northern Territory.

Visitor markets analysis

Existing core markets

The current visitors to the region consist of the following markets:

Self-drive market

Based on the current spread of tourism activities and accommodation, it is assumed the self-drive market is the core visitor market to the Gove Peninsula and are estimated to represent most recreational visitors to the region. These visitors are equipped for the journey with the necessary vehicle and equipment and are self-sufficient, usually carrying camping equipment or a caravan/camper trailer.

This market is strategic to the region, as there is more camping capacity in the region compared to standard accommodation, allowing for more visitors at one time. They are also not reliant on hire cars or commercial tours to visit the region's recreational areas.

As there is a number of recreational areas with diverse features and camping infrastructure, the length of stay in the region is presumed to be longer than those staying in hotel accommodation. Despite longer stays, in-region spend is expected to be lower due to the self-sufficiency of the market and the limited number of bookable experiences available that appeal to the self-drive market.

The self-drive market is dependent on road access, limiting this market to the dry season.

Organised tours

The region's remoteness and access requirements means travelling as part of an organised tour can often be a convenient and safe way to visit East Arnhem Land. Tour operators often have strong relationships with Traditional Owners, allowing visitors exclusive access to areas which are not available to independent travellers.

Organised tours offered by Outback Spirit, Lirrwi Tourism and Wildcard Luxury Cruises are fully catered. Companies such as Great Divide Tours operate tag-along tours, allowing visitors to travel with their own vehicle in the safety of a convoy and with the convenience of having permits and campsites organised on the travellers' behalf.

Apart from tag-along tours, organised tours almost exclusively rely on their passengers arriving by air.

Fishing enthusiasts

The region's estuaries and blue waters are attractive to fishers due to the abundance of fish and the diversity of species available. The Arnhem Land coast attracts visitors chasing a one metre barramundi.

Fishing enthusiasts are high-yield, interstate visitors who dedicate their time in the region to fishing. These visitors stay at fishing lodges or aboard dedicated motherships, which include accommodation, meals, tackle, permits and transfers. Most fishing enthusiasts visit over the wet season, which offers the best chance of catching a prized barramundi.

Visiting friends and relatives (VFR)

The VFR market is a consistent source of visitation to the East Arnhem region. Many non-Aboriginal residents of East Arnhem Land originate from outside the region and the Northern Territory, creating opportunities for interstate VFR visitation.

Given the region's remoteness and permit requirements, visitors may feel more comfortable visiting the region when they know someone residing in the region.

Regional sporting events such as the Nhulunbuy Rotary Club's Beach Volleyball Tournament and the various fishing competitions run throughout the year are known to attract the VFR market. The VFR market also spurs local spend on tourism-related product and services as hosts will likely participate in the same activities as their guests.

Considering hosts play an influential role in planning the trip of their guests, it is important locals remain aware of the latest tourism developments across the region.

There is an opportunity to fully leverage the VFR market by marketing existing events and creating new events that cater directly to this market.

There is also a high degree of intra-regional mobility among regional community members for the purpose of ceremony and visiting family. Enhancing regional mobility through investment in road and sea infrastructure along with convenient transport options would likely see greater economic and societal benefits through increased intra-regional visitation due to cost reductions.

Education

A range of schools in Victoria and New South Wales currently offer their students the opportunity to visit the Gove Peninsula and surrounding homelands to participate in cultural immersion programs. These tours are typically seven to ten days long.

These programs are highly integrated into the regional economy with over 98% of program expenditure (excluding airfares) based in region, generating income for over 12 locally owned businesses.⁴³ The programs also generate temporary employment for over 100 Yolŋu cultural facilitators and help develop skills that are transferable across multiple industries.

There is growing awareness of the importance of incorporating genuine learning outcomes relating to Indigenous peoples into the national curriculum.⁴⁴ There are also opportunities to grow these programs to include more schools around Australia and expand the footprint of the programs to include other sub-regions such as Groote Eylandt.

Equatorial Launch Australia (ELA) is currently establishing the Arnhem Space Centre, the first equatorial launch facility in the southern hemisphere, on the Gove Peninsula. Once this site is operational, likely in 2021-22, there will be opportunities to expand these programs to create tailored educational programs which combine traditional knowledge of the night sky with space-related science, technology, engineering and mathematics (STEM) learning.

East Arnhem Land has strong potential to grow its educational tourism market by leveraging the Arnhem Space Centre as an alternative to international space programs.



Garanhan (Macassan Beach) - Gove Peninsula
Image: Tourism NT/Hayley Anderson

Fly-in Fly-Out/Drive-in Drive-Out (FIFO/DIDO)

The FIFO workforce represents approximately 21% of all employment in the region.⁴⁵ This mostly consists of mining workers but also includes public servants and service providers operating out of Darwin. The FIFO workforce offers benefits to the local tourism industry by increasing the number of air services. This improves regional connectivity and offers more flexible air transport options for tourists and locals alike.⁴⁶

Mining is set to cease on the Gove Peninsula around 2030. There will be a significant increase in FIFO workers visiting the region to support closure efforts over this time. This represents an opportunity for the local tourism industry to provide leisure services to these workers while they are based in the region.

Art centres report that they receive frequent visits by FIFO and DIDO personnel who visit the centres while in community for work purposes. By developing bespoke experiences, targeted at these travellers, there is an opportunity to extend length of stay in these communities by mixing work with recreational activities.

Future markets

Given there is significant growth potential and opportunity for expansion within the existing core markets through product development and better servicing, this DMP is primarily focused on how to achieve this growth. If growth potential is achieved across these markets, future efforts will look to focus on other growth markets, such as international travellers and business events.

Purpose of visit

Current visitation to the East Arnhem Land region is primarily work related. This relates to the large FIFO workforce presence across the mining towns of Nhulunbuy and Alyangula, and the delivery of various government services and other services provided by organisations based outside the region.

The vast majority of leisure visitation is centred on the Gove Peninsula where accommodation, camping facilities, restaurants and attractions catering to leisure tourists are located.

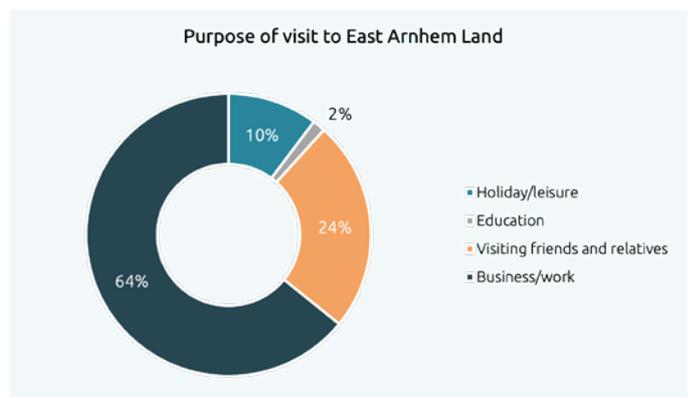


Figure 9 - Breakdown by purpose of visit in 2019 (estimated)⁴⁷

Visitor perceptions

ReviewPro

ReviewPro is a software platform for the tourism and hospitality industry to understand and improve visitor experiences. ReviewPro's reputation management tool searches 175 online review sites such as Tripadvisor, Google, Booking.com and Expedia to gather data from visitors' reviews of experiences such as hotels, attractions and restaurants. The tool benchmarks groups of hotels or operators through a Global Review Index (GRI) and conducts sentiment analysis to provide insights about guests' experiences. Businesses accredited under the national Quality Tourism Framework have access to a dedicated ReviewPro dashboard where they can measure their online reputation.

ReviewPro data analysis

Tourism NT utilises ReviewPro's reputation management tool to gather data about all regions in the Northern Territory, including East Arnhem Land. A limited number of tourism businesses operating in the East Arnhem region are currently represented through ReviewPro. The current data provides a base level of insight, however, more work is required to increase the number of businesses with ReviewPro profiles and the number of visitors providing reviews.

ReviewPro data indicates that visitors to the region have a positive experience. Reviews of hotels, tourist spots, and operators in East Arnhem Land are mostly positive, with 64.5% of mentions rated as positive, and an overall GRI of 81.5%. This measure can be compared against the Northern Territory as a whole which recorded 72.4% of mentions rated positive and a GRI of 82.8%.

The East Arnhem Land GRI reflects feedback relating to 13 businesses, including hotels, art galleries, campgrounds, and experiences over the period 2 December 2018 – 2 December 2019.

There were 276 reviews during this timeframe, which was an increase of 61 from the previous period.

Almost half of the online review data collected from ReviewPro came from those travelling for business (55%), with reviews from those travelling as a couple representing 20% and the balance split across those travelling as a family (12.5%), travelling as a group (10%) and travelling alone (2.4%).

Semantic analysis

ReviewPro collates reviews based on their sentiment to determine if there are elements of the visitor experience that individual operators or regions as a whole need to work on improving.

Table 3 - Semantic analysis of reviews (2 December 2019 – 2 December 2020)

Category	Number of mentions	Percentage of positive reviews	Positive elements	Areas of improvement	Observations
Food and Drink	177	84.7%	<ul style="list-style-type: none"> • Food • Restaurant • Chef 	<ul style="list-style-type: none"> • Fish • Menu • Bar 	Overall, the food and drink experience is well received by guests. Reviews indicate restaurants should consider sourcing local produce and refreshing their menus.
Room	78	84.6%	<ul style="list-style-type: none"> • Room • View • Air conditioning 	<ul style="list-style-type: none"> • Landscape • Noise • Cabin 	While reviewed positively, some accommodation providers may need to consider ways to reduce noise for their guests.
Staff	75	97.3%	<ul style="list-style-type: none"> • Staff • Guide • Communication 	<ul style="list-style-type: none"> • Management 	Staff are reviewed very highly. Reviews indicate management may need to be more responsive to guest concerns.
Location	65	92.3%	<ul style="list-style-type: none"> • Location 	<ul style="list-style-type: none"> • Touristic place • Airport 	The location of accommodation and experiences is highly praised.
Value	43	41.9%	<ul style="list-style-type: none"> • Payment 	<ul style="list-style-type: none"> • Price • Quality • Value 	The value for money of the region's tourism offering is perceived as low. While prices reflect the unique and remote location of the region, operators should consider actions that increase perceived value for money.

Northern Territory destination satisfaction research

Destination research was undertaken by Tourism NT from October 2018 to July 2019 to measure satisfaction both overall and with specific aspects of the visitor experience in the Territory's tourism regions.⁴⁸

East Arnhem Land and West Arnhem Land (Arnhem Land) received the second highest overall satisfaction score out of all the regions in the Northern Territory. A mean score of 6.0 for overall satisfaction (on a 7-point scale) was recorded, with 72% of visitors being extremely or very satisfied.

Table 4 - Visitor satisfaction on various aspects of their visit to the Arnhem Land region

Satisfaction aspects	Extremely satisfied (7/7) or very satisfied (6/7)	Mean Score (7-point scale)
Food	57%	5.6
National Parks	87%	6.4
Attractions	83%	6.3
Hotels	41%	5.1
Caravan parks/ camping	73%	5.6
Events	33%	5.0
Tours	100%	6.4
Overall satisfaction with region	72%	6.0

General feedback on Arnhem Land included:

- events received a low satisfaction score, impacted by low attendance of survey participants
- tours received the highest satisfaction score out of all Northern Territory regions
- accommodation was deemed 'satisfactory' given the region's remoteness and the limited choices available
- visitors to the Buku-Larrngay Mulka Centre were 'blown away' by the art
- there is a perceived lack of information about the region's recreational areas and how to visit them
- visitors suggest more local produce be incorporated on menus.

Overall, key findings for the Northern Territory overall include that:

- the warmth and hospitality of the people visitors met on their journey were considered to be the best part of the visitor experience
- intra-Territory visitors would like to see improvements regarding the variety of food and facilities available
- domestic visitors are much more likely to recommend the Northern Territory to others compared to international visitors
- the Northern Territory is considered to be attractive to someone who wants something out of the ordinary, is adventurous and who wants to learn new things.

When considering specific aspects of their visit in the Northern Territory, generally:

- for many, the quality of food exceeded expectations, but a lack of variety of fresh food and options catering to dietary restrictions was an issue
- there was a demand for more bush-tucker experiences
- most people are impressed with the natural beauty of the region
- most people want to experience authentic Aboriginal culture
- staff hospitality was appreciated across Northern Territory
- while most people love caravan park experiences across the Northern Territory, variability was noted.

National operator feedback

A range of national operators were engaged to obtain feedback and insights on market demand for East Arnhem Land and across the NT.

Operators engaged included:

- Crooked Compass
- Broome Kimberley Beyond
- Holidays of Australia
- Helloworld Travel Limited.

Feedback highlighted the following:

- East Arnhem Land is a place that few people have visited, and there is strong demand from tourists to travel to parts of Australia that they have never been before.
- the opportunity for two to three-night packages from Darwin to be developed.
- general lack of awareness and understanding of East Arnhem Land as a destination and the need to educate wholesalers and travel agents about the region, including transport options, what permits are required, and the product and experiences available.
- the need for operators to be 'trade friendly' by investing in distribution and ensuring their rate sheets are clear and easy to read.
- multiple options are required when incorporating cultural tourism into packages to ensure alternative tour locations are available in the event of Sorry Business.
- the frequent delays/cancellation of air services into Gove was raised as a major concern. The high risk of tourists not arriving in Gove before their tour departure results in many tourists arriving one to two days prior to their tour departure. Developing activities and day tours around the Gove Peninsula for these tourists arriving early was cited as a major opportunity as there are currently limited options for tourists.
- the need for airport pick-up/drop-off services was also mentioned to ensure packages could be developed. Prior to COVID-19 an airport shuttle bus did operate, however, the inconsistency of air services into Gove meant these services have been discontinued.
- the need for Gove Airport to have the presence of a major car rental company to ensure car rental can be part of the packages offered through travel wholesalers and travel agents.

Marketing and visitor information services

Marketing activity

Promotion of East Arnhem Land is achieved through a combination of marketing activities planned by Tourism NT, TTE, TEA and individual operators.

The marketing function of Tourism NT is focused on increasing tourism to the Northern Territory by targeting domestic and international markets. East Arnhem Land falls into the Arnhem Land region, which is one of the seven regions marketed by Tourism NT. Tourism NT marketing focuses on digital and social media marketing activities, partnerships with key travel trade partners and strategic media and large-scale campaigns targeted at key visitor segments.

TTE's marketing function is primarily focused on marketing its members which consist of tourism businesses across the Top End, including East Arnhem Land. TTE operates marketing campaigns through its digital assets. Members can join campaigns through cooperative marketing opportunities through TTE's print media and digital partners. TTE works closely with Tourism NT to ensure marketing activities are complementary.

TEA undertakes marketing activities on behalf of the region and its operators to increase destination awareness and encourage visitation. These activities are assisted by DEAL who shares a similar objective to promote tourism to the region and support the growth of the industry. Core marketing activities are currently limited to the regional tourism website, regular social media posts and ad-hoc campaigns.

Where appropriate, the above-mentioned entities work collaboratively to ensure consistent messaging. Tourism NT, TTE and TEA all provide visitor information through their respective websites. TTE and TEA have printed collateral for distribution through VICs and other key points of contact for visitors.

Visitor Information Centres

VICs often act as the first port of call for tourists when they visit a new town or area. Although consumer preferences for online information is putting pressure on VICs in some parts of Australia, many travellers to the Northern Territory are reliant on VICs for up-to-date travel information and product and experience recommendations.

The Top End has two accredited VICs, one in Darwin, operated by TTE and one in Katherine, operated by the Katherine Town Council with support from TTE. Both maintain physical shopfronts with dedicated staff, as well online presences with booking functionality. To be represented in the Darwin and Katherine VICs, operators are required to be TTE members.

Visits to the TTE VIC and Katherine VIC as part of the DMP research indicated East Arnhem Land operators were not well represented across both VICs, indicating further work is required to encourage East Arnhem Land tourism operators to become TTE members and to ensure they send through updated collateral and information for display at the VICs and online.

Conversations with TTE and Katherine VIC management and staff indicate a greater need for regular product updates and resources to assist staff with visitor enquiries, such as maps or permit information.

The NCL operates as the Nhulunbuy VIC through its existing shopfront. The VIC has undergone significant transformation with upgrades to signage, brochure stands and the addition of local crafts to transform the centre into a visitor friendly space. The Nhulunbuy VIC has a dedicated staff member to assist with visitor enquiries five days a week and offers local operators space to display their brochures.



Guwatjorumurru (Giddy River) - Gove Peninsula
Image: DEAL

Northern Territory tourism governance

Various organisations have responsibility for supporting the development and promotion of the East Arnhem Land tourism industry.

National tourism

Tourism Australia (TA) is the Australian Government agency responsible for attracting international visitors to Australia. TA works closely with state and territory tourism organisations to ensure their destinations have exposure in strategic international markets.

Territory tourism

Tourism NT is a NT Government statutory authority responsible for promoting the Northern Territory as a must-do, unique holiday destination. Its role spans domestic and international marketing, industry development and business support, research and business event attraction for the Northern Territory. Tourism NT works closely with TA to support its campaigns and supports the Northern Territory's two regional tourism organisations – Tourism Top End and Tourism Central Australia.

Tourism NT also works closely with Northern Territory Major Events Company to attract visitation to major events across the Northern Territory.

Regional tourism

Tourism Top End (TTE) is an independent, membership-based organisation focused on marketing its members to domestic audiences and providing its members with business support. The TTE tourism region consists of Darwin, Kakadu, Arnhem Land, the Tiwi Islands and Katherine. East Arnhem Land is included in the broader Arnhem Land region.

TTE is also responsible for operating the TTE Visitor Information Centre in Darwin and supports the Katherine Town Council in operating the Katherine Visitor Information Centre.

Tourism organisations hierarchy

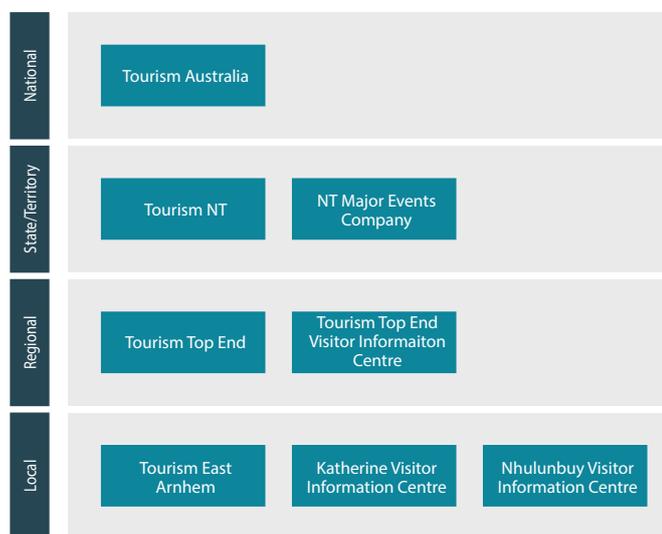


Figure 10 - Tourism governance hierarchy in the context of East Arnhem Land

Local tourism

Tourism East Arnhem

Tourism East Arnhem (TEA), formally the East Arnhem Land Tourist Association, is the local tourism organisation for the East Arnhem Land region. It is a membership-based organisation, run by a volunteer committee. It seeks to promote cooperation between local operators and advocates on behalf of the region on tourism-related matters.

Developing East Arnhem Limited

DEAL is an independent, not for profit economic development organisation that facilitates planning and coordinated action to support industry development across the East Arnhem Land region. DEAL, through its tourism development officer, provides secretariat duties on behalf of the TEA committee. DEAL actively promotes the region, supports businesses to navigate development processes, advocates on behalf of the region and coordinates planning and action to develop regional focus industries, such as tourism.

Nhulunbuy Corporation Limited

Nhulunbuy Corporation Limited (NCL) is a public company limited by guarantee that manages the township of Nhulunbuy, the nearby industrial estate and the Gove Airport in a similar manner to that of a local government. NCL operates the Nhulunbuy Visitor Information Centre and works closely with DEAL and TEA to provide visitor servicing for the region.

Northern Territory tourism regions

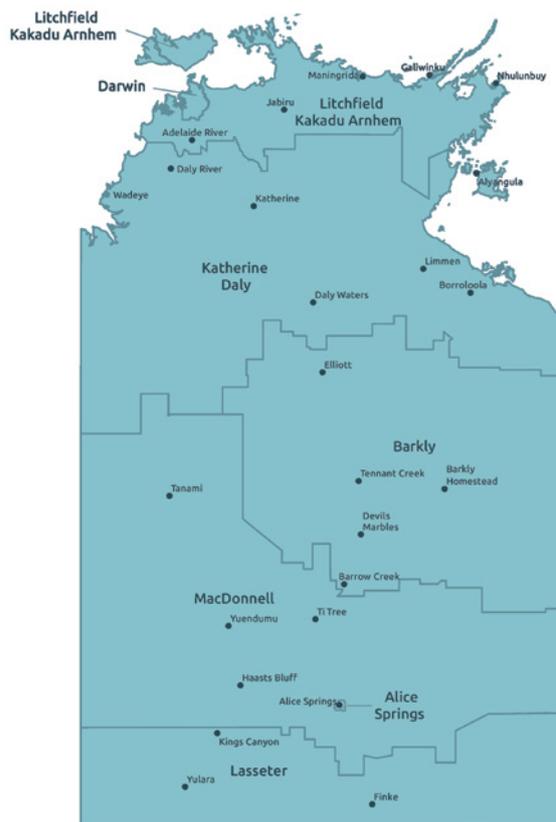


Figure 11 – Northern Territory Tourism Regions as defined by TRA



East Arnhem Live hosted by Banubanu Beach Retreat, Bremer Island - Gove Peninsula
Image: DEAL



Section 3 Destination Development Strategy



*Dhipirri Barra & Sportfishing Lodge - Milingimbi and Crocodile Islands
Image: Tourism NT/Shanaa McNaught*



Introduction

The Destination Development Strategy consists of the following sections:

- **Destination vision** – the vision for how East Arnhem Land is viewed by consumers
- **Industry vision** – the vision for how the tourism industry benefits the people of East Arnhem Land and contributes to the regional economy
- **Comparative advantages** – how the region compares to other parts of the Northern Territory
- **Key development themes** – focus areas of development to grow the tourism industry in East Arnhem Land
- **Product development opportunities** – opportunities for new product development based on cultural, environmental and geographical features of East Arnhem Land and regional tourism trends
- **Sub-regional development projects** – infrastructure and tourism development projects in each sub-region of East Arnhem Land as identified through stakeholder engagement.

Destination vision

By 2031, East Arnhem Land will be a high-quality, year-round bucket list destination, which is internationally recognised for its cultural significance and natural beauty and is affordable to access by land, air and sea.

Industry vision

By 2031, the East Arnhem Land visitor economy will be a key driver of regional economic growth, while remaining culturally, environmentally and economically sustainable. Led by Traditional Owners and supported by public and private investment, tourism development will be strategically and collaboratively coordinated to ensure it contributes to the empowerment of Yolŋu and Anindilyakwa peoples through skills development, employment and increased intercultural understanding.

Comparative advantages



Yolŋu and Anindilyakwa cultural immersion and learning experiences

East Arnhem Land is home to incredibly rich Yolŋu and Anindilyakwa culture, both of which are among the oldest living cultures on earth. The region offers a unique and unrivalled opportunity for cultural immersion, allowing visitors to learn from custodians of 65,000 years of culture. Heavily connected to the region's strong culture is the region's art sector. Art centres in each major community focus on creating spaces for artistic creativity and cultural preservation. The region is also the birthplace of the yidaki (didgeridoo) and is one of Australia's most musically rich regions being home to bands such as Yothu Yindi, East Journey, King Stingray along with individual artists Yirrnga Yunupingu, Andrew Gurruwiwi, Emily Wurramara, and Baker Boy among others.



Drive history

East Arnhem Land is home to incredibly rich Yolŋu and Anindilyakwa culture, both of which are among the oldest living cultures on earth. The region offers a unique and unrivalled opportunity for cultural immersion, allowing visitors to learn from custodians of 65,000 years of culture. Heavily connected to the region's strong culture is the region's art sector. Art centres in each major community focus on creating spaces for artistic creativity and cultural preservation. The region is also the birthplace of the yidaki (didgeridoo) and is one of Australia's most musically rich regions being home to bands such as Yothu Yindi, East Journey, King Stingray along with individual artists Yirrnga Yunupingu, Andrew Gurruwiwi, Emily Wurramara, and Baker Boy among others.



Unique natural environment

The unique and unparalleled natural environment and breathtaking landscapes of East Arnhem Land make the region a pristine paradise.

The white sand beaches and azure waters of the Arnhem Land coastline support an abundance of marine megafauna and host a number of species sought after by recreational fishers, such as barramundi, black marlin, sailfish and reef fish, appealing to the recreational fishers.

The lands and seas of East Arnhem Land have been carefully managed for tens of thousands of years through continuous, holistic Indigenous land and sea management practices underpinned by sophisticated interconnected, ecological and spiritual knowledge. These management practices continue with the support of local ranger groups who are also tackling the threatening issues of feral animals, weeds and marine debris to ensure these environments remain pristine and healthy.



Adventure drives

The Central Arnhem Road has the potential to be one of Australia's iconic outback adventure drives. Visitors can get off the beaten track and encounter a large variety of wildlife as they journey over the Arnhem plateau and across ancient landscapes.

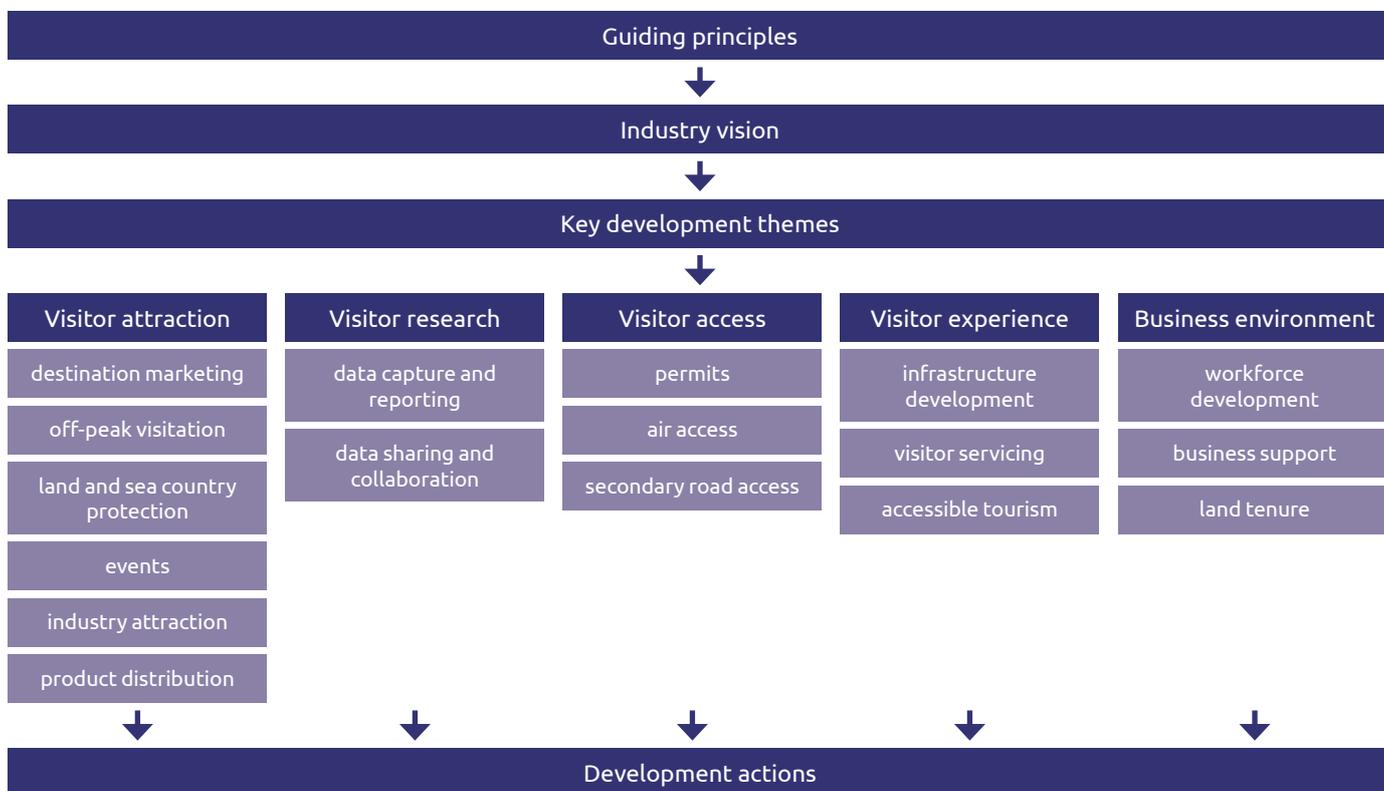
Many of the region's recreational areas, such as the route to Cape Arnhem, require challenging sand driving that appeals to the adventure drive market.

Roads such as the SEAL Track and the Top Track also have the potential to be developed into 4WD adventure drives.

Key development themes

The key development themes were distilled from ideas, research and feedback gathered during the regional workshops and consultations.

There are five key themes which are separated into 17 focus areas.



Actions are attributed to each key development theme for the purpose of progressing issues that are limiting the growth of the tourism industry. Organisations responsible for each action are suggestions and will be confirmed by the PIT.

Lead - organisation(s) responsible for implementing the action.

Partners - organisation(s) responsible for supporting the lead organisation(s) in implementing the action.

Explanation of timeframes:

- ongoing – activities that will continue as usual
- short term – 1-2 years
- medium term – 2-5 years
- long term – 5-10 years.

Visitor attraction

Destination marketing, promotion and awareness

Consumer awareness of the East Arnhem region, access requirements and its product offering is low but consumers recognise a broad connection between the region and Aboriginal Australia.⁴⁹ Over the past decade, the region has suffered from a lack of coordinated destination marketing efforts. This has improved recently with TEA, TTE and Tourism NT having increased their collaboration and focus on ensuring the region is represented through appropriate campaigns through the year.

Compared to other regions of the Northern Territory, East Arnhem Land is not heavily represented through marketing campaigns due to the region having a lower number of bookable tourism experiences and therefore expected low return on investment from promotional activity. Programs run by TTE and Tourism NT are currently focused on increasing the number of businesses across the Northern Territory that are bookable online.

Local operators must engage regularly with TTE and Tourism NT to develop their marketing ability and knowledge to ensure they maximise the marketing opportunities available. Given much of the region's product is not available through consumer-friendly trade distribution channels, current marketing efforts do not reach their full potential.

East Arnhem Land has the potential to be marketed as a Northern Territory bucket list destination as it rivals the cultural significance of other destinations in the Northern Territory. If developed well, it has the potential to be a destination of international significance.

Effective promotion is required to increase consumer awareness of the region as a destination and to drive visitation, product development and private investment.

Off-peak visitation

Like other regions of the Top End, the peak tourism season in East Arnhem Land is during the middle of the year. Accommodation providers and campground operators on the Gove Peninsula report that their facilities operate at near capacity over the dry season months of June, July and August. While there is a need to increase accommodation capacity in Nhulunbuy, there is an opportunity to encourage visitation over the shoulder seasons of April, May and September.

The weather during these months remains pleasant (lower humidity and less chance of rain) and access via the Central Arnhem Road is unlikely to be restricted, allowing tourists to undertake the same experiences available during the peak season.

Reducing consumer concern about visiting during the shoulder season and increasing consumers' awareness of their options to visit is key to growing visitation over these months.

Given the high demand for accommodation and camping over the dry season, there may be an opportunity for operators to implement seasonal pricing linked to demand to encourage visitation over the shoulder season. There is also an opportunity to market the region as a school holiday destination to Territorians.

Sectors such as recreational fishing and cruise already operate successfully over the shoulder and off seasons and further development of these sectors would increase the appeal of visiting outside peak season.

Land and sea country protection

The comparative advantages of East Arnhem Land are heavily reliant on the health of the region's land, coastal and marine environments. Much of the land and sea country that makes up the East Arnhem region is currently managed through the Indigenous Protected Areas (IPA) framework. IPAs allow Indigenous Australians to play a lead role in managing areas of significance through the combination of traditional and contemporary conservation techniques.

The Arnhem Land coast consists of some of the last intact tropical ecosystems in the world, offering habitats for threatened marine species, migratory shorebirds and game fish, such as barramundi.

Well managed environments strengthen the region's comparative advantages, encouraging visitation and supporting most of the product development opportunities identified on page 60.

Events

East Arnhem Land has a modest calendar of events over the dry season that incorporates community markets, sporting competitions and cultural festivals. Most of these events cater to the local communities in which they operate and are not widely promoted to audiences outside the region.

Outside of this, the Garma Festival of Traditional Cultures (Garma), hosted annually on the Gove Peninsula at the Gulkula site, is the region's most well-known event. It has steadily grown to become Australia's largest Indigenous cultural gathering and in 2019 drew an attendance of 2,600 over four days and nights. Eighty percent of attendees were from outside the Northern Territory including 5% from abroad.⁵⁰ Over the course of the four-day event, there is an influx of people to the Gove Peninsula. During this time, Nhulunbuy suffers from a lack of accommodation and restaurant capacity, with most visitors camping and eating at the site. Regular flight schedules to Gove Airport also need to be supplemented with additional flights to satisfy demand.

The region is also well known for its fishing competitions with multiple events held throughout the year. The Airnorth Ladies Fishing Classic, held between March and April each year, is estimated to be the largest annual women's fishing competition in Australia.⁵¹

Currently, dates of the region's smaller events are announced without sufficient lead-time to organise campaigns to encourage visitation. With adequate notice, operators and visitor information centres would be able to capitalise on events by offering event-themed packages.⁵²

There is a considerable opportunity to promote the region's existing events to a wider audience and to create new sporting events and festivals to encourage visitation, particularly over the shoulder and off seasons.

Industry attraction

Expedition cruise ships

The expedition cruise market is an emerging source of visitation to the region. Growing the number of expedition cruises to the region represents a major opportunity to grow tourism to locations not easily accessible by land, such as Elcho Island and Groote Eylandt.

The process of organising port visits to East Arnhem Land can be confusing and cumbersome for cruise operators. Onshore activities are organised at the request of cruise operators one to two years in advance and there is currently limited information available to assist cruise operators to plan their visit to the region.

Cruise arrivals are infrequent and shore activities are usually developed on an ad-hoc basis. To encourage growth of the expedition cruise market, current shore excursions require formalisation and promotion. This will enable cruise companies and their ground handlers to organise visits with ease.

Most of the economic benefits from cruise arrivals currently centre around the port of call's art centres and fees for cultural performances and activities. Efforts need to be made to increase the level of community involvement in port calls by organising events such as markets to correspond with cruise arrivals.

Art centres consulted as part of this plan indicated that they are interested in working with cruise ships and recognised the benefits to their business and the community as whole. Art centres, however, found requests for tours outside of normal operating hours difficult to accommodate with current resources.

The Northern Territory coast is rich in natural assets and is home to a number of diverse cultures. There is an opportunity to work with Traditional Owners along the Northern Territory coast between Darwin and East Arnhem Land to identify areas which can be opened to shore excursions. Obtaining the relevant permissions to access these sites would create enough diverse experiences for dedicated cruises to run between Darwin and Nhulunbuy.

Communities and homelands interested in cruise tourism will need to develop unique product offerings that is scalable depending on the number of passengers arriving. Investment in enabling infrastructure and assets, such as ground transportation, will also be necessary for the cruise market to expand into the region.

The combination of diverse natural assets, Yolŋu art centres, World War II history and intimate cultural immersion make the East Arnhem region an appealing destination to cruise companies.

There is also an opportunity to work with the Department of Agriculture, Water and Environment to reinstate biosecurity first point of entry status for Melville Bay and Milner Bay for recreational and passenger vessels. Reinstating first point of entry status to these ports would create conditions for future growth of the expedition cruise and yacht markets and allow for cruise itineraries that leave Australian waters (to visit Indonesia or Papua New Guinea).

Yachts

The superyacht sector is a small but growing source of visitation, with high economic contributions to the Australian economy. Guests aboard are often high net worth or ultra-high net worth individuals. There is an opportunity to modify some of the onshore cultural activities developed for expedition cruises to cater to tourists arriving by superyacht.⁵³

Tour operators

The region's remoteness lends itself to the opportunity for larger tour operators to partner with local operators to create guided experiences across East Arnhem Land and beyond. The small group adventure market and the tag-along tour market have been identified as having the greatest potential to disperse tourists throughout the region.

The tag-along tour market is currently small, averaging two to three tours a year. With greater marketing exposure, combined with product development along the Central Arnhem Road, there is potential to increase the number of tours visiting the region.

The opportunity exists for tour operators to create small group, adventure tours departing from Nhulunbuy, as the region's primary accommodation provider and main air entry point. This market is also expected to grow over the coming years and has shown potential in the past. Intrepid Travel previously marketed seven-day tours to the region, however, these never eventuated. These tours have been relaunched in 2021.

Multi-day, guided tours that combine the very best of East Arnhem Land would solve the accessibility challenges faced by consumers interested in visiting the region.

Product distribution

Online bookable product

Significant differentiation currently exists between the region's tour operators when it comes to accepting bookings online. Some operators offer their product as instantly bookable, while others only accept direct bookings over the phone or via email.

Having product bookable online allows potential visitors to place a booking at a time most convenient to them, without needing to worry about calling ahead of time or finding time to contact the business within its operating hours. There are two tiers of online bookable product: online booking request (operator needs to manually confirm the booking) and instant booking confirmation (booking is automatically confirmed). Modern consumers prefer instant booking confirmation as it gives them peace of mind by knowing that their purchase has been confirmed immediately.

As consumers continue to choose convenience when making purchasing decisions, it is imperative that operators that have not yet transitioned to accepting bookings online do for the region to remain accessible to free and independent travellers. Having product inventory and bookings available online also allow operators to broaden the reach by offering their product through multiple distribution channels, such as online travel agents.

Product packaging

There is a lack of packages available for purchase to make visiting East Arnhem Land easy and convenient. Most travellers to the region plan and coordinate their own trip, organising flights, accommodation, tours and permits separately. This can be a time-consuming process.

Product packaging offers many benefits to visitors. Packages offer convenience to potential visitors by reducing the amount of time required to research their destination. Packages also provide everything they need for their trip in a single purchase.

Opportunities exist for operators to partner together to offer their product as part of a package. Packages can be marketed directly to consumers by the operators themselves or sold through travel agencies.

Actions - Visitor attraction

#	Development theme	Action	Lead	Partners	Timeframe
1	• Destination marketing	Embracing the region's identity, develop marketing material to identify product as East Arnhem Land and West Arnhem Land.	• Tourism NT	• Operators • TEA • DEAL	Short term, then ongoing
2	• Destination marketing	In line with the Northern Territory Drive Tourism Strategy 2021-2030 (Drive Strategy), continue to undertake marketing activities that promote East Arnhem Land to the adventure drive market.	• TEA • DEAL	• Tourism NT • TTE	Short term, then ongoing
3	• Destination marketing	Leveraging the broader NT brand and destination marketing activities, develop and define a regional identity.	• PIT	• Tourism NT • TEA	Short term, then ongoing
4	• Destination marketing	Implement Drive Strategy actions relevant to the East Arnhem region.	• Tourism NT	• TEA	Short term, then ongoing
5	• Destination marketing • Off peak visitation	Establish a yearly regional marketing campaign for East Arnhem Land designed to increase awareness and drive bookings to the region among key visitor markets.	• TEA	• DEAL	Short term, then ongoing
6	• Destination marketing	Among those able, increase the opportunity for operators to host familiarisation tours for distribution partners to increase awareness of product among key distribution partners.	• Tourism NT	• TEA • DEAL	Medium term, then ongoing
7	• Destination marketing	In partnership with NT Business Events, develop marketing materials to promote the region as a destination for small scale business events.	• DEAL • Tourism NT	• Operators	Medium term, then ongoing
8	• Land and sea country protection	In line with aspirations of Traditional Owners, support interested land management organisations to develop tourism product that complement or leverage their existing activities.	• PIT	• DEAL	Medium term
9	• Events • Product distribution	Facilitate the creation of event specific packages to maximise the economic benefits of the current calendar of events. Event organisers to work with operators to sell 'add-on' packages when selling event tickets.	• Operators • Event organisers	• DEAL	Short term
10	• Events	Facilitate the development of new events to encourage visitation.	• DEAL • TEA	• Tourism NT • Operators	Short term

#	Development theme	Action	Lead	Partners	Timeframe
11	• Events	Assist community groups with planning of events. Assist community groups with aligning their events to Northern Territory-wide events and marketing campaigns to maximise exposure.	• DEAL • NCL	• Tourism NT • Operators	Short term
12	• Events	Develop a regional events strategy.	• DEAL	• Tourism NT • Operators	Medium term
13	• Industry attraction	Progress the actions relevant to the East Arnhem Land region in line with Tourism NT's strategic plans for the cruise sector.	• Tourism NT	• DEAL	Ongoing
14	• Industry attraction	Convene an expedition cruise working group to coordinate activities and facilitate the sharing of information between ports.	• DEAL	• Tourism NT • Operators • NLC	Short term
15	• Industry attraction	Develop a guide to market the region to cruise operators and to assist cruise ships in planning their voyages to the region. Identify key community organisers at each port to coordinate planning and preparation of onshore activities.	• DEAL	• Tourism NT	Short term
16	• Industry attraction	In line with Tourism NT's strategic plans for cruise, and with support from land councils and operators, begin identifying potential shore excursion opportunities along the Arnhem Land coast including Traditional Owner support for allowing access.	• DEAL	• NLC • ALC • Tourism NT • Operators	Short term
17	• Industry attraction	Work with interested communities and homelands to develop distinct onshore activities to increase port visits to the region during the same voyage.	• DEAL • Operators	• Tourism NT	Medium term
18	• Industry attraction	Work with the Department of Agriculture, Water and Environment (Australian Government) to support discussions for first point of entry status for recreational and passenger vessels to be reinstated for Melville Bay and Milner Bay.	• DEAL	• DCM&C • NIAA	Medium term
19	• Product distribution	Build business participation in travel distribution.	• Operators • Tourism NT	• TTE • DEAL	Short term





Visitor research

Data capture and reporting

Currently Tourism Research Australia (TRA) incorporates East Arnhem Land into a broader reporting region called Litchfield Kakadu Arnhem.⁵⁴ This region incorporates Litchfield National Park, Kakadu National Park, Tiwi Islands and broader Arnhem Land. Any visitation trends coming out of East Arnhem Land are unlikely to be apparent when the region represents such a small percentage of the overall reporting region’s visitation. Significant tourist attractions such as Kakadu National Park and Litchfield National Park are likely to dominate any trends coming out of this data.

Similarly, Tourism NT currently reports visitation trends for East Arnhem Land using a region Kakadu Arnhem.⁵⁵ This region is similar to the TRA region Litchfield Kakadu Arnhem, however, has been modified to exclude Litchfield National Park from the data. While not publicly reported, limited visitation data (visitor numbers and nights) is available for the East Arnhem region through the data collected by the National Visitor Survey and International Visitor Survey.

The region requires timely and accurate data to track the success of the DMP, to identify visitor trends and to enhance marketing efforts.

Data sharing and collaboration

Data held by various organisations can be useful to measure various aspects of the region’s visitor economy and to identify trends.

Tourist data collected by operators and government can be used to measure trends such as number of visitors, length of stay, accommodation occupancy, mode of transport to the region and growth in individual sectors.

Organisations should be encouraged to share their data with a central body that can then analyse the data and report the findings back to industry and relevant departments.

It is important this data is anonymised where necessary to ensure privacy is maintained. Consideration will also be required for data that may be commercial in confidence.

Actions - Visitor research

#	Development theme	Action	Lead	Partners	Timeframe
20	• Data and research	Undertake surveys of visitors at key visitor touch points to gain better understanding of visitor trends	• NCL • DEAL	• Tourism NT	Short term
21	• Data and research	Upgrade current ‘coverage station’ road monitors along the Central Arnhem Road to ‘primary stations’. Upgrades would increase data collection from 2-3 months over the dry season to year-round monitoring and better capture road traffic trends.	• DIPL	• Tourism NT • AARWG	Medium term
22	• Data and research	Increase number of road counters along the Central Arnhem Road from two to eleven primary stations to better capture road usage and traffic flows.	• DIPL	• Tourism NT • AARWG	Medium term
23	• Data and research	Once visitation increases to a sufficient level, create reporting region of ‘Arnhem Land’	• Tourism NT	• TRA	Long term
24	• Data sharing and collaboration	Convene a regional tourism data working group to allow tourism operators and government agencies to share and collate visitor data for the purposes of measuring the visitor economy.	• DEAL	• Tourism NT	Short term



Visitor access

Permits

Entry to Aboriginal land requires permits under Commonwealth and Northern Territory legislation. Permits are written permission from Traditional Owners to visit their land. The permit system is designed to help ensure community privacy, preserve culture, safeguard the environment and promote visitor safety. There is a low level of awareness of the importance of permits for Aboriginal communities within the general population.

There are multiple permits issued across the East Arnhem region from multiple authorised organisations that are relevant to visitors. This can lead to confusion from travellers not knowing where to start to obtain the correct permits for their journey.

Some consider permits to be a major barrier to visitation as they require visitors to take additional steps to plan their travel. Some permits attract fees, which may act as a further barrier to visitors. Permit systems that are not quick and intuitive to use can lead to visitors not obtaining permits or abandoning their plans altogether to visit the region in favour of a destination without permits.

Permits may also be perceived negatively by tourists, signalling that visitors are not usually welcome. Additionally, the uncertainty around penalties for non-compliance may also intimidate travellers who worry they may be penalised for an unintentional error, such as applying for the wrong permit.

The process of obtaining permits for the Yolngu region of East Arnhem Land has streamlined significantly with the introduction of new online permit systems for the NLC and Dhimurru Aboriginal Corporation (Dhimurru) in mid-2020.

Educating consumers and industry about permit requirements and processes should remain a priority for the tourism industry in East Arnhem Land. For permits that require a fee, permit issuers should consider providing information to educate visitors about how the money collected through permits is used. There is also an opportunity for industry to begin to change the narrative around permits to be more inclusive of travellers.

Table 5 – Permits that may be applicable to visitors to East Arnhem Land

Permit name	Issuer	Purpose	Cost
Transit Permit	NLC	To drive between the Stuart Highway and Nhulunbuy, along the Central Arnhem Road.	Free
Recreation Permit	NLC	Visiting identified recreational areas on Aboriginal land	Free
Blue Mud Bay – Tidal Fishing Permit	NLC	For recreational fishers who wish to access the intertidal zone	Free
Visitor Access Permit	Dhimurru	Access to identified recreational areas within the Dhimurru Indigenous Protected Area (IPA)	Paid
Camping Permit	Dhimurru	Permission to camp at designated sites within the Dhimurru IPA	Paid
Recreation Area Access Permit	ALC	Access to designated recreation areas across the Groote Archipelago	Paid
Special Access Permit	ALC	Visiting Aboriginal land outside designated recreation areas across the Groote Archipelago	Free
Liquor Permit	Licensing NT	Permission to purchase and consume takeaway alcohol in Nhulunbuy and Alyangula	Free

Air access

Air access to East Arnhem Land is often prohibitively expensive. Return flight costs between cities in the south of Australia and Nhulunbuy can cost a family of four up to \$8000.⁵⁶ At this price point, east coast residents can fly to major cities in Europe for a similar cost.

Major communities outside Nhulunbuy face similar challenges with the cost and reliability of air services. Scheduled flights from Darwin to major communities outside of Nhulunbuy can cost over \$600 for a one-way flight. These flights are frequently cancelled with limited notice, leaving travellers stranded.

With the mining industry on the Gove Peninsula set to shrink dramatically over the next ten years, there are concerns flight services to Nhulunbuy from Cairns and Darwin will be reduced in frequency due to reduced demand and the possible population reduction. These factors are likely to put further pressure on flight costs and frequency of services.

Flight reliability is also a major concern. It is not uncommon for flights to Nhulunbuy and Groote Eylandt to be delayed or cancelled without advanced warning. This creates uncertainty for tourists and operators who require flights to arrive on time.

To enable tourist access to Nhulunbuy and other major communities in East Arnhem Land, there is a strong need to reduce the cost of airfares and improve reliability of current services. High airfare cost hinders product development, especially for destinations where air access is the only option.

Road access

Central Arnhem Road upgrades

Self-drive tourists visiting East Arnhem Land must be prepared for the journey along the Central Arnhem Road. A high clearance four-wheel drive (4WD) vehicle, spare tyres and extra fuel are all recommended. A satellite phone is also suggested as there is limited mobile coverage along the route. The preparation required substantially increases the overall cost of visiting the region and excludes more price-sensitive visitor markets. Car trouble arising from corrugations and car accidents can occur due to poor road conditions. Wet season weather can force the closure of the road at short notice and can dramatically change road conditions and transit times with little notice. While these closures are infrequent, they represent a physical and psychological barrier to visitation. Substantial works over the past five years have improved the condition of the road, which has allowed for more road freight and visitors towing campervans to access to the region. These works have also decreased the number of days the road is inaccessible. Increased traffic subsequently reduces the quality of the road.

The Northern Territory and Commonwealth Governments have committed \$225 million dollars over ten years (2019 – 2029) to upgrade sections of the Central Arnhem Road. The upgrade will involve sealing, reconstructing, widening and flood immunity improvements to priority sections of the road to a fit-for-purpose standard. While these upgrades are expected to benefit the tourism industry with increased tourist traffic to the Gove Peninsula, additional funding is required to seal the entire length of the road. Sealing the road allows visitors to confidently visit the Gove Peninsula any time of the year, without regard for weather conditions and opens the region to the broader self-drive market. Improved road conditions will reduce travel times, allow for increased public transport options, lower costs of doing business and greater driver safety.

Secondary access to the region

The Central Arnhem Road remains the single point of road access to East Arnhem Land for the majority of visitors. While access to the SEAL Track between Numbulwar and the Central Arnhem Road near Gapuwiyak and Top Track between Jabiru and Ramingining are possible for travellers with valid permits, these permits are currently only issued to essential workers requiring access between these communities, or to residents of homelands along these routes.

There is only one tour operator with permissions to travel the Top Track from Ramingining to Jabiru via Maningrida and Gunbalanya. Among other tour operators that visit the region, there is a high degree of interest in opening at least one of the two roads to visitor traffic as it would open up the possibility of an Arnhem Land loop and allow tourists to see a greater proportion of Arnhem Land. A new drive route connecting the region would create tourism-related economic opportunities for Yolŋu and other Aboriginal people outside of East Arnhem Land.

The SEAL Track holds considerable opportunity to be developed and opened to recreational traffic. Work done by Middle Star Pty Ltd in 2015 indicates that there was strong interest from multiple homelands to develop visitor experiences to cater to traffic along the route.⁵⁷

Further discussions with Traditional Owners are required in relation to opening and developing the Top Track to welcome tourist traffic given the location of the track and cultural sensitivities that can arise.

Homelands access

Many of the opportunities for tourism development in East Arnhem Land are on homelands outside major towns and communities.

Throughout the wet season, many homelands become isolated due to substantial flooding and/or water damage to their primary access road and/or airstrip. This affects the mobility of homelands residents to purchase food and other necessities and often means these homelands are uninhabited for several months until access can be re-established. Since many homelands are inaccessible during the wet season, there are limited opportunities to host tourists that may choose to visit over the wet season.

There is an opportunity to upgrade access roads to all-weather or nearly all-weather standard to ensure homelands are viable year-round and support opportunities for economic development, such as tourism.

Homelands access roads are maintained by the applicable homeland service provider. Discussions with service providers indicate that funding for homelands services, including access road maintenance, is proportional to the number of homelands residents. Service providers express concern that if a homeland were to start welcoming tourists, the relevant access road to the homeland would require maintenance more frequently for which they are not funded adequately to provide.

Homelands and their service providers should consider the implications of tourist road traffic and, if required, how additional road maintenance is funded.

Actions - Visitor access

#	Development theme	Action	Lead	Partners	Timeframe
25	<ul style="list-style-type: none"> Permits 	Find innovative ways to increase visitor awareness about the importance of permits and which permits are required for their journey and how to apply for them.	<ul style="list-style-type: none"> NLC DEAL Dhimurru 	<ul style="list-style-type: none"> Tourism NT 	Short term
26	<ul style="list-style-type: none"> Permits 	Work with permit issuing bodies to allow third parties such as VICs to apply for permits on behalf of visitors.	<ul style="list-style-type: none"> NLC Dhimurru 	<ul style="list-style-type: none"> DEAL Tourism NT TTE 	Medium term
27	<ul style="list-style-type: none"> Air access Industry attraction 	Continue talks with air carriers to improve affordability and reliability of current passenger services to the region.	<ul style="list-style-type: none"> RRC 	<ul style="list-style-type: none"> Airport Development Group DEAL NCL ALC Tourism NT 	Medium term
28	<ul style="list-style-type: none"> Air access 	Explore options to reinstall airport security services to Gove Airport to allow passenger baggage to be checked through to their final destination, rather than requiring rechecking on arrival to Cairns or Darwin.	<ul style="list-style-type: none"> NCL 	<ul style="list-style-type: none"> DCMC 	Long term
29	<ul style="list-style-type: none"> Road access Air access Infrastructure investment 	In relation to community and homelands access roads: <ul style="list-style-type: none"> continue discussions on levels of funding for community and homelands access roads to ensure it is sufficient to meet the needs of residents and the tourism industry collaboratively agree an approach to increased or additional maintenance requirements to community and homelands access roads as a result of increased tourism traffic explore options to upgrade air strips on homelands for year-round use. 	<ul style="list-style-type: none"> East Arnhem Regional Council Homelands service providers LGANT Operators 	<ul style="list-style-type: none"> DEAL DCMC NLC NIAA 	Ongoing
30	<ul style="list-style-type: none"> Road access Infrastructure investment 	Prioritise communications infrastructure to address 'black-spots' along the Central Arnhem Road and access roads to communities and homelands to increase visitor safety.	<ul style="list-style-type: none"> Tourism NT 	<ul style="list-style-type: none"> PIT DCDD 	Ongoing
31	<ul style="list-style-type: none"> Road access Visitor Servicing 	Create visitor information specific to the Central Arnhem Road for self-drive visitors focused on safety considerations, driving conditions and suggested itineraries.	<ul style="list-style-type: none"> TEA 	<ul style="list-style-type: none"> DEAL Tourism NT 	Short term
32	<ul style="list-style-type: none"> Road access Industry attraction Infrastructure investment 	In line with the Drive Tourism Strategy, work with Traditional Owners, regional stakeholders, and industry to open the SEAL Track and Top Track to recreational traffic.	<ul style="list-style-type: none"> DIPL 	<ul style="list-style-type: none"> DEAL DIPL NLC Homelands service providers Tourism NT 	Long term

Visitor experience

Infrastructure investment

Central Arnhem Road visitor infrastructure

There are currently limited stops available to break up the drive between Katherine and Nhulunbuy and most of the stops that exist are located towards the Katherine end of the road. This results in travellers driving the entire length of the road within the same day or with one overnight stopover at the Mainoru Store. Currently, accommodation along the route is limited to Djilpin Arts in Beswick; the Mainoru Store at Mainoru Station; and the Dholuwuy Campgrounds at Baniyala.

The Central Arnhem Road has the potential to grow into one of Australia's iconic outback drives akin to the Kimberley's Gibb River Road or Cape York's Old Telegraph Track.

The Central Arnhem Road Visitor Experience Review, completed in 2019, identified infrastructure and facilities required to increase convenience, comfort and pleasure for the self-drive market.⁵⁸ The report identified locations for information bays, government-sanctioned signage, hotspots for mobile reception, rest stops, toilets and dump points.

Homelands infrastructure

Homelands offer visitors the opportunity to spend time on country, immersed in culture and the chance to experience a lifestyle different from their own. Yolŋu and Anindilyakwa feel most comfortable engaging with tourists on their homelands because it is their ancestral home and their country. They are intimately familiar with the landscape and the environment, which allows visitors to have authentic and engaging experiences.

Many homelands interested in welcoming tourists require facilities such as electricity, potable water, toilets and lodgings to meet basic market expectations. Usually, tourists will stay in a separate section of the homeland, outside of the main centre, to safeguard residents' right to privacy.

While homelands often have a landline connection, the lack of mobile telecommunications on homelands makes it difficult for tourism operators based on country to take bookings, liaise with clients and respond to enquiries.

Visitor safety is of real concern to tour operators and their clients. Staying on homelands presents a risk to clients as medical care may not be readily available. Careflight, which operates the Top End Medical Retrieval Service, is limited in the homelands it services. While most homelands have airstrips, not all are long enough to support the safe landing of Careflight aircraft. Night-time medical retrievals are also limited to communities with airstrips with the appropriate equipment to facilitate landings in the dark.

Similar to access road maintenance, homelands service providers express concern about the impact tourism has on essential services such as electricity and water. Discussions between homelands tourism operators and service providers about how essential services are delivered and who is responsible for maintenance will be required to ensure economic opportunities can be realised.

For tourism on homelands to succeed, multifaceted infrastructure investment is required.

Marine infrastructure

Much of the region's tourism activity occurs close to, or on, the ocean. Marine infrastructure is vital to facilitate mobility between communities and homelands.

The Gunyanjara (Gove Port) Tourism Precinct (under development) is intended to be the primary point for marine-based tourism on the Gove Peninsula. The facility is being designed to create a safe and welcoming area for visitors arriving by yacht and cruise ship, while also being the primary point for day cruises and fishing charter operations.

Outside the Gove Peninsula, the region lacks adequate marine infrastructure to operate recreational and commercial marine activities. Due to the significant tidal variation, jetties are required in the communities of Milingimbi, Ramingining and Galiwin'ku to enable activities such as fishing charters and homelands excursions.

Jetties would also enable these communities to attract the yacht market, by offering a safe place for sailors to come ashore and resupply. Jetty facilities would also enable expedition cruise ships to safely transfer passengers from tenders to shore for excursions.

Visitor servicing

Visitor servicing plays an important role in providing visitors with accurate information for them to make informed decisions about their travel. Making visitors feel welcome and supplying the correct information for their trip is integral to creating an appealing tourism destination.

The region's remoteness and uniqueness as entirely Aboriginal land necessitates that visitors have accurate and timely information for their journey and to ensure safety and compliance with relevant legislation, in particular access permits.

There is a low level of awareness among operators about the current visitor information services available to tourists. Accommodation providers and tour operators on the Gove Peninsula and along the Central Arnhem Road report they are often asked by tourists for information about campsites, things to do and permits. These operators often act as the first point of contact for many visitors and play an essential role in the region's visitor services network.

There is an opportunity for further collaboration between operators to share product updates to ensure the industry is continually up-to-date with the latest tourism developments in the region. This would also ensure that operators are able to give timely advice and share resources with tourists.

Enhanced dialogue between operators and VICs across the Top End is also required. This is essential in ensuring visitors and VIC staff have access to up-to-date information on the region and its operators. There is also a need for East Arnhem Land to have a distinct presence in VICs across the Top End. East Arnhem Land is currently coupled with West Arnhem Land under the umbrella of 'Arnhem Land'. There is a risk that self-drive visitors may assume East and West Arnhem Land are connected, which is not currently the case for recreational purposes.

Table 6 - Organisations offering visitor services for East Arnhem Land

Organisation	Services provided
NCL	<ul style="list-style-type: none"> Nhulunbuy VIC Visitor enquiries by phone
DEAL	<ul style="list-style-type: none"> eastarnhemland.com.au Visitor enquiries via email and social media
TEA	<ul style="list-style-type: none"> Printed itineraries and maps
TTE	<ul style="list-style-type: none"> TTE VIC Visitor enquiries by phone and email
Katherine Town Council (in collaboration with TTE)	<ul style="list-style-type: none"> Katherine VIC Visitor enquiries by phone and email

Accessible tourism

Accessible tourism is an ongoing endeavour to ensure tourist destinations, product and services are accessible to all people, regardless of their physical limitations, disabilities or age.⁵⁹

Tourism infrastructure that is accessible is also beneficial to a broad range of stakeholders, recognising that support needs span across those travelling with prams, seniors with mobility requirements, and people with permanent or temporary disabilities.

Travellers with accessibility requirements are estimated to make up 7% of the Australian adult population. When factoring that many people with accessible requirements travel with others such as carers, it is estimated that 14% of the adult population need accessible tourism experiences and services.⁶⁰

While the size of the accessible tourism market in the Northern Territory is unknown, studies from Victoria and Queensland estimate that up to 10% of domestic spend could be attributed to travellers with accessibility requirements.⁶¹ It is not unreasonable to assume the Northern Territory could also generate similar outcomes to Victorian and Queensland markets.

Detailed information that provides advice on accessibility relevant to specific disabilities is rated the highest priority by travellers with a disability. As there is no central service providing information relating to accessibility for travellers, planning travel is a time-consuming process which requires speaking to individual operators directly to determine if their product or service meets individual accessibility needs.⁶²

Currently no strategic approach to accessible tourism exists in the Northern Territory or East Arnhem Land, resulting in a gap in the tourism offering, and an opportunity for further development of the tourism industry.



Garrapurra - Blue Mud Bay
Image: DEAL

Actions - Visitor experience

#	Development theme	Action	Lead	Partners	Timeframe
33	• Infrastructure investment	In line with the Drive Tourism Strategy and Central Arnhem Road Investment Strategy, implement the recommendations of the Central Arnhem Road Visitor Experience Review.	• AARWG	• DIPL • Tourism NT • NLC • DEAL	Short term
34	• Infrastructure investment	Complete an audit of current homelands tourism infrastructure and determine priorities for new and upgraded facilities.	• DEAL • Tourism NT	• Operators	Short term
35	• Infrastructure investment	Support Yolŋu and Anindilyakwa businesses with funding applications for homelands infrastructure to support tourism development.	• DEAL • DITT • Tourism NT	• Tourism NT • Operators • NIAA	Short term
36	• Infrastructure investment	Support the delivery of Arts Trail infrastructure projects in East Arnhem Land to ensure timely and fit for purpose delivery.	• Buku-Larrngay Mulka Centre • Gapuwiyak Art Centre • Arts NT	• DCMC • DITT • DEAL	Short term
37	• Infrastructure investment	Support investigation into the feasibility of marine infrastructure (jetties) for the major communities of Milingimbi, Ramingining and Galiwin'ku to enable marine tourism activities.	• Local organisations • DEAL	• DIPL • DCMC • DITT • NIAA • Tourism NT	Short term, then ongoing
38	• Infrastructure investment	Leveraging other economic development processes underway in the region, develop a pipeline of tourism investment opportunities.	• DEAL • DCMC • DITT	• Tourism NT	Medium term
39	• Visitor servicing	Produce, distribute and regularly update information fact sheets to assist VIC staff with visitor enquiries specific to the Central Arnhem Road and East Arnhem Land. Coordinate information sessions and familiarisation visits for VIC staff and regional tourism operators.	• DEAL	• TTE • Katherine Town Council • Operators • TEA	Ongoing
40	• Visitor servicing	Implement signage changes at the TTE VIC and Katherine VIC to recognise East Arnhem Land and West Arnhem Land as distinct tourist regions.	• TTE • Katherine Town Council	• DEAL	Short term
41	• Visitor servicing	Introduce information stands at key visitor touch points around the region.	• TEA	• DEAL • NCL	Short term
42	• Visitor servicing • Workforce development	Implement visitor servicing training for tourism operators across the Top End.	• TTE	• Tourism NT	Medium term
43	• Visitor servicing	Develop a regional visitor services strategy.	• DEAL	• TEA	Medium term
44	• Visitor servicing	Investigate viability of full accreditation of Nhulunbuy VIC, and other options to increase visitor services.	• NCL	• TEA	Long term
45	• Accessible tourism	Tourism NT to work with industry to implement self-assessment and rectify accessibility barriers in their operations. The PIT and NT Government agencies to consider accessibility, when providing comment, or allocating funding to investment initiatives, grant rounds or infrastructure implementation.	• Tourism NT • PIT • NT Government agencies	• Operators	Short term
46	• Accessible tourism	Facilitate workshops to improve operator understanding of accessible tourism.	• DEAL	• TEA	Medium term

Business environment

Workforce development, training and pathways

Tourism workforce training and career pathways

Appropriate training and genuine career pathways to sustainable employment are crucial to the growth of the East Arnhem Land tourism industry, in particular the growth of Yolŋu and Anindilyakwa cultural experiences.

There is currently no dedicated tourism training program based in the region. Training based outside the region is inaccessible to many Yolŋu and Anindilyakwa as it is not culturally relevant and requires extended time away from family. Training is the first step in ensuring Yolŋu and Anindilyakwa have the skills and confidence they require to actively participate in the tourism industry. Training needs to incorporate technical training, mentoring and industry placement to ensure pathways to employment are created.

Two-way cultural workplaces

Intercultural competency training and experience is also required for Yolŋu, Anindilyakwa and non-Aboriginal businesses to successfully engage with Yolŋu and Anindilyakwa or employ Yolŋu and Anindilyakwa workers. These workers have unique cultural and social circumstances that often require cognisance, flexibility and support from employers. Existing tourism businesses have expressed a strong desire to hire more Yolŋu and Anindilyakwa staff, however, more work is required to create conditions for successful long-term employment.

Incorporation of tourism training into existing activities

There is an opportunity to expand land management programs which operate across the East Arnhem region to incorporate tourism related activities. For example, many of the activities currently undertaken by rangers, art centres and Community Development Program activities would make great visitor experiences and create additional income for the expansion of these programs.

Recognition of cultural skills and knowledge

Yolŋu and Anindilyakwa have highly specialised artistic, medicinal and land management skills which are often not formally recognised. There are no formal qualifications available to identify and acknowledge many of these unique skills within the tourism context.

Yolŋu and Anindilyakwa are experts in the land and sea around them and are natural guides when welcoming visitors to their country. Formal recognition of these skills, as well as the ability to build on and harness these skills through fit for purpose tourism workforce training, would support Yolŋu and Anindilyakwa in developing authentic tourism experiences. It is also aligned with taking a strengths-based approach to building tourism capability in the region yet recognising and building on existing, exceptional knowledge and skills.

Business capacity/capability development

'Back-end' support

The biggest challenge facing small Yolŋu and Anindilyakwa businesses is the lack of support and mentoring available to help entrepreneurs with administration functions, such as finance, governance, business planning, human resources management and regulatory compliance. There are currently limited support services available for emerging businesses to outsource the administration components of their operations without a significant cost burden. Almost all existing successful Yolŋu tourism experiences in the region have support for these functions through personal relationships or are run or supported by other organisations for whom these activities are outside of their core or funded activities. Existing Anindilyakwa tourism businesses are often operating as part of larger businesses where back-end support is provided as part of broader operations.

There is a need for support services and facilities which allow Yolŋu and Anindilyakwa entrepreneurs to run the core of their businesses while being well supported with the administration that comes with running a business. It is important that these services, if established, allow for learning and mentoring that genuinely builds capability for the business to become self-sufficient.

Industry housing

One of the major constraints to business growth across East Arnhem Land is the limited availability of staff housing and serviced land in remote communities and homelands for new housing. Anecdotally, there is currently unmet demand for between 50 to 80 new employee houses in the East Arnhem region. This is a significant barrier to:

- business growth and expansion
- attraction and retention of staff
- creation of living conditions that support Yolŋu to engage in the workforce.

It is currently prohibitively expensive for most organisations to meet the costs of servicing land and building employee housing. The average cost of building a three-bedroom house in a remote East Arnhem Land community is \$550,000 and developers generally must cover the costs of essential services connections, which can amount to up to \$200,000 if no upgrades are required to the mains infrastructure. This is a disincentive to businesses and organisations that wish to expand their footprint in communities or create a more permanent presence. Additionally, there are currently limitations on housing availability within Nhulunbuy and Alyangula townships, but the current demand for housing must be balanced with expected population and housing demand decline once mining ceases in both locations.

Industry housing is a key identified priority of both the Regional Reconstruction Committee and Gove Peninsula Futures Reference Group, and work is underway to better understand the unmet housing need in the region and propose solutions to address this.

Increasing the availability of industry housing across major communities and, where feasible, homelands, in East Arnhem Land would allow existing businesses to expand while creating an enabling environment for new businesses to be established.

Land tenure

A critical part of East Arnhem Land's history is the bark petition sent by clan leaders to the Australian Government in response to mining operations commencing on the Gove Peninsula in the 1960s. The bark petition played a key role in the development and introduction of the *Aboriginal Land Rights (Northern Territory) Act 1976* (Land Rights Act). The entirety of East Arnhem Land has been granted as Aboriginal land in recognition of the ongoing cultural connection of Traditional Owners to their country.

The Land Rights Act provides for granting of leases, licences and other agreements of Aboriginal land, primarily through Section 19 of the Land Rights Act. The Section 19 agreement process gives Traditional Owners an opportunity to consider, develop terms and conditions and the right to consent to or reject proposals on their land and seas. Once agreed, a Section 19 agreement provides the holder with legal rights to occupy and use the relevant land for the agreed purpose. Some communities in East Arnhem Land (Gunyanjara and the three main communities in the Groote Archipelago) are covered by Section 19A township leases. Under these township leases, the granting of interests is managed in a slightly different

way but still facilitates the granting of leases or licences for business purposes. Land use agreements over Aboriginal land are required for all developments irrespective of whether the applicant is the recognised Traditional Owner of the land in which the development will be occurring.

The NLC currently advises that Section 19 agreements on Yolŋu land can take 18 months or longer to finalise. Delays of this length are a considerable barrier to new product development, especially for Traditional Owners who are interested in developing experiences on their own land.

Many funding opportunities require applicants to submit evidence of their Section 19 agreement. If the Section 19 application is not yet complete, the applicant and the region is often denied much needed funding to support tourism growth.

Processing times for Section 19 agreements and township subleases on Groote Eylandt are issued via the Anindilyakwa Land Council (ALC) and the Office of Township Leasing. They are reported to have considerably shorter processing times. Similarly, processing times for township subleases under the Gunyanjara township lease have a shorter processing time through Njarrariyal Aboriginal Corporation.

Actions - Business environment

#	Development theme	Action	Lead	Partners	Timeframe
47	• Workforce development	Implement Northern Territory Aboriginal Tourism Strategy 2020 – 2030 actions relevant to the East Arnhem region.	• Tourism NT	• PIT	Short term, then ongoing
48	• Workforce development	Organise a biennial study tour for Yolŋu and Anindilyakwa interested in entering the tourism industry. Provide opportunities for Yolŋu and Anindilyakwa to learn from successful Aboriginal tourism entrepreneurs from other parts of Australia.	• DCMC • DEAL	• NTATC • DITT • Operators	Short term
49	• Workforce development	Convene a workforce development working group (WDWG) to: • undertake a skills gap analysis that can be used to create training tailored to the needs of industry and the needs of Yolŋu and Anindilyakwa • deliver tailored training for Yolŋu and Anindilyakwa workers to gain the skills required for employment in the tourism industry • deliver a suite of targeted skills development, capacity building and training services to tourism operators • investigate incorporating tourism training (such as Certificate II in Tourism) into the high-school curriculum • collaborate to create pathways from training to employment.	• DCM&C • CDP Providers • Operators • RTOs • DITT • Tourism NT	• NTATC • DEAL • RRC • Department of Education • NIAA • TTE • Hospitality NT • ISACNT	Short to medium term
50	• Workforce development	Develop best practice Aboriginal employment standards for tourism businesses to follow based on case studies from across the region and the Top End. Support the creation of workplaces that are culturally competent; value and respect cultural differences; and work to create a shared two-way environment.	• CDP providers • ARDS • Operators • Tourism NT	• NTATC • ISACNT	Medium term
51	• Workforce development	Develop tourism-specific cultural competency training for tourism operators who employ or intend to employ Yolŋu and Anindilyakwa workers.	• ARDS • Tourism NT	• DCMC • NIAA • DITT	Medium term
52	• Workforce development	Based on the outcomes from the WDWG, work with operators to develop a pool of Yolŋu and Anindilyakwa drivers and tour guides that can support cultural tours throughout the region.	• WDWG • Operators	• CDP providers	Medium term
53	• Business capacity • Workforce development	Continue to invest in ReviewPro or similar data collection tools and work collaboratively with TTE and Hospitality NT to support the development of industry standards using data insights.	• Tourism NT	• TTE • Hospitality NT	Short term
54	• Business capacity and capability	Work with Northern Territory and Commonwealth government departments to support incorporation of industry staff accommodation needs when planning subdivisions in communities.	• RRC • DEAL	• DCMC • NIAA	Ongoing

#	Development theme	Action	Lead	Partners	Timeframe
55	• Business capacity	Provide 'back-end' business administration support services for emerging Yolŋu businesses.	• DEAL	• DITT • NIAA	Short term
56	• Business capacity	Re-establish a regional business development network to encourage collaboration and access to services, including sub-regionally based support opportunities.	• DEAL	• Many Rivers • NIAA • DITT • DCMC • Sub-regionally based providers	Short term
57	• Business capacity	In collaboration with Traditional Owners, local organisations and community members, develop economic action plans for each East Arnhem Land sub-region. These plans will focus on short term actions designed to progress the tourism aspirations of each major community.	• Local organisations • DCM&C	• Tourism NT • DEAL	Short term
58	• Business capacity • Workforce development	Investigate and, if viable, establish a regional 'tourism hub' which can support tourism businesses with centralised support and training services.	• DEAL	• TEA • DCMC	Long term
59	• Business capacity • Destination marketing • Visitor servicing	Continue advocating for funding for a tourism development officer to be based in the region full time to support the implementation of this DMP.	• TEA • DEAL		Ongoing
60	• Land tenure • Infrastructure investment	Work collaboratively with relevant parties to review and address barriers to the coordination of Aboriginal land access.	• NIAA • NLC • ALC	• Tourism NT • NTATC • DCMC	Short term
61	• Land tenure	Assist Traditional Owners and other Yolŋu and Anindilyakwa businesses with the development of business plans and other relevant documentation as required by the relevant land council to obtain a Section 19 lease or licence.	• DEAL • DITT	• ALC • NLC • NIAA	Short term
62	• Land tenure	Develop an investment guide to assist investors in navigating land access and development processes.	• DEAL	• NLC	Medium term



*Bungut (dance) with Lirrwi Tourism – Gove Peninsula
Image: Tourism NT*



Product development opportunities

East Arnhem Land has a diverse range of experiences available to tourists. Most experiences currently centre on the Gove Peninsula and Groote Eylandt. A growing number of homelands are interested in developing experiences for tourists.

The region's natural, cultural and historical assets allow for significant growth in the depth and breadth of available product.

The following product categories have been identified as growth opportunities for the region to progress.

The sub-regions that each of these opportunities apply to are highlighted in each section.



Yolju and Anindilyakwa culture



Accommodation



Caravan and camping



4WD/adventure drives



Recreational and guided fishing



Festivals and events



Food and drink



History



Safari hunting



Eco-tourism experiences



Space



Transport options



Hiking



Wellness



Wildlife experiences

Yolŋu and Anindilyakwa culture

Yolŋu and Anindilyakwa culture is integral to most product development opportunities. Fourteen percent of domestic tourists and 77% of international tourists participate in Aboriginal cultural activities during their trip to the Northern Territory.⁶³ Demand for Aboriginal tourism is increasing sharply, with the number of international tourists participating in some form of Aboriginal tourism increasing by over 40% between 2013 and 2019.⁶⁴ Aboriginal tourism experiences in East Arnhem Land are unique compared to the rest of the Northern Territory. Visitors have the opportunity to visit Yolŋu homelands to learn and engage with Yolŋu leaders on their land. Sixty five thousand years of Yolŋu and Anindilyakwa history and culture remains strong and alive in the region as one of the oldest continuing cultures on earth. In line with the guiding principles, these opportunities must be led by and delivered in partnership with Yolŋu and Anindilyakwa peoples. There are opportunities to leverage off other significant projects, including Local Decision Making (LDM), the East Arnhem Landowner Prospectus and The Voice to support co-design and effective identification of opportunity and engagement.

Art centres are established in each major community and have connections with residents of many of the surrounding homelands. Art centres are often the centre of cultural expression and cultural preservation in communities.

Incentive groups visit homelands as part of corporate programs designed to foster connections and learning between large companies and Yolŋu people. Groups of secondary school students also visit homelands around the Gove Peninsula to learn on country about Yolŋu culture.

The opportunity for Yolŋu and Anindilyakwa culture extends further than purely cultural tourism experiences. If developed correctly, the Yolŋu and Anindilyakwa culture can be woven into most of the tourism product that exists in the region.

Opportunities	Challenges
Development of hands-on, education workshops and guided tours for tourists, led by Yolŋu and Anindilyakwa. These could involve storytelling, shallow water fishing, spear or yidaki making, bush foods, bush dyeing, weaving demonstrations and art workshops.	International tourists are much more likely to participate in an Aboriginal tourism experience. Engaging the domestic market with product that appeals to this segment, which makes up the vast majority of arrivals to East Arnhem Land, will be necessary to grow this market.
Expansion of the art centre operations to include experiences such as cultural and historical experiences, with the support of art centre management.	Business development, training and workforce development will all be needed to ensure Yolŋu and Anindilyakwa entrepreneurs have the necessary skills to create a sustainable and successful business.
Development of accessible, half-day cultural tour options.	Yolŋu and Anindilyakwa landowners are required to go through the same Section 19 process as non-Aboriginal people. The requirements of this process can be burdensome without support.
Expansion of accommodation, infrastructure and experiences available to corporate groups and school groups on homelands.	Homeland residents find it difficult to start or run a business due to limited or no access to phone or internet services.
Development of self-drive tours and itineraries that link art centres together as a trail.	

Sub-regions suited to the development of Yolŋu and Anindilyakwa cultural experiences	
<ul style="list-style-type: none"> • Gove Peninsula • Blue Mud Bay • Gapuwiyak and surrounds • Ramingining and Arafura Swamp 	<ul style="list-style-type: none"> • Milingimbi and Crocodile Islands • Galiwin'ku and Wessel Islands • Groote Archipelago

Accommodation

Current hotel-style accommodation offerings, catering to the leisure market, are centred on the Gove Peninsula and Groote Eylandt. Donga-style (dismountable) accommodation is available in each community and some homelands. They are utilised by workers such as contractors, health workers and public sector employees. Hotel accommodation is often also utilised by these workers. Demand from leisure tourists and workers can create shortages during peak periods.

As demand increases from leisure tourists, new accommodation offerings will be required. In particular, high-end, eco-friendly accommodation has been identified by stakeholders as most needed in the region to meet the expectations of the leisure market.

Opportunities	Challenges
Development of a new accommodation offering on the Gove Peninsula to target the luxury market and current high-end tours that visit the region.	Ensuring new accommodation offerings have sufficient linkages into the local economy such as creation of locally based jobs.
Development of small glamping options that create little impact on the environment.	Ensuring homelands have capacity in existing essential services such as water and power to support the construction and operation of new lodgings.
Development of small-scale eco-friendly lodgings on or nearby to homelands to increase visitor comfort while on cultural immersion programs.	Ensuring appropriate arrangements are in place between operators and homelands service providers (where applicable) to contribute to the maintenance of road, air strips and utility infrastructure.
	Ensuring development of wet and shoulder season product to support year-round need for accommodation.
	Current lead time for land access permissions can discourage private investment on Aboriginal land.

Sub-regions suited to the development of accommodation

<ul style="list-style-type: none"> • Gove Peninsula • Blue Mud Bay 	<ul style="list-style-type: none"> • Galiwin'ku and Wessel Islands • Groote Archipelago
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Caravan and camping

The East Arnhem region currently has multiple campgrounds, most of which are heavily centred around the Gove Peninsula. According to Dhimurru, camp sites managed by the organisation currently operate at over 95% occupancy during the peak season. Based on current visitation levels, it is predicted there will be a shortage of available campsites over peak periods in the short term. If new campsites are not built or existing campsites expanded, the growth of the tourism industry will be limited.

Groote Eylandt has multiple recreational areas, however, they lack dedicated camping infrastructure. Ferry access for vehicles to the Archipelago is not currently available. Nhulunbuy has one waste dump point for caravans, however, caravans are prohibited from visiting most campsites due to potential impacts on camping infrastructure and limited road access and turning circles.

Opportunities	Challenges
Identification of new areas along the Central Arnhem Road and key arterial roads which Traditional Owners are interested in developing into new campgrounds.	As the condition of the Central Arnhem Road improves, more tourist traffic is expected along the route, driving visitor demand which the region may not be able to cater for in the short term.
Develop and improve camping infrastructure at existing Groote Eylandt recreational areas, which supports both free and independent travellers and the development of guided tours.	Current lead time for land access permissions at times do not align with Traditional Owner aspirations for business commencement.
Fee-for-service model can be developed for land management organisations to maintain and monitor sites on behalf of owners.	Campgrounds are usually located away from existing communities/homelands and therefore unlikely to be able to connect to existing utilities, increasing cost of establishment.

Sub-regions suited to the development of caravan and camping product

<ul style="list-style-type: none"> • Gove Peninsula • Blue Mud Bay • Gapuwiyak and surrounds 	<ul style="list-style-type: none"> • Ramingining and Arafura Swamp • Groote Archipelago
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4WD/adventure drives

All self-drive visitors require a capable vehicle to safely access the region. The more remote campgrounds around the Gove Peninsula require 4WD experience and appropriate recovery equipment to successfully and safely access the sites without issue. The Central Arnhem Road drive and the tracks to access campsites are signature East Arnhem Land experiences. As the Central Arnhem Road begins to be sealed with bitumen from 2021, the region must continue to develop new adventure drives to continue to cater to this market.

A small number of tag-along (guided) 4WD tours visit the region each year. The number of tag-along tours to the region is expected to increase as more drive options become available with the development of new campsites and homelands experiences.

Opportunities	Challenges
Development of new adventure drives concurrently with the construction of new campsites.	The sealing of the Central Arnhem Road has the potential to lessen the appeal of the region to the adventure drive market if other 4WD routes are not developed.
Development of new drive itineraries in collaboration with tag-along tour companies.	More road traffic increases the need for road maintenance. Organisations responsible for road maintenance already struggle to maintain roads to a sufficient standard due to funding constraints.
Roads with access restrictions could be opened to recreational traffic with partnerships between tag-along tour operators and Traditional Owners.	The development of tag-along tours will require homelands and/or the tour operator to gain Section 19 approval, which can delay entry to market.

Sub-regions suited to the development of 4WD/adventure drives	
<ul style="list-style-type: none"> • Gove Peninsula • Blue Mud Bay • Gapuwiyak and surrounds 	<ul style="list-style-type: none"> • Ramingining and Arafura Swamp • Groote Archipelago



Old Dhupuma Road - Gove Peninsula
Image: Tourism NT/Shanaa McNaught

Recreational and guided fishing

Recreational and guided fishing is one of the more developed tourism sectors in the region. The sector is broken down into multi-day guided fishing tour operators, guided day fishing charter operators and non-guided, recreational fishers. Multiple charter operators are based in the region, most of which operate out of the Gove Peninsula. There are recreational fishing sites with boat ramps across the Gove Peninsula, Groot

Eylandt and Blue Mud Bay, however, these sites primarily cater to local residents. The NLC, in partnership with CSIRO/DEEP, the Northern Territory Government and Traditional Owners from Blue Mud Bay, is currently investigating the development of the recreational fishing sector across the Arnhem Land Coast. This is likely to create more opportunities for the development of the recreational fishing sector.

Opportunities	Challenges
Development of an Arnhem Land fishing trail based on the outcomes of the NLC recreational fishing consultancy.	Operators offering dedicated fishing packages are at capacity. Limited room for growth without expanding existing operations or new entrants to the market.
Development of dedicated lodgings catering to the needs of recreational fishers, in particular high-end recreational fishers.	Dedicated fishing operations require high levels of upfront capital investment and may require land/sea access permissions depending on the operation.
Identification of new recreational fishing areas, at the direction of Traditional Owners and the NLC.	Limited road access to the region over the wet season restricts fishing experiences to those willing to fly into the region.
Development of new product and experiences that cater for the recreational fishing market, at the direction of Traditional Owners and the NLC.	Conditions along the Central Arnhem Road limits the number of visitors willing to tow their boat into the region.
	Commercial fishing for species such as barramundi can reduce the fish stock and reduce the appeal of fishing in the region.

Sub-regions suited to the development of recreational and guided fishing

<ul style="list-style-type: none"> • Gove Peninsula • Blue Mud Bay • Gapuwiyak and surrounds • Ramingining and Arafura Swamp 	<ul style="list-style-type: none"> • Milingimbi and Crocodile Islands • Galiwin'ku and Wessel Islands • Groote Archipelago
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Festivals and events

Events have wide ranging economic impacts across the visitor economy benefiting accommodation providers, restaurants and tour operators. Events can be a main driver for visitation, with one study finding 57% of first-time visitors to a region being primarily motivated to visit by an event. In addition, 75% of the survey respondents advised the event was the only reason driving visitation.⁶⁵

Current events in the region consist of Garma, small sporting competitions targeted primarily at locals and small community festivals primarily attended by community residents.

The development of new festivals and events in the region can encourage visitation from markets that may not otherwise consider travelling to the region and can encourage visitation to the region outside the peak season.

Opportunities	Challenges
Development of new events celebrating Yolŋu and Anindilyakwa culture through the sharing of traditional and contemporary music, dance, art and culture.	Limited accommodation across the region means that the full economic benefits of large-scale events are not realised.
Expansion of current fishing competitions to target anglers from outside the region.	Limited flight capacity into the region means that flights are expensive and the number of event-based visitors arriving by air is restricted. To increase capacity, charter flights will be required.
Expansion of current sporting events such as the Gove Boat Club's Regional Regatta to attract visitors that may not otherwise consider visiting the region.	The number of event-based visitors that can participate in pre and post event touring is limited due to the limited number of tour operators, limiting the economic impact of the event.
Expansion of current community festivals to welcome tourists, at the direction of Traditional Owners and event organisers.	Large-scale events are expensive to organise due to the region's remote location.
Development of new sporting events.	

Sub-regions suited to the development of festivals and events

<ul style="list-style-type: none"> • Gove Peninsula • Blue Mud Bay • Gapuwiyak and surrounds • Ramingining and Arafura Swamp 	<ul style="list-style-type: none"> • Milingimbi and Crocodile Islands • Galiwin'ku and Wessel Islands • Groote Archipelago
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Food and drink

Food and drink menus are often reflective of the local area and provide an opportunity for tourists to experience a destination through local flavours and seasonal produce. The region's food and drink offering is currently centred on Nhulunbuy and Alyangula. Current menu offerings lack fresh, locally sourced

seafood and native produce, such as bush foods. This is due to a lack of local bush food production and an absence of local supply chains allowing restaurants in these towns to access locally caught seafood.



Opportunities	Challenges
Incorporation of locally grown native produce onto menus of existing restaurants.	Bush foods are an identified emerging industry for the region and are not currently harvested on a commercial scale.
Development of small tours focused on bush foods, which can be packaged into larger tour offerings.	Facilities to process fish and bush foods are not available in the region.
Development of new experiences that allow recreational fishers to 'enjoy their catch' either as part of the fishing charter or in partnership with a local restaurant.	Cultural intellectual property in bush foods and other produce needs to be protected and balanced with greater incorporation into food and drink offerings.

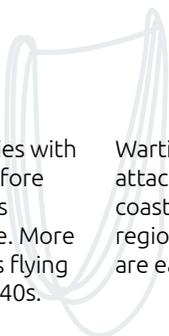
Sub-regions suited to the development of food and drink product

- | | |
|--|--|
| <ul style="list-style-type: none"> • Gove Peninsula | <ul style="list-style-type: none"> • Groote Archipelago |
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History

East Arnhem Land has a long and diverse history. Trade ties with the Makassar people of Indonesia date back centuries before European colonisation of Australia and these connections remain an integral part of Yolŋu and Anindilyakwa culture. More recently, Groote Eylandt was an essential stop for Qantas flying boats travelling between Australia and England in the 1940s.

Wartime history is also abundant in the region. The Japanese attack on Australia during World War II along the Arnhem Land coast is well documented but not well known outside the region. Relics from the war, such as plane wrecks and bunkers, are easily accessible from major communities.



Opportunities	Challenges
Incorporation of the region's history into new product. This could include the development of short educational tours targeted at leisure tourists and students visiting the region for educational purposes.	Many of the region's history assets are located on islands or areas with poor road access. These areas do not currently have established leisure visitor markets.
Development of longer experiences, such as hiking routes similar to the Kokoda Track, which could be created to follow the routes used by the Northern Territory Special Reconnaissance Unit during WWII.	Developing tours focused on the region's history will require respectful and sensitive negotiation with landowners, descendants of the Northern Territory Special Reconnaissance Unit and Norforce.
The region's historical connection with Asia may create an opportunity to market the region to international audiences, once product is developed.	Despite having an interesting and rich history, East Arnhem Land is not known for its historical events. Creating a compelling narrative about the region's past that appeals to visitor markets will be required to build demand.

Sub-regions suited to the development of history product

- | | |
|--|---|
| <ul style="list-style-type: none"> • Gove Peninsula • Blue Mud Bay • Gapuwiyak and surrounds • Ramingining and Arafura Swamp | <ul style="list-style-type: none"> • Milingimbi and Crocodile Islands • Galiwin'ku and Wessel Islands • Groote Archipelago |
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Safari hunting

Legal hunting safaris targeting buffalo, banteng (an introduced species of South East Asian cattle) and boars currently operate in parts of Central and West Arnhem Land. This sector is high yield, attracting international clients. Tours can be priced at over \$4,000 per day depending on the experience. Game hunting species (buffalo and boar) are abundant in East Arnhem Land and cause significant harm to the environment. No legal,

recreational hunting currently occurs in East Arnhem Land. Hunting tour companies can establish tours in the region by submitting a Section 19 expression of interest to the NLC. Legalised hunting would likely have positive ecological impacts by reducing numbers of invasive species, which are destructive to the environment.

Opportunities	Challenges
The designation of sections of land for organised hunting safaris, with the approval of the NLC, land management companies and Traditional Owners.	Developing and implementing an approval and safety process that would meet the needs of landowners, industry and recreational hunters, while protecting the environment.
Development of hunting tours by new or existing hunting tourism operators.	Development of a hunting sector would require careful consideration so as not to create mix messaging that detracts from other product opportunities, such as wildlife and wellness experiences.
Opportunity for the development of a high-yielding tourism experience that has positive ecological impacts.	Due to the impacts of illegal hunting, many Traditional Owners do not view recreational hunting as a desirable practice.

Sub-regions suited to the development of safari hunting	
<ul style="list-style-type: none"> • Gove Peninsula • Blue Mud Bay 	<ul style="list-style-type: none"> • Gapuwiyak and surrounds

Eco-tourism experiences

Nature-based tourism is defined as 'leisure travel undertaken largely or solely for the purpose of enjoying natural attractions and engaging in a variety of nature-based activities'.⁶⁶ Eco and nature-based tourism is becoming more popular and is an attractive investment for regions focused on environmental preservation. Nature-based tourism was identified as a top reason to visit regional destinations in Australia by both domestic and international visitors.⁶⁷

East Arnhem Land is perfectly suited to eco-tourism as most of the region comprises of a series of Indigenous Protected Areas, which are part of the National Reserve System. All product development opportunities must ensure they minimise impacts to the surrounding ecology and natural beauty of the landscape.

Opportunities	Challenges
Development of new experiences, such as beach clean ups and wildlife surveys, for eco-conscious travellers in collaboration with land management organisations.	Organisations well-placed to deliver eco-tourism experiences, such as land management groups, are often already oversubscribed with their core activities.
Incorporation of eco-tourism elements into new and existing product, such as accommodation and campsite offerings and wildlife tours.	Promotion of experiences such as beach clean ups need to be carefully managed so as not to damage East Arnhem Land's brand as a pristine landscape among other markets.

Sub-regions suited to the development of eco-tourism experiences	
<ul style="list-style-type: none"> • Gove Peninsula • Blue Mud Bay • Gapuwiyak and surrounds • Ramingining and Arafura Swamp 	<ul style="list-style-type: none"> • Milingimbi and Crocodile Islands • Galiwin'ku and Wessel Islands • Groote Archipelago

Space

Once ELA begins rocket launches at the Arnhem Space Centre, rocket viewing is expected to be a key driver of visitation to the region and a unique selling point for the Gove Peninsula, compared to other areas of the Northern Territory and Australia. Tourists who would usually need to travel to countries such as

the United States, Kazakhstan or India to view rocket launches will be able to have a similar experience on the Gove Peninsula. Rocket launches are scheduled to commence in 2022.

Opportunities	Challenges
Development of tours that link contemporary space and science with Yolŋu knowledge of astrology. These tours would target recreational tourists, with the option to adapt the tours to key target markets, such as the education and business events market.	Development of a safe and secure dedicated area for tourists to watch rocket launches is required.
Creation of tours that incorporate visiting the Arnhem Space Centre and the viewing of rocket launches, in collaboration with ELA.	Accommodation on the Gove Peninsula is in short supply. During launch times, space industry personnel will require accommodation, limiting capacity for tourists, thus restricting the economic impact of each rocket launch.
Limited light pollution, particularly on homelands, allows for individual homelands and/or the region as a whole to pursue International Dark-Sky certification through the International Dark-Sky Association.	

Sub-regions suited to the development of space

- Gove Peninsula

Transport options

The region is primarily accessed by leisure visitors by commercial flight or by car. One-way car hire is not offered by rental car companies for visitors who may wish to fly to Nhulunbuy and drive the Central Arnhem Road to Darwin or vice versa. Hire car services available in Nhulunbuy are often restricted to a certain radius from Nhulunbuy, thus limiting the communities and homelands that can be visited via hire car.

There are also no affordable services available that allow for car transport to Milingimbi, Elcho Island and Groote Eylandt from the mainland, thus making these regions inaccessible to self-drive tourists.

Opportunities	Challenges
Establishment of car hire options which are available for one-way hire between Darwin and/or Katherine and Nhulunbuy.	The condition of the Central Arnhem Road increases wear and tear on hire vehicles, thus increasing maintenance costs for operators, and subsequently car hire costs for tourists.
Development of services that connect communities, encouraging dispersal of the self-drive market to areas outside the Gove Peninsula.	Connecting the region's major communities would require a large upfront investment to establish a ferry service to connect mainland communities to island communities.
Re-establishment of one-way adventure cruises across the Arnhem Land coast, allowing for tourists to drive into Nhulunbuy and cruise back to Darwin with their vehicle.	

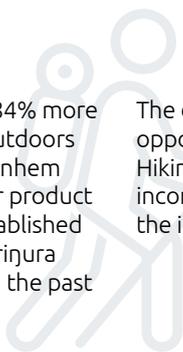
Sub-regions suited to the development of transport options

- | | |
|--|---|
| <ul style="list-style-type: none"> • Gove Peninsula • Blue Mud Bay • Gapuwiyak and surrounds • Ramingining and Arafura Swamp | <ul style="list-style-type: none"> • Milingimbi and Crocodile Islands • Galiwin'ku and Wessel Islands • Groote Archipelago |
|--|---|

Hiking

The hiking market is low impact, high yield. Hikers are 84% more likely than the average Australian to have visited the outdoors during their last holiday.⁶⁸ Considering much of East Arnhem Land is pristine wilderness, this is a strategic market for product development. East Arnhem Land currently has one established day hike, which runs for 7.2km from Daliwuy Bay to Bariṅura (Little Bondi Beach). Proposals have been developed in the past for the development of new hiking routes.

The development of hiking routes would create business opportunities and employment for Yolṅu and Anindilyakwa. Hiking can provide linkages to other tourism product by incorporating homelands immersion or history experiences into the itinerary.



Opportunities	Challenges
Development of new, multi-day, hiking routes, in collaboration with specialised hiking tour companies, based on existing proposals across the East Arnhem region.	Developing multi-day hiking routes would require significant collaboration between industry, landowners and the relevant land council.
Development of day or overnight hikes close to homelands that can be incorporated into existing homelands immersion tours.	Developing multi-day hiking routes would require significant upfront investment to develop.

Sub-regions suited to the development of hiking	
<ul style="list-style-type: none"> • Gove Peninsula • Blue Mud Bay • Gapuwiyak and surrounds 	<ul style="list-style-type: none"> • Ramingining and Arafura Swamp • Galiwin'ku and Wessel Islands • Groote Archipelago

Wellness

Wellness tourism is defined by the Global Wellness Institute as 'travel associated with the pursuit of maintaining or enhancing one's personal wellbeing'. The sector is estimated to be growing at twice the pace as the overall tourism industry.⁶⁹ The natural beauty, pristine environment and remoteness of the region

are all advantages for the development of health and wellness retreats. Homelands immersion tours currently incorporate wellness into their itineraries by featuring bush medicine and ceremonial healing demonstrations.



Opportunities	Challenges
Development of new product with a primary focus on wellness.	Larger scale wellness retreats require significant upfront capital investments.
Expand the region's current product offering to include a larger focus on wellness.	Transport and logistics for larger groups can be challenging given the region's remoteness.
Creation of business and employment opportunities for Yolṅu and Anindilyakwa interested in sharing their knowledge of bush medicine and ceremonial healing.	Current timeframes to gain relevant land access approvals may impact investment decisions.
	Market demand for traditional healing and bush medicines is unknown.
	Cultural intellectual property protection will need to be considered and well-managed if further traditional products and practices are incorporated into tourism offerings.

Sub-regions suited to the development of wellness tourism	
<ul style="list-style-type: none"> • Gove Peninsula • Galiwin'ku and Wessel Islands 	<ul style="list-style-type: none"> • Groote Archipelago

Wildlife experiences

East Arnhem Land is already well known for its natural environment, varied ecosystems and as home to a significant number of species including hundreds of endemic birds, whales, crocodiles, dugongs, and turtles. Bird watchers, commonly referred to as twitchers, are known to travel hundreds of kilometres to see a rare species.⁷⁰ The Gayraru Wetlands in

Nhulunbuy has the region's only dedicated bird watching hut and is not well marketed to bird watchers. Murwangi Safari Camp on the Arafura Swamp currently hosts Arnhem Land Bird Week, a packaged experience targeted at the twitcher market.

Opportunities	Challenges
Development of a regional 'bird week', modelled on the Kakadu Bird Week, which includes cultural events and specialist lectures targeted at the twitcher market.	More research is required to determine where rare bird species are located, and which bird species are of interest to bird watchers.
Development of dedicated wildlife tours, such as whale watching and crocodile spotting.	Limited understanding of the East Arnhem Land marine environment.
Development of tours, in collaboration with land management organisations, that allow tourists the chance to see or interact with wildlife, such as turtle conservation activities and assist with meeting land management obligations.	Limited resources for land management organisations mean they are hesitant to invest in tourism activities without certainty that tourism activities will be self-sufficient.
Development of a self-drive birding route that takes twitchers through habitats of rare, endemic bird species.	

Sub-regions suited to the development of wildlife experiences

- | | |
|--|---|
| <ul style="list-style-type: none"> • Gove Peninsula • Blue Mud Bay • Gapuwiyak and surrounds • Ramingining and Arafura Swamp | <ul style="list-style-type: none"> • Milingimbi and Crocodile Islands • Galiwin'ku and Wessel Islands • Groote Archipelago |
|--|---|



Garrapurra - Blue Mud Bay
Image: DEAL

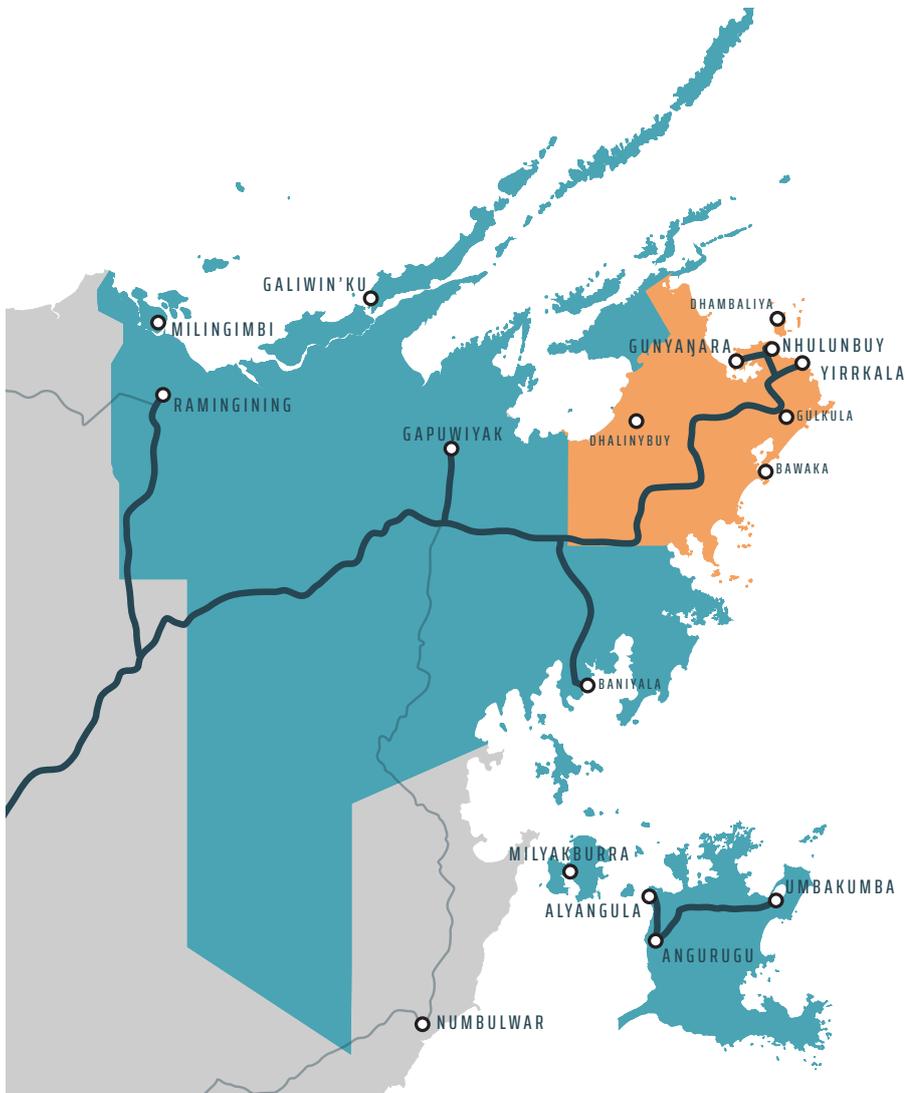
Sub-regional development projects

Consultations with stakeholders identified a strong interest to develop tourism product across all sub-regions of East Arnhem Land.

This section outlines each sub-region, its accommodation and camping capacity, current attractions, along with tourism-related projects identified by stakeholders.



*Banubanu Beach Retreat, Bremer Island - Gove Peninsula
Image: DEAL*



Gove Peninsula

The Gove Peninsula region contains the township of Nhulunbuy, major communities of Yirrkala and Gunyanara and 14 homelands. The region has an estimated population of 4,719.⁷¹

The Gove Peninsula, despite being only a fraction of the landmass of East Arnhem Land, is the centre of most of the region's tourism industry, hosting most of the region's accommodation and accessible attractions. Nhulunbuy, the Northern Territory's fourth largest town, acts as the regional centre of East Arnhem Land and hosts an increasingly diverse number of growing industries, including tourism.

The Gove Peninsula is located at the end of the Central Arnhem Road, 724 kilometres from Katherine. Gove Airport acts as the primary entrance point for visitors arriving to the region by air. Surrounding homelands are accessible from roads branching from the Central Arnhem Road.

Gove Peninsula - current tourism assets

Accommodation

	Total rooms	Maximum capacity
Nhulunbuy		
Walkabout Lodge	40	98
Gove Peninsula Motel	19	38
Banubanu Beach Retreat	6	12
Dhimurru Short Stay	3	6
East Arnhem Real Estate Holiday Rentals	3	18
Yirrkala		
Yirrkala Guest House by Buku-Larrngay Mulka	8	18

Camping

	Total sites	Maximum capacity
Nhulunbuy		
Walkabout Campgrounds	12	48
Gunyanara		
Manyimi Campgrounds	22	132
Dhalinybuy		
Cato River campgrounds	5	30
Gove Peninsula		
Dhimurru Recreational Areas	44	500

Attractions

Yirrkala	
Art centre	Buku-Larrnggay Mulka Centre is a world-renowned art centre. It consists of two divisions: the Yirrkala Art Centre which represents Yolŋu artists exhibiting and selling contemporary art, and The Mulka Project which acts as a digital production studio and archiving centre.
Bremer Island (Dhambaliya)	
Eco-tourism experiences	Banubanu Beach Retreat offers day and multi day tours to Bremer Island. Guests can relax, swim and walk around the island.
Nhulunbuy	
Wildlife experiences	Gayŋaru Wetlands, in the centre of Nhulunbuy, has a small educational trail where visitors can learn about fauna and flora native to the lagoon. A bird shelter is available for keen bird watchers.
Festival and events	The Gove Country Golf Club, Nhulunbuy Regional Sports Fishing Club and Nhulunbuy Rotaty Club all host events each year, attracting small numbers of visitors from outside the region.
Bawaka	
Yolŋu homelands	Traditional Owners of Bawaka homeland welcome guests to learn about Yolŋu culture via tours primarily organised through Lirwi Tourism. Bawaka is also well known as the location of the iconic Lonely Beach.
Gulkula	
Festival and events	Garma is the region's most well-known event, attracting high profile personalities to the region. This event is a key driver of visitation to the region.
Gove Peninsula	
4WD/adventure drives	The recreational areas operated by Dhimurru require a 4WD vehicle to access and some can offer visitors challenging and adventurous driving.
Recreational and guided fishing	Multiple fishing charter operators run tours targeting game species, such as barramundi. Boat ramps are located in strategic areas around the Gove Peninsula for keen anglers.
Hiking	A hiking trail from Daliwuy Bay to Bariŋura (Little Bondi Beach) gives hikers the opportunity to walk through various terrains and offers stunning views of the ocean.

Gove Peninsula - product development opportunities

	#	Product opportunities	Product status	Level of stakeholder support	Current status	Estimated scale of investment	Possible action
Gove Peninsula	1	Develop existing and new recreational areas across the Gove Peninsula	New	Broad	Identified opportunity	Low	Grant/funding application
	2	Construction of four-star visitor accommodation	New	Concentrated	Identified opportunity	High	Business case
Nhulunbuy	3	Development of a music festival focused on local artists	New	Broad	Identified opportunity	Low - Medium	Feasibility study
	4	Establishment of regular walking tours of Gayŋaru Wetlands	Existing	Concentrated	Identified opportunity	Low	Grant/funding application
	5	Establishment of Arnhem Land coastal ferry service from Nhulunbuy – Galiwin'ku – Milingimbi - Maningrida	New	Extensive	Identified opportunity	High	Business case
	6	Establishment of guided tours of the Arnhemland Historical Society control tower and museum	New	Concentrated	Identified opportunity	Low	Grant/funding application
	7	Development of facilities to allow for ocean swimming with minimal risk of crocodiles or stingers.	New	Broad	Identified opportunity	High	Market assessment
Yirrkala	8	Development of a multi-day hiking route from Yirrkala to Garthalala	New	Extensive	Identified opportunity	High	Feasibility study
	9	Establishment of guided tours of Buku-Larrnggay Mulka Centre	Existing	Concentrated	Identified opportunity	Low	Grant/funding application
Gunyaŋara	10	Construction of a new recreational port precinct for the Gove Peninsula.	New	Broad	Designs in progress	High	In progress
	11	Constructions of cabins overlooking Arafura Sea	New	Broad	Identified opportunity	Medium - High	Feasibility study
Daliwuy Bay	12	Upgrades to the Daliwuy Bay campgrounds away from the sea and construction of a boat wash facility	Existing	Concentrated	Identified opportunity	Medium - High	Grant/funding application
	13	Development of cultural experiences (weaving, spear making, wood carving, bushfoods tour)	New	Concentrated	Identified opportunity	Low	Grant/funding application

	#	Product opportunities	Product status	Level of stakeholder support	Current status	Estimated scale of investment	Possible action
Dhalinybuy	14	Upgrades to existing Cato River campground	Existing	Concentrated	Identified opportunity	Medium - High	Grant/funding application
	15	Construction of an art centre/cultural tourism space	New	Concentrated	Identified opportunity	Medium - High	Grant/funding application
Bawaka	16	Development of new visitor accommodation	Existing	Concentrated	Designs in progress	Medium - High	Grant/funding application
	17	Integration of charter fishing operations into existing cultural tourism experience	New	Concentrated	Proposed	Low - Medium	Feasibility study/market assessment
Gulkula	18	Construction of rocket viewing facilities	New	Broad	Proposed	Low - Medium	Market assessment
	19	Establishment of tours of the Arnhem Space Centre facilities	New	Broad	Identified opportunity	Low	Market assessment

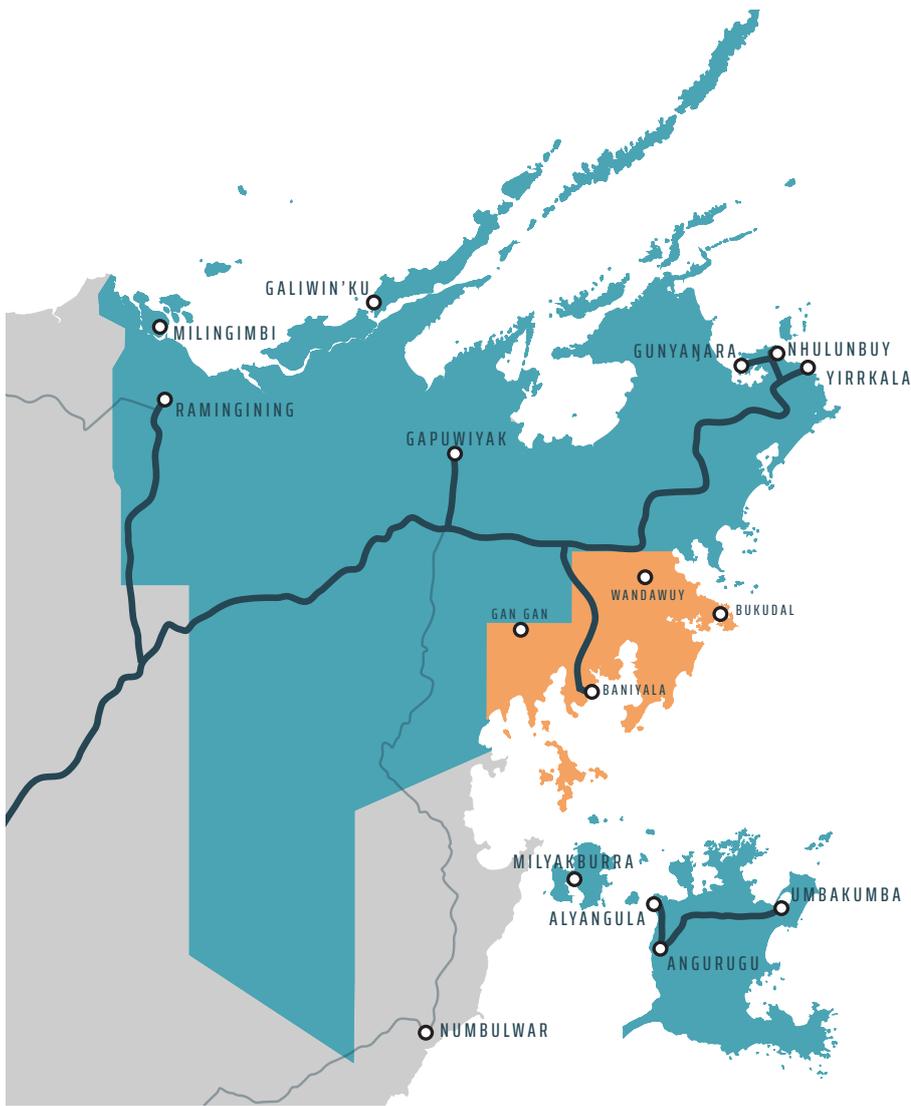
Product opportunities
Nature-based offerings
Aboriginal cultural offerings
Drive journey offerings
History and heritage offerings
Quality facilities

Level of stakeholder support	
Concentrated	Local community, individual or single government agency
Broad	Community + others, or multiple agencies
Extensive	Community, government, multiple agencies and/or industry

Estimated scale of investment	
High	+\$1 million
Medium	\$0.1 - \$1 million
Low	\$0 - \$100,000



Traditional painting at Dhalinybuy homeland - Gove Peninsula
Image: DEAL



Blue Mud Bay

Blue Mud Bay is a large, ecologically diverse bay located on the south east coast of East Arnhem Land. The region is synonymous to the landmark Blue Mud Bay decision, which recognised traditional ownership of intertidal waters.

The Blue Mud Bay region consists of the larger homelands of Bäniyala and Gan Gan and a further eight smaller homelands. The region has an estimated population of 299.⁷²

Road access to homelands located within the Blue Mud Bay region is via the multiple arterial roads originating from the Central Arnhem Road. Each homeland is approximately two to three hours' drive from Nhulunbuy. Homelands are also regularly accessed by charter flights from Gove Airport.

Blue Mud Bay - current tourism assets

Camping

	Total sites	Maximum capacity
Bäniyala		
Dholuwuy Campgrounds	6	36
Stingray Campgrounds	5	30

Attractions

Bukudal	
Yolŋu homelands	Traditional owners of Bukudal welcome visitors to their homeland via tours organised through Lirwi Tourism.
Bäniyala	
Recreational fishing	Car access to the beach at Dholuwuy Campgrounds allows for boats to be launched into Blue Mud Bay.

Blue Mud Bay - product development opportunities

	#	Product opportunities	Product status	Level of stakeholder support	Current status	Estimated scale of investment	Possible action
Blue Mud Bay	20	Construction of a high-end fishing lodge	New	Concentrated	Study in progress	High	Business case
	21	Development of an art centre/cultural tourism space	New	Concentrated	Designs in progress	High	Grant/funding application
Baniyala	22	Develop plan for Stingray Campsite	New	Concentrated	Identified opportunity	Low	Business case
	23	Installation of interpretive signage at campgrounds	New	Concentrated	Planned	Low	Grant/funding application
	24	Upgrades to existing beach boat ramp to a concrete boat ramp and undercover boat storage facilities	New	Concentrated	Identified opportunity	Medium - High	Grant/funding application
	25	Establishment of cultural tours of crocodile breeding areas and sand sculptures	New	Concentrated	Identified opportunity	Low	Market analysis
	26	Development of onshore cultural experiences designed for the expedition cruise market	New	Concentrated	Identified opportunity	Low - Medium	Business case
Can Can	27	Establishment of a multi-day, cultural immersion experience at Garraparra	New	Broad	Identified opportunity	Medium - High	Grant/funding application

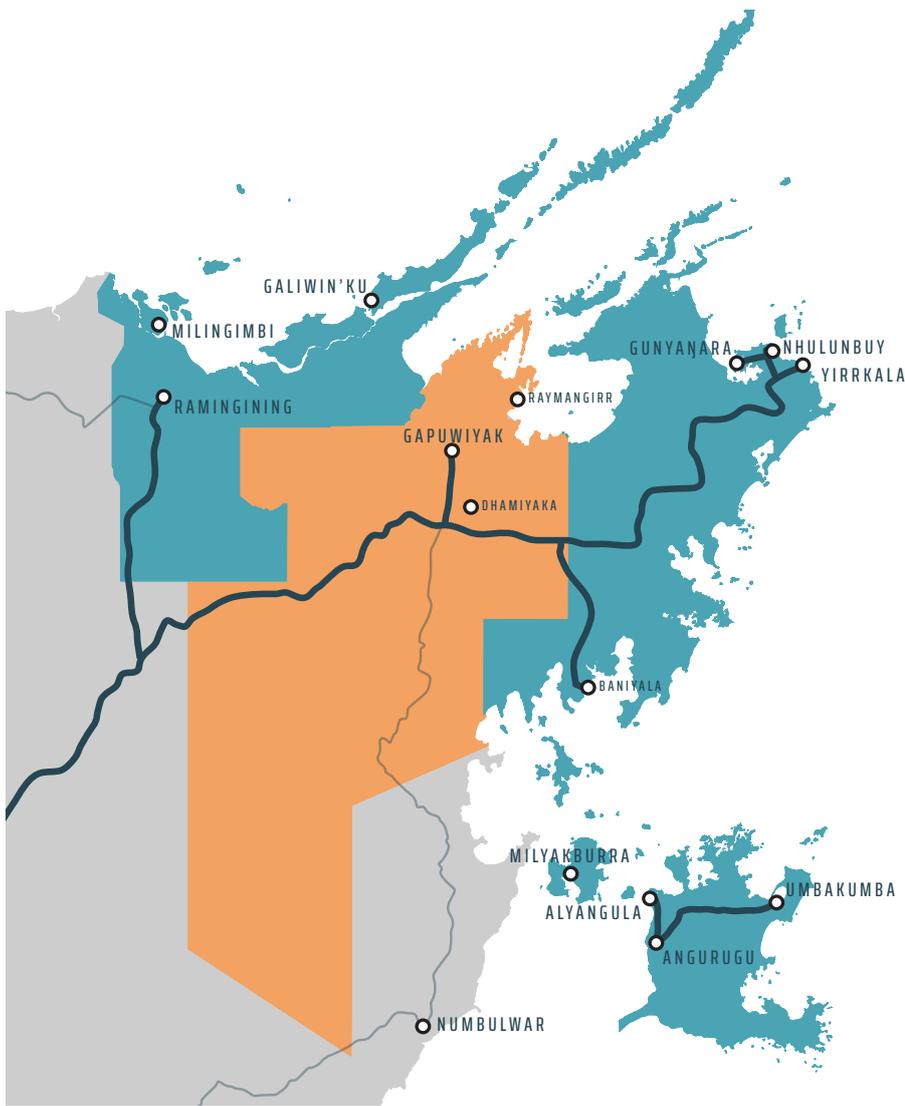
Product opportunities
Nature-based offerings
Aboriginal cultural offerings
Drive journey offerings
History and heritage offerings
Quality facilities

Level of stakeholder support	
Concentrated	Local community, individual or single government agency
Broad	Community + others, or multiple agencies
Extensive	Community, government, multiple agencies and/or industry

Estimated scale of investment	
High	+\$1 million
Medium	\$0.1 - \$1 million
Low	\$0 - \$100,000



Dholuwuy Campgrounds - Blue Mud Bay
Image: DEAL



Gapuwiyak and surrounds

Gapuwiyak is located adjacent to the shores of the picturesque Lake Evella. The community, along with 12 homelands, make up the Gapuwiyak and surrounds region. The region has an estimated population of 1,209.⁷³

Road access to Gapuwiyak is via a turn-off from the Central Arnhem Road about 220 kilometres or three hours from Nhulunbuy. The community also receives regular scheduled flights from Gove and Darwin.

Gapuwiyak and surrounds - current tourism assets

Accommodation

	Total rooms	Maximum capacity
Gapuwiyak		
Gurrambalk Accommodation	5	7
Gapuwiyak Arts and Culture accommodation	2	4

Attractions

Gapuwiyak	
Arts centre	Gapuwiyak Arts and Culture sells locally produced works and houses its own collection. The centre supports over 100 artists from Gapuwiyak and surrounding homelands.

Gapuwiyak and surrounds - product development opportunities

	#	Product opportunities	Product status	Level of stakeholder support	Current status	Estimated scale of investment	Possible action
Gapuwiyak	28	Development of a new art centre on the shores of Lake Evella	Existing	Broad	Planned	High	In progress
	29	Activation of the lake with board walk, café, interpretive signage, shaded area integrated into the new art centre	New	Broad	Designs in progress	High	In progress
	30	Establishment of cultural experiences (bush medicine, spear making, weaving) for tour operators to incorporate into their itineraries	New	Concentrated	Identified opportunity	Low	Grant/funding application
Raymangirr	31	Development of onshore cultural experiences designed for the expedition cruise market	New	Concentrated	Identified opportunity	Medium	Business case
	32	Creation of a new multi-day, hiking route from Ramingining to Raymangirr connected to history related to WWII and the Northern Territory Special Reconnaissance Unit	New	Extensive	Identified opportunity	High	Business case
Dhamiyaka	33	Construction of campgrounds	New	Concentrated	Funded	Medium - High	Implementation

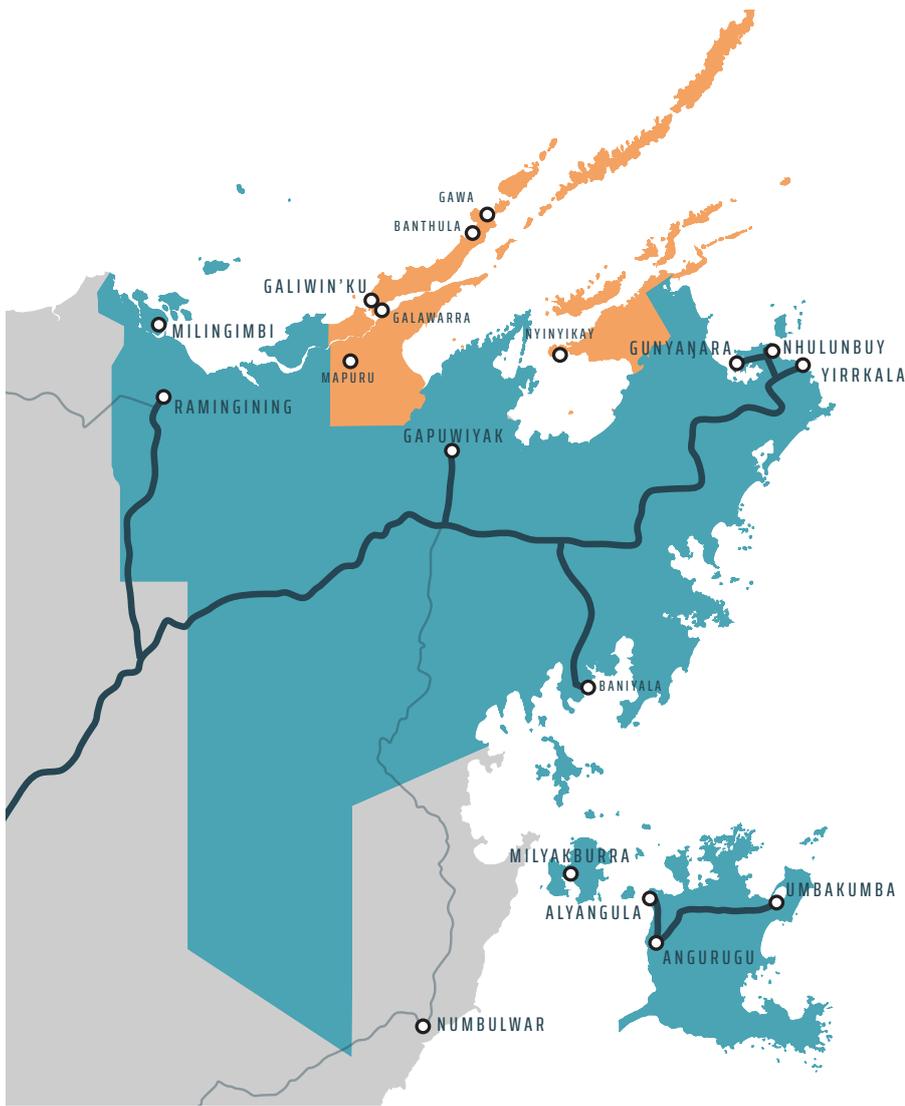
Product opportunities
Nature-based offerings
Aboriginal cultural offerings
Drive journey offerings
History and heritage offerings
Quality facilities

Level of stakeholder support	
Concentrated	Local community, individual or single government agency
Broad	Community + others, or multiple agencies
Extensive	Community, government, multiple agencies and/or industry

Estimated scale of investment	
High	+\$1 million
Medium	\$0.1 - \$1 million
Low	\$0 - \$100,000



Lake Evella - Gapuwiyak and surrounds
Image: DEAL



Galiwin'ku and Wessel Islands

The Galiwin'ku and Wessel Islands region contains the community of Galiwin'ku and 30 homelands. The region has an estimated population of 2,747.⁷⁴

Galiwin'ku is located on the southern end of Elcho Island, 138km west of Nhulunbuy. Elcho Island is at the south end of the Wessel Islands group and is bounded on the western side by the Arafura Sea.

Access to Galiwin'ku is by air. Regular scheduled flights are available from Gove and Darwin. Major homelands on the mainland and on Elcho Island are accessible by road or charter flight and outlying homelands are accessible by boat or charter flight.

Galiwin'ku and Wessel Islands - current tourism assets

Accommodation

	Total rooms	Maximum capacity
Galiwin'ku		
Marthakal Motel	37	41

Attractions

Elcho Island	
Arts centre	Elcho Island Arts is a Yolŋu-owned art centre located in Galiwin'ku. Their artworks (weavings, fibre art, carvings and ceremonial poles) are widely exhibited and feature in national collections within Australia and in major collections worldwide.
Yolŋu homelands	Traditional Owners of Banthula, Gawa and Galawarra welcome expedition cruise passengers to their homelands and offer cultural experiences such as weaving, dancing and spear throwing.
Nyinyikay	
Yolŋu homelands	Residents of Nyinyikay welcome visitors to their homeland via tours organised through Lirwi Tourism and Culture College.

Galiwin'ku and Wessel Islands - product development opportunities

	#	Product opportunities	Product status	Level of stakeholder support	Current status	Estimated scale of investment	Possible action
Galiwin'ku	34	Formalisation of onshore experiences for cruise ships	Existing	Broad	Identified opportunity	Low	Strategic planning
	35	Establishment of a ferry service from Galiwin'ku to surrounding islands	New	Extensive	Identified opportunity	High	Feasibility study
	36	Development of a day tour originating in Galiwin'ku and visiting participating homelands across the island	New	Broad	Identified opportunity	Low – Medium	Feasibility study
Nyinyikay	37	Development of a bush walk experience	Existing	Concentrated	Identified opportunity	Medium – High	Grant/funding application
	38	Development of recreational fishing	Existing	Concentrated	Identified opportunity	Medium – High	Grant/funding application
	39	Installation of ablutions and semi-permanent tents	Existing	Concentrated	Identified opportunity	Low – Medium	Grant/funding application
Banthula	40	Formalisation of onshore experiences for cruise ships	Existing	Concentrated	Identified opportunity	Low	Strategic planning
Galawarra	41	Installation of semi-permanent tent accommodation	New	Concentrated	Identified opportunity	Low – Medium	Grant/funding application
	42	Development of bush walk experience	New	Concentrated	Identified opportunity	Medium – High	Grant/funding application
	43	Formalisation of onshore experiences for cruise ships	New	Concentrated	Identified opportunity	Low - Medium	Strategic planning

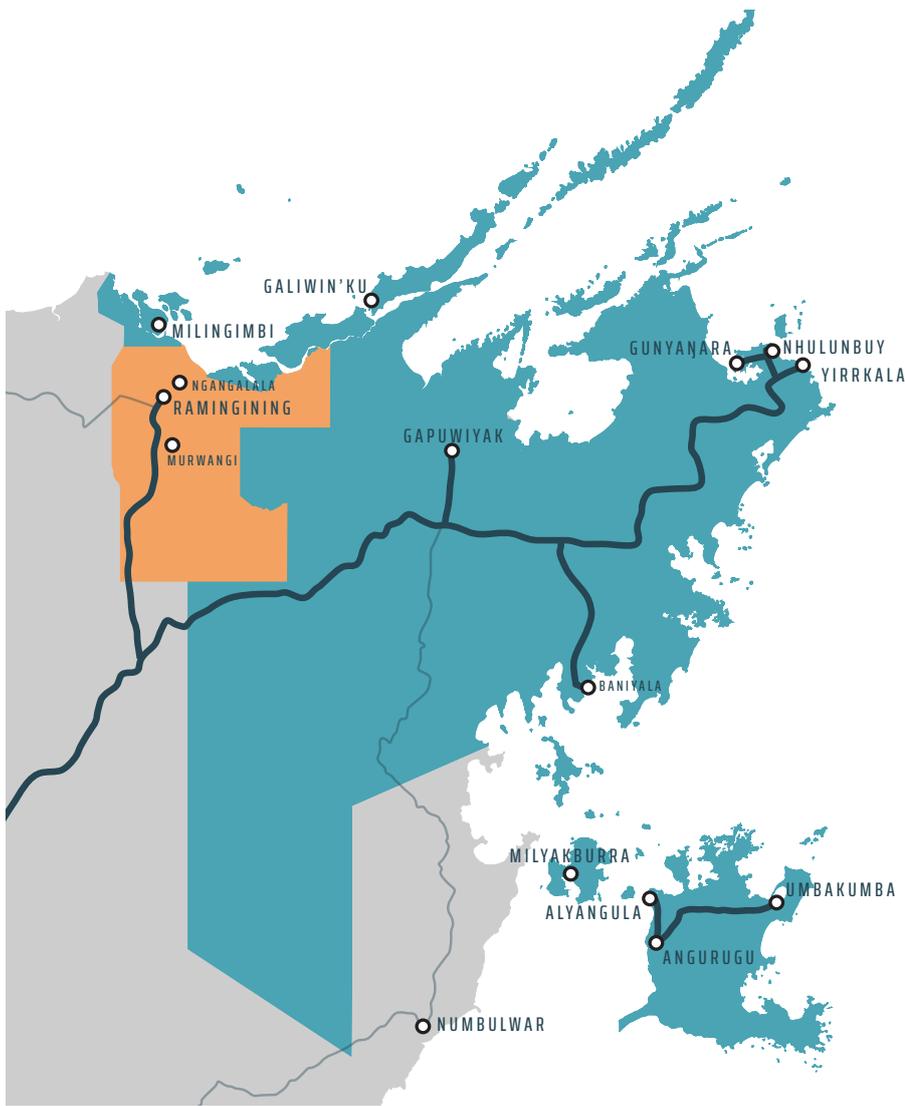
Product opportunities
Nature-based offerings
Aboriginal cultural offerings
Drive journey offerings
History and heritage offerings
Quality facilities

Level of stakeholder support	
Concentrated	Local community, individual or single government agency
Broad	Community + others, or multiple agencies
Extensive	Community, government, multiple agencies and/or industry

Estimated scale of investment	
High	+\$1 million
Medium	\$0.1 - \$1 million
Low	\$0 - \$100,000



Nyinyikay homeland - Galiwin'ku and Wessel Islands
Image: Tourism NT/James Fisher



Ramingining and Arafura Swamp

The Ramingining and Arafura Swamp region incorporates the community of Ramingining and 10 homelands. The region has an estimated population of 1,193.⁷⁵

Ramingining is located on the edge of the heritage listed Arafura Swamp, a vast, pristine wetland that supports an abundance of threatened, rare and lesser-known wildlife.

Access to Ramingining is by road or by air. Drive time from Nhulunbuy is approximately eight hours (420km) via the Central Arnhem Road and Ramingining access road. Regular scheduled flights are available from Gove and Darwin. Surrounding homelands are accessible by road and charter flight.

Ramingining and Arafura Swamp - current tourism assets

Accommodation

	Total rooms	Maximum capacity
Ramingining		
Dinybulu Lodge	19	21
Mona Lodge	2	6
Murwangi		
Murwangi Safari Camp	12	24

Attractions

Ramingining	
Art centre	A Yolju owned organisation with its core objective being to preserve and foster Yolju culture, Bula'bula Arts represents over 150 artists from Ramingining and surrounding homelands.

Ramingining and Arafura Swamp - product development opportunities

	#	Product opportunities	Product status	Level of stakeholder support	Current status	Estimated scale of investment	Possible action
Ngangalala	44	Establishment of visitor access to the Ngangalala boat ramp to launch boats into the Glyde River	Existing	Broad	Identified opportunity	Low	Business case
	45	Development of floating jetty	New	Broad	In progress	High	Grant/funding application
Ramingining	46	Establishment of water taxis between Ramingining and Milingimbi	New	Broad	Identified opportunity	Medium - High	Feasibility study
	47	Expansion of the Bak'bididi Festival to welcome small groups of tourists	Existing	Broad	Identified opportunity	Medium	Feasibility study
	48	Establishment of camping facilities	New	Broad	Identified opportunity	Medium – High	Business case
Arafura Swamp	49	Establishment of camping facilities	New	Concentrated	Identified opportunity	Medium – High	Business case
	50	Establishment of bird watching/wildlife tours	New	Concentrated	Identified opportunity	Low - Medium	Business case

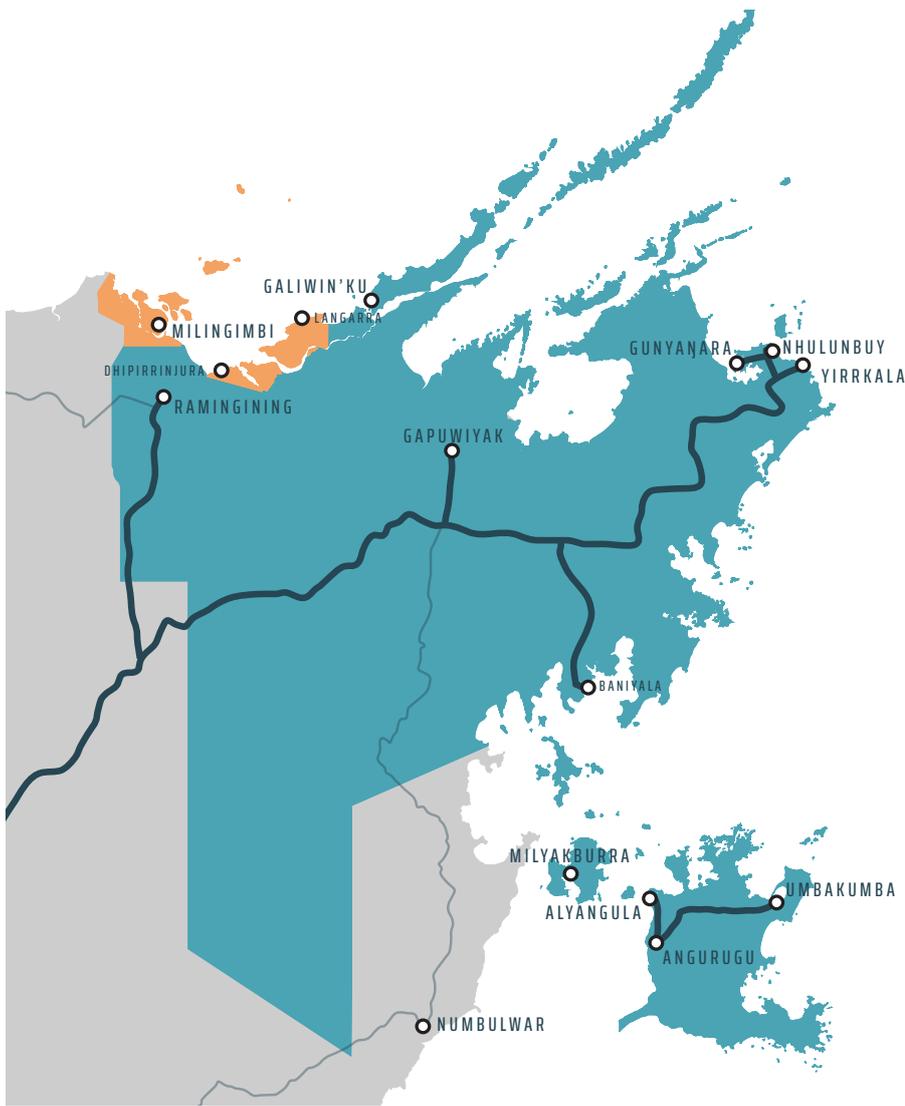
Product opportunities
Nature-based offerings
Aboriginal cultural offerings
Drive journey offerings
History and heritage offerings
Quality facilities

Level of stakeholder support	
Concentrated	Local community, individual or single government agency
Broad	Community + others, or multiple agencies
Extensive	Community, government, multiple agencies and/or industry

Estimated scale of investment	
High	+\$1 million
Medium	\$0.1 - \$1 million
Low	\$0 - \$100,000



Ramingining wetlands - Ramingining and Arafura Swamp
Image: DEAL



Milingimbi and Crocodile Islands

The Milingimbi and Crocodile Islands region contains the community of Milingimbi and six homelands. The region has an estimated population of 1,579.⁷⁶

Access to Milingimbi is by air. Regular scheduled flights are available from Gove and Darwin. Homelands are primarily accessible by boat and charter flight. Barge services allow vehicles to travel from Ramingining to Milingimbi.

Milingimbi and Crocodile Islands - current tourism assets

Accommodation

	Total rooms	Maximum capacity
Milingimbi		
Rolku Lodge	21	23
Dhipirrinjura		
Dhipirri Barra & Sportfishing Lodge	6	15

Attractions

Milingimbi	
Art centre	Milingimbi Arts and Culture is a community owned art centre representing the artists of Milingimbi. Many of Milingimbi's artists both past and present are represented in international collections.
History	Adjacent to the Milingimbi Airport sit plane wrecks which crash landed in Milingimbi during the bombing of Milingimbi in 1943. Earth bunkers used to shield anti-aircraft weapons are still intact throughout the island.
Dhipirrinjura	
Guided fishing	Dhipirri Barra & Sportfishing Lodge is a specialist fishing lodge located close to Dhipirrinjura homeland, offering all-inclusive guided fishing.

Milingimbi and Crocodile Islands - product development opportunities

	#	Product opportunities	Product status	Level of stakeholder support	Current status	Estimated scale of investment	Possible action
Milingimbi	51	Development of a floating jetty	New	Broad	Identified opportunity	High	Business case
	52	Expansion of the Milingimbi Gattjirk Cultural Festival to welcome small groups of tourists	Existing	Broad	Identified opportunity	Medium	Feasibility study
	53	Development of walking tours of the World War II wrecks and bunkers of the island	Existing	Broad	Identified opportunity	Low	Business case
	54	Establishment of factory tours of Manapan Furniture	Existing	Concentrated	Identified opportunity	Low	Business case
	55	Development of bird watching/wildlife tours	New	Broad	Identified opportunity	Low	Business case
Langarra	56	Establishment of multi-day, cultural tours to Howard Island from Milingimbi	New	Broad	Identified opportunity	Medium – High	Feasibility study

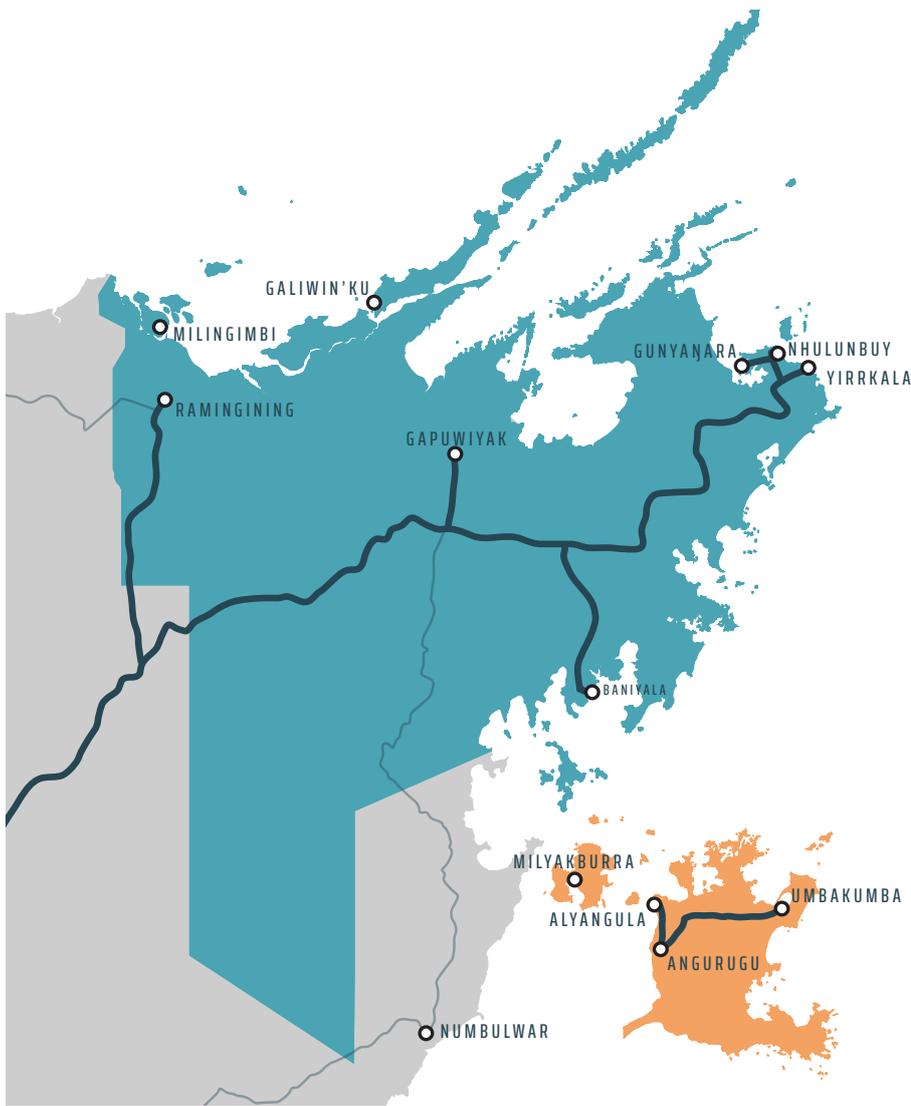
Product opportunities
Nature-based offerings
Aboriginal cultural offerings
Drive journey offerings
History and heritage offerings
Quality facilities

Level of stakeholder support	
Concentrated	Local community, individual or single government agency
Broad	Community + others, or multiple agencies
Extensive	Community, government, multiple agencies and/or industry

Estimated scale of investment	
High	+\$1 million
Medium	\$0.1 - \$1 million
Low	\$0 - \$100,000



Milingimbi World War II plane wrecks- Milingimbi and Crocodile Islands
Image: DEAL



Groote Archipelago

Groote Eylandt is Australia's fourth largest island and is located in the Gulf of Carpentaria, south east of Blue Mud Bay.

Groote Eylandt, along with Bickerton Island and the surrounding islands, make up the Groote Archipelago region. The region consists of the township of Alyangula and the communities of Angurugu, Umbakumba and Milyakburra and 14 homelands. It has an estimated population of 2,779.⁷⁷

Access to Groote Eylandt is by air or ferry. Regular scheduled flights are available from Gove and Darwin and passenger ferry connections are available from Numbulwar. Homelands on Groote Eylandt are accessible by road.

Groote Archipelago - current tourism assets

Accommodation

	Total rooms	Maximum capacity
Alyangula		
Groote Eylandt Lodge	60	120

Attractions

Groote Eylandt	
Art centre	Anindilyakwa Arts is a locally owned and operated organisation, which works with artists from across the Groote Archipelago.
Guided fishing	Groote Eylandt Sports Fishing operate fishing charters year-round from their base in Alyangula.
Anindilyakwa culture	Day tours showcasing the Eylandt's history, natural attractions and cave paintings.

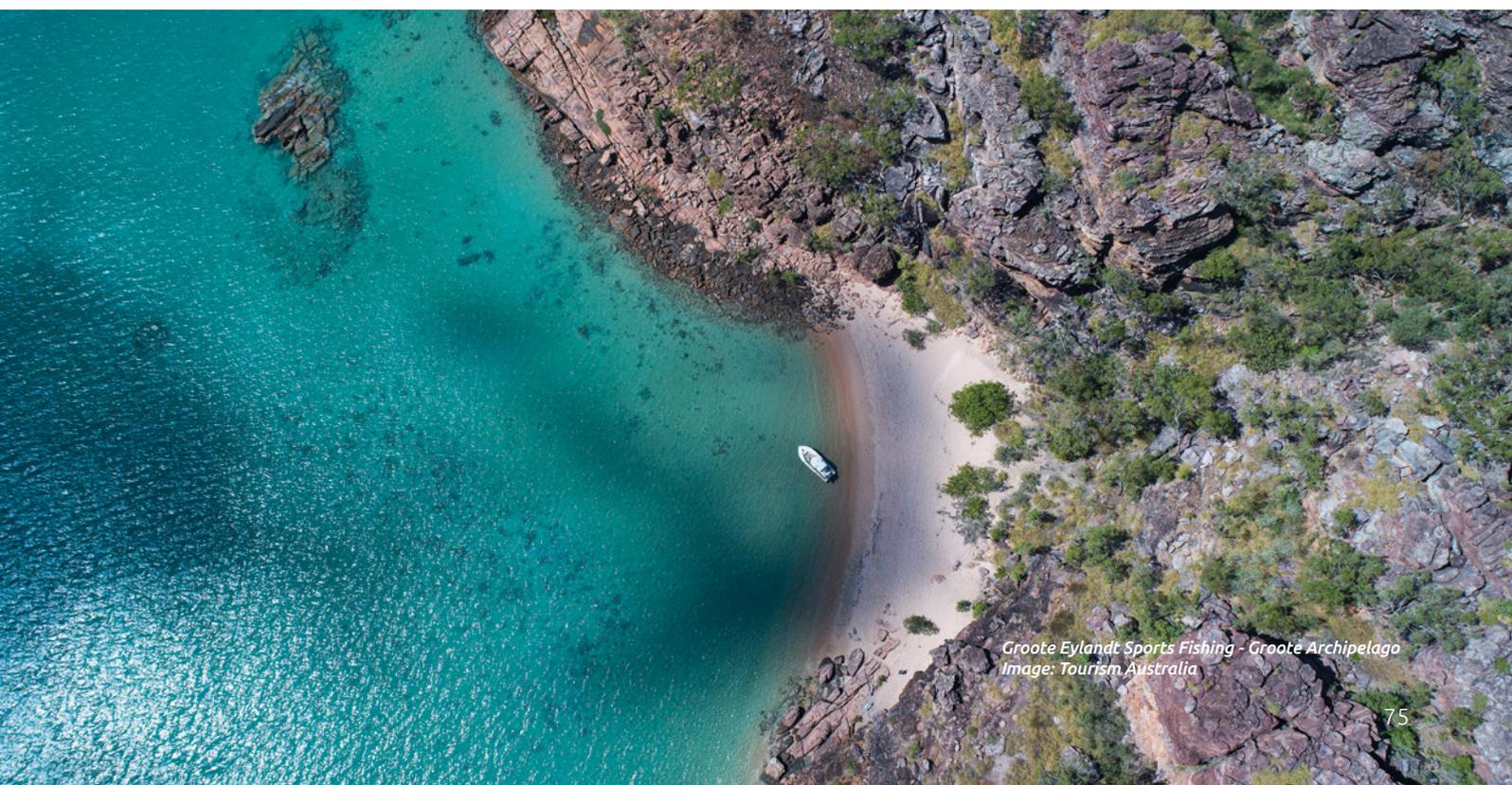
Groote Archipelago - product development opportunities

	#	Product opportunities	Product status	Level of stakeholder support	Current status	Estimated scale of investment	Possible action
Groote Eylandt	57	Formalisation of onshore experiences for cruise ships	New	Broad	Planned	Low	In progress
	58	Establishment of glamping accommodation options	New	Broad	Identified opportunity	High	Business case
	59	Establishment of camping infrastructure on select recreational areas	Existing	Concentrated	Identified opportunity	High	Business case
	60	Establishment of luxury fishing and adventure expeditions	New	Broad	Identified opportunity	High	Market assessment
	61	Establishment of shallow water (spear) fishing tours	New	Concentrated	Identified opportunity	Low	Market assessment
	62	Expansion of current 4WD tours	Existing	Broad	Identified opportunity	Low – Medium	Business case
	63	Creation of the Groote Eylandt Trans-Plateau Trek	New	Extensive	Identified opportunity	High	Feasibility study
	64	Establishment of cultural workshops (weaving, bush foods, bush medicine, bush dyeing, traditional healing)	New	Concentrated	Identified opportunity	Low	Grant/funding application
	65	Development of day cruises to recreational areas	New	Broad	Identified opportunity	Medium	Feasibility study
	66	Establishment of guided tours of Anindilyakwa Arts	Existing	Concentrated	Identified opportunity	Low	Market assessment
	67	Creation of boat hire service	New	Concentrated	Identified opportunity	Low - Medium	Market assessment
	68	Development of eco-tours in collaboration with land management organisations	New	Broad	Identified opportunity	Low – Medium	Feasibility study

Product opportunities
Nature-based offerings
Aboriginal cultural offerings
Drive journey offerings
History and heritage offerings
Quality facilities

Level of stakeholder support	
Concentrated	Local community, individual or single government agency
Broad	Community + others, or multiple agencies
Extensive	Community, government, multiple agencies and/or industry

Estimated scale of investment	
High	+\$1 million
Medium	\$0.1 - \$1 million
Low	\$0 - \$100,000





Section 4 Appendix



*Garanhan (Macassan Beach) - Gove Peninsula
Image: Tourism NT/Mark Fitzpatrick*

Passenger movements

Gove Peninsula

In 2014, passenger numbers to Gove Airport decreased significantly due to the curtailment of the Rio Tinto aluminium refinery. This decrease could be attributed to a decrease in FIFO workers using the airport and Qantas no longer offering passenger services to Gove Airport.

However, since 2015, passenger arrivals have increased from the lowest point by an average annual growth rate of 0.5%, with the airport welcoming over 29,500 passengers in 2019.⁷⁸

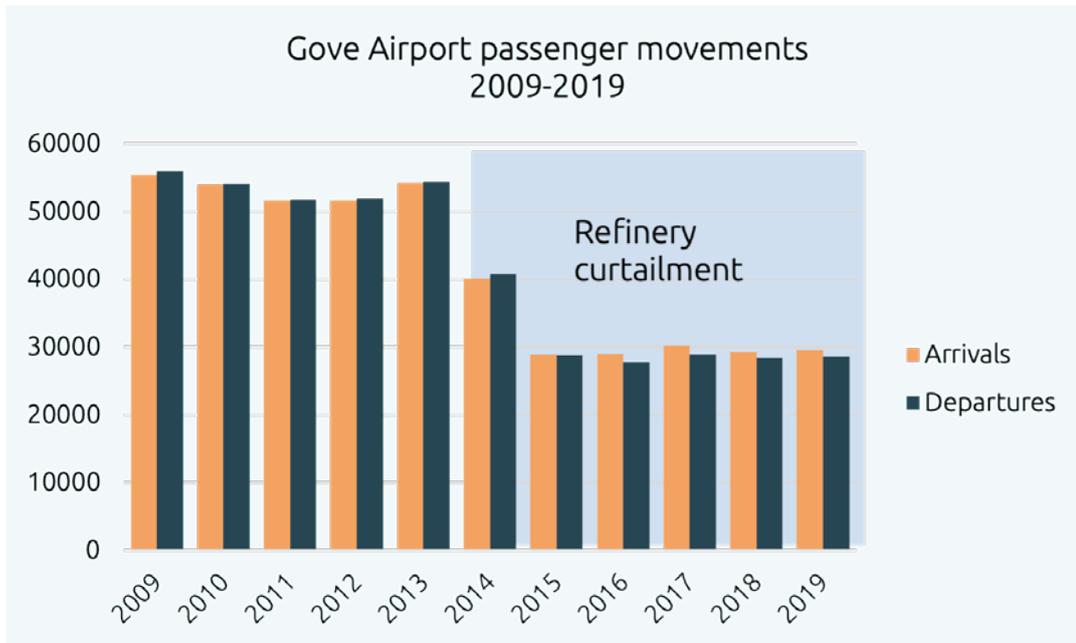


Figure 12 - Gove Airport revenue passenger movements (2009 - 2019)⁷⁹

Seasonality

Gove Airport sees a 28% increase in passenger arrivals in the dry season compared to the wet season.⁸⁰

The inconsistency between arrivals and departures over the dry season can largely be attributed to fly-in, drive-out tours offered by Outback Spirit.

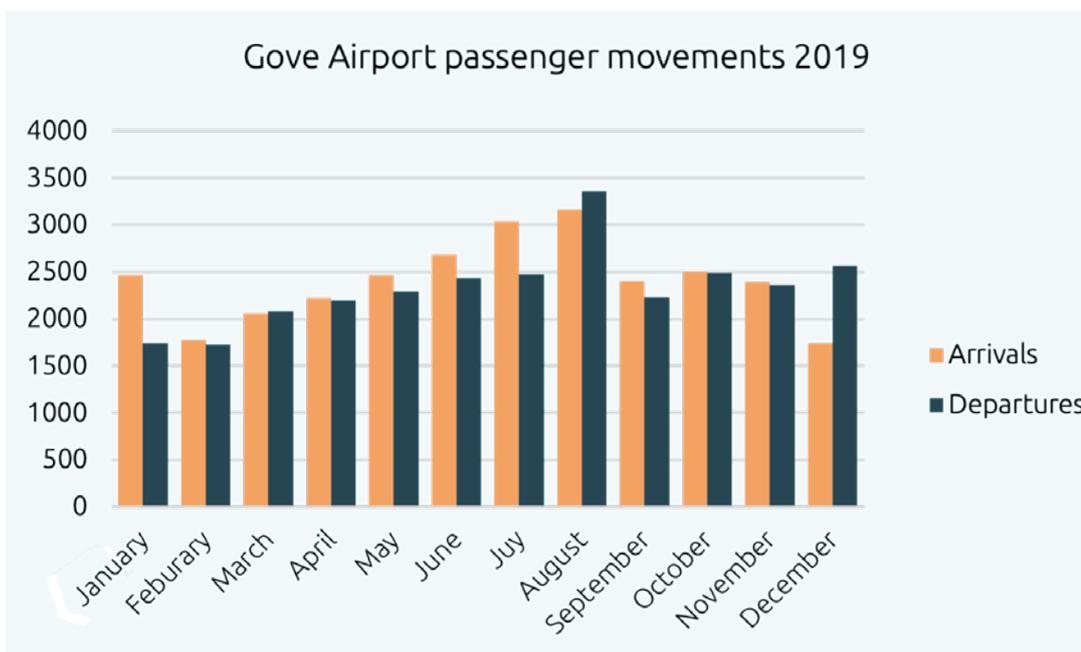


Figure 13 - Gove Airport passenger movements in 2019 by month⁸¹

Groote Eylandt

Groote Eylandt Airport recorded 17,427 passenger arrivals and 9,033 departures in 2019.⁸² This difference is likely due to the large reliance on charter airlines for mining operations on the island which may not be included in the figures presented by the Bureau of Infrastructure, Transport and Regional Economics (BITRE). The vast majority of passenger arrivals to Groote Eylandt are likely to be attributed to residents returning home and mining operations.

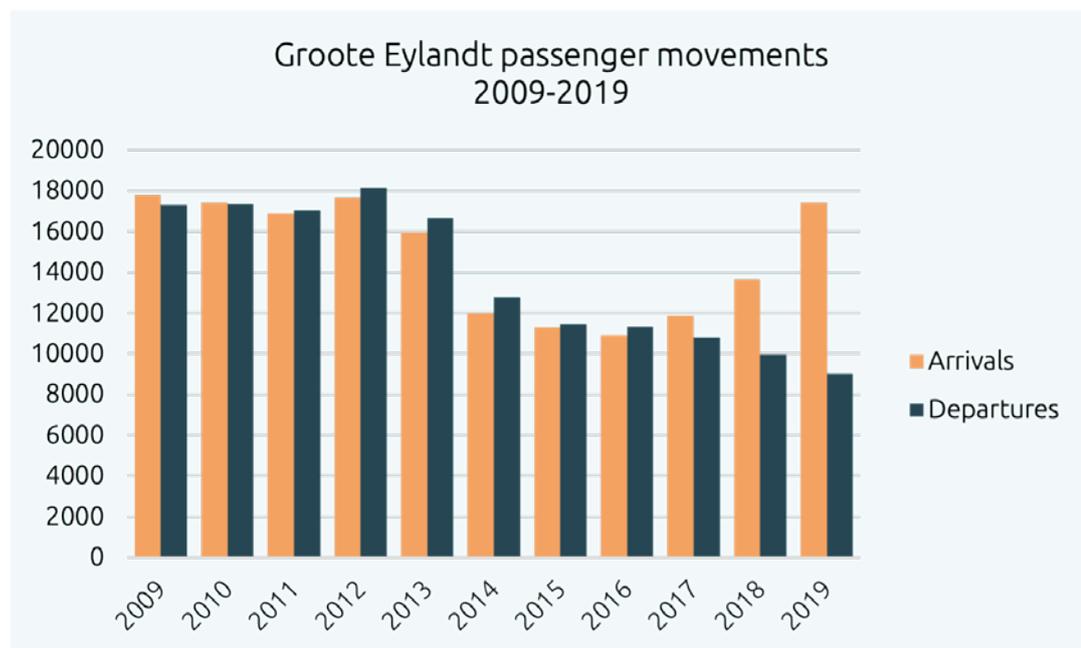


Figure 14 – Groote Eylandt Airport revenue passenger movements (2009 – 2019)⁸³

Elcho Island

Elcho Island Airport recorded 4,199 passenger arrivals and 3,938 departures in 2019.⁸⁴ This figure has remained reasonably constant over the past ten years.

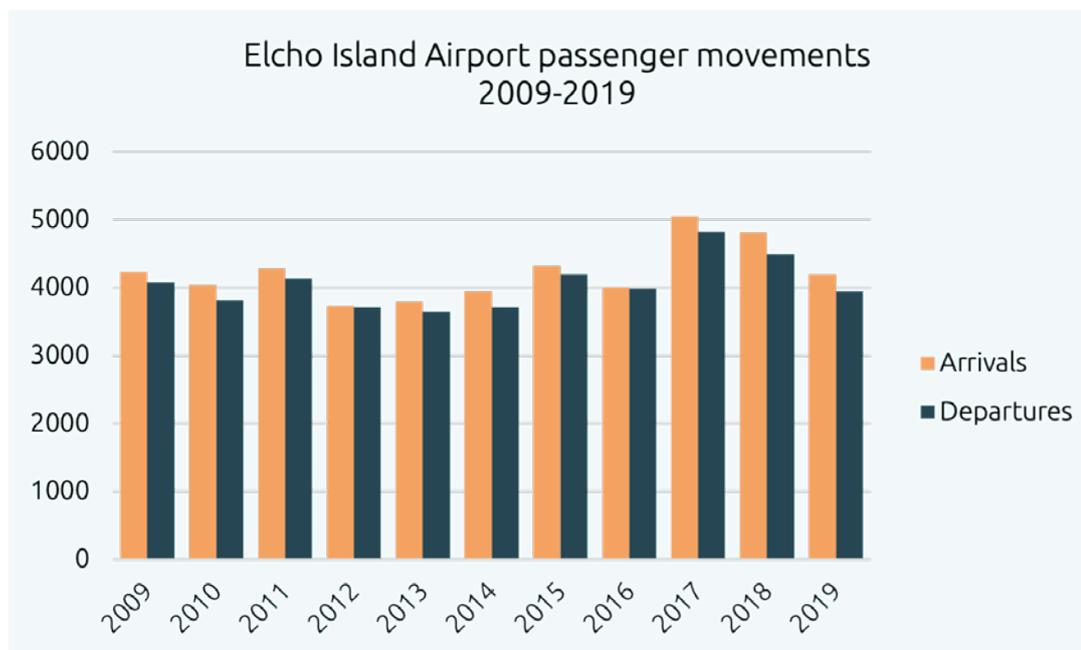


Figure 15- Elcho Island Airport revenue passenger movements (2009 – 2019)⁸⁵

Other major communities

The communities of Milingimbi, Ramingining and Gapuwiyak also receive regular scheduled services. Passenger movement data for these airports is not available from BITRE due to being under the reporting threshold of 7,000 passengers per annum.

Regional air routes

Table 7 - Regular Passenger Transport routes as of 1 July 2020

Airline	Flight segments
Airnorth ⁸⁶	<ul style="list-style-type: none"> • DRW – GOV – CNS – GOV – DRW • DRW – GOV – GTE – DRW • DRW – ELC – MNG – DRW • DRW – MNG – MGT – DRW • DRW – GTE – DRW
Alliance Airlines ⁸⁷	<ul style="list-style-type: none"> • CNS – GTE – CNS (restrictions apply)
Fly Tiwi ⁸⁸	<ul style="list-style-type: none"> • DRW – LEL – DRW • DRW – LEL – MGT – DRW • DRW – MGT – DRW • DRW – RAM – DRW
Chartair ⁸⁹	<ul style="list-style-type: none"> • DRW – GTE – DRW
Mission Aviation Fellowship ⁹⁰	<ul style="list-style-type: none"> • GOV – LEL – ELC – LEL – GOV – GTE – GOV • GOV – ELC – MGT – RAM – ELC – GOV – ELC – LEL – GOV • GOV – LEL – ELC – RAM – MGT – ELC – GOV • GOV – ELC – LEL – GOV – GTE – GOV • GOV – LEL – ELC – RAM – MGT – ELC – LEL – GOV

Key

Airport code	Airport name
CNS	Cairns Airport
DRW	Darwin International Airport
ELC	Elcho Island (Galiwin'ku) Airport
GOV	Gove Airport
GTE	Groote Eylandt Airport
LEL	Lake Evella (Gapuwiyak) Airport
MGT	Milingimbi Airport
MNG	Maningrida Airport
RAM	Ramingining Airport

Traffic monitoring

The Central Arnhem Road features two permanent road traffic monitors:

- REVDP001 - 35km West of Dhupuma Road turn off. This monitor measures traffic to and from the Gove Peninsula and excludes local traffic travelling to Dhimurru Recreational Areas
- RKVDP006 – 1km East of Stuart Highway. This monitor measures traffic entering and exiting the Central Arnhem Road on the Katherine side of the road.

These counters measure the frequency of various vehicles using the road. For tourism purposes, the count of inbound category 1 and category 2 vehicles is most useful to determine if there is a potential increase in tourism traffic to the region.

- Category 1 – Light vehicles
- Category 2 – Light vehicles towing a trailer, camper or caravan.

It is important to note road conditions heavily dictate road traffic.

REVDP001 - 35km West of Dhupuma Road turn off

The number of inbound category 1 vehicles to the Gove Peninsula has remained relatively steady over the past three years.⁹¹

The number of inbound category 2 vehicles has grown approximately 31% from 2017 to 2019.

The increase in category 2 vehicles may indicate an increase in visitors with camper trailers and caravans visiting the region.

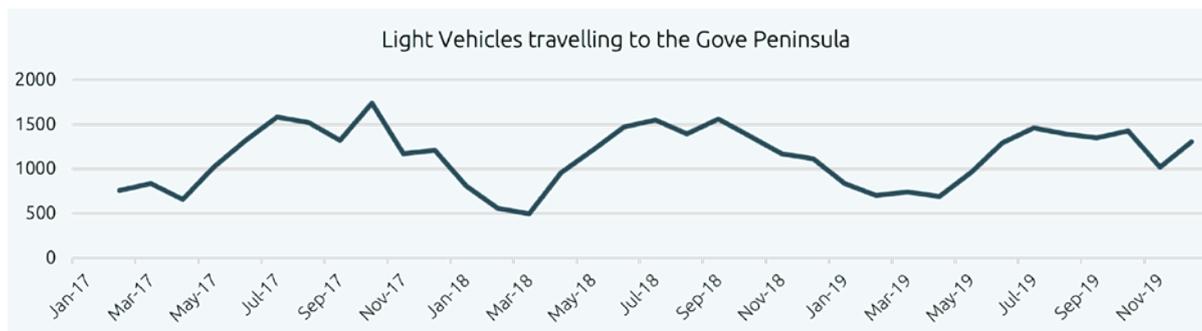


Figure 16 - Category 1 (light vehicles) travelling inbound to the Gove Peninsula (REVDP001)⁹²

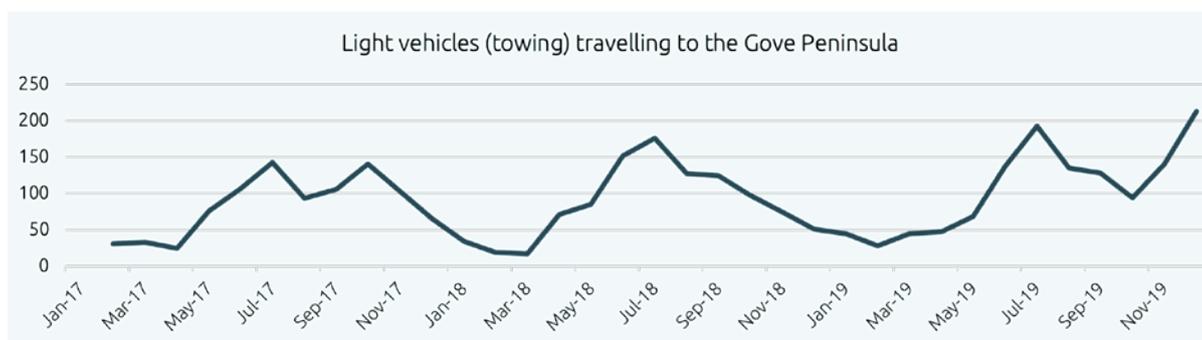


Figure 17 - Category 2 (light vehicles towing) travelling inbound to the Gove Peninsula (REVDP001)⁹³

RKVDP006 - 1km East of Stuart Highway

The number of inbound Category 1 and 2 vehicles entering the Central Arnhem Road has remained relatively steady over the past three years.

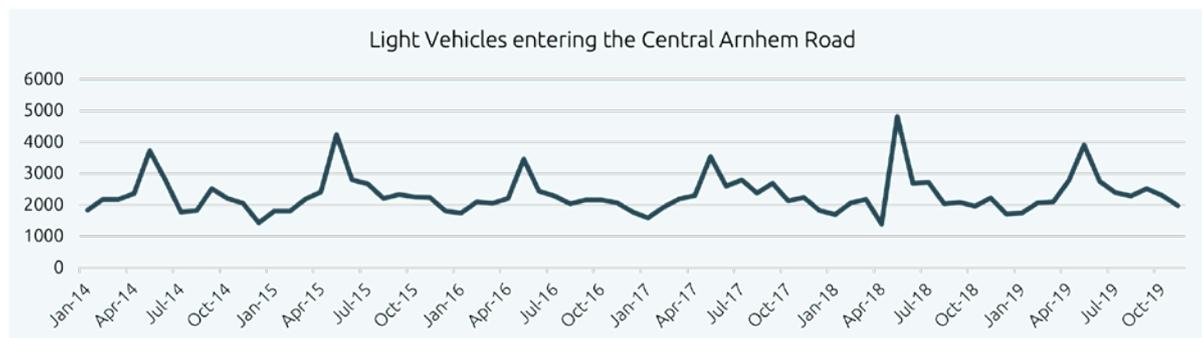


Figure 18 - Category 1 (light vehicles) entering the Central Arnhem Road from the Stuart Highway (RKVDP006)⁹⁴

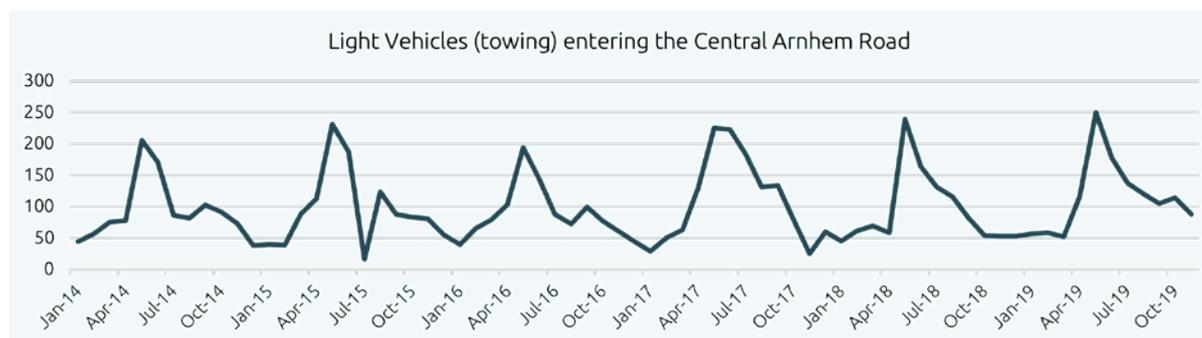


Figure 19 - Category 2 (light vehicles towing) entering the Central Arnhem Road from the Stuart Highway (RKVDP006)⁹⁵

Cruise arrivals

In 2019, East Arnhem Land was visited four times by three separate expedition cruise ships. These ships visited both Elcho Island and the Gove Peninsula.⁹⁶

Table 8 - Cruise arrivals to East Arnhem Land in 2019

Cruise Ship	Ports visited	Date	Passengers
Caledonian Sky (Darwin – Darwin)	Elcho Island	31/07/2019	87
	Gove Peninsula	30/07/2019	
	Elcho Island	27/08/2019	81
	Gove Peninsula	26/08/2019	
Coral Discoverer (Darwin – Cairns)	Elcho Island	6/10/2019	58
	Gove Peninsula	8/10/2019	
Le Laperoise (Darwin – Cairns)	Elcho Island	9/12/2019	170
	Gove Peninsula	10/12/2019	



*Expedition cruise ship off the Yirrkala coast - Gove Peninsula
Image: DEAL*

Socio-economic profile

Of those employed in the tourism industry, the most common industries were:

- cafes, restaurants, and takeaway food services (56.5%)
- air transport (20.7%)
- accommodation (7.3%).

Other tourism industries employing people in the region were: pubs, taverns and bars, road transport, travel agency and tour operator services and cultural services.⁹⁷

Population profile

The region's 2020 estimated resident population (ERP) was 14,565.⁹ Between 2011 and 2016, the region's population decreased by 1032 people, or 7.4%.⁹⁸ The region has a young population, with a median age of 27. This is lower than the NT median age of 32 and considerably younger than the Australian median age of 38. Over half (63%) of the population is under the age of 35.⁹⁹ The region's population is largely Aboriginal Australian (68.1%),¹ Australian (14.7%), and English (10.5%).¹⁰⁰

Education

Overall, in 2016, educational attainment in the region is lower than in the Northern Territory.¹⁰¹ Of people aged 15 and over, 31.1% have finished year 12 or higher, compared to 42.9% in the NT. In the region, 8.7% hold a bachelor's degree or higher, 3.6% hold a diploma or advanced diploma, and 14.3% hold a vocational qualification, compared to 17.1%, 7.2%, and 19.8% in the Northern Territory, respectively.¹⁰²

Labour force

In line with the decrease in population between 2011 and 2016, the size of the labour force decreased to 3,517 from 4,860. In 2016, 13.8% of the labour force in East Arnhem reported being unemployed, compared to 7.0% for the Northern Territory and 6.9% for Australia as a whole. The workforce participation rate is 43.9%, compared to 61.6% for the Northern Territory.¹⁰³

Income

Weekly household income in the region is lower than the Northern Territory. There is a smaller proportion of both lower and higher incomes. In 2016, 25.1% of households in the region earned \$2,500 or more weekly, compared to 28.9% of households in the Northern Territory.¹⁰⁴

Economic profile

The region had a Gross Regional Product of \$968 million in the year ending June 2020, a 6.42% increase from the previous year.¹⁰⁶ Mining is the largest employment industry, providing 1,038 jobs in 2019/20, which accounted for 18.1% of employment; this is a decrease from 1,290 jobs in 2014/15. Health care and social assistance is the second largest employment industry, accounting for 16.6% of employment in the East Arnhem region, followed by education and training which accounts for 14.2% of employment. These three industries account for 48.9% of employment in the region. Emerging industries from 2014/15 to 2019/20 include health care and social assistance, other services, education and training, and arts and recreational services which added 511 local workers in the time period.¹⁰⁷

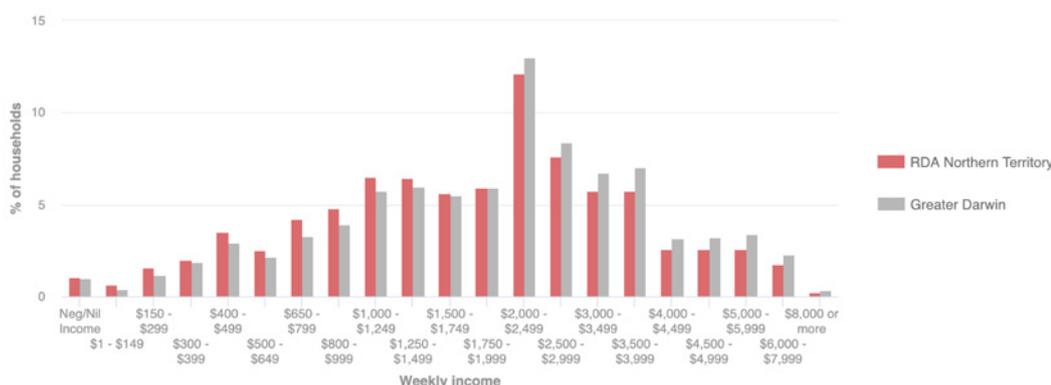
Mining in the region generated \$466 million in 2019/20, down from \$1,396.1 million in 2014/15. This accounted for 53.1% of the total value added to the East Arnhem Land economy. Health care and social assistance accounted for an additional 10.9% (\$95.7 million), while education and training added \$70.7 million (8.1% of value added). Public administration and safety added \$65.7 million, and these four industries accounted for 79.6% of all value added.¹⁰⁸

In 2020, there were 229 businesses registered in the East Arnhem region, 20.5% of which were in construction.¹⁰⁹

Other industries included:

- Transport, postal and warehousing (15.7%)
- Rental, hiring and real estate services (10.0%)
- Accommodation and food services (7.4%).

Weekly household income, 2016



Source: Australian Bureau of Statistics, Census of Population and Housing, 2016 (Enumerated data). Compiled and presented in profile.id by .id (informed decisions).

.id informed decisions

Figure 20 - Weekly household income in East Arnhem Land, 2016¹⁰⁵

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