



Destination Northern Beaches

Creating a sustainable visitor economy



northern
beaches
council

Acknowledgement of Country

Northern Beaches Council wishes to acknowledge the traditional custodians of these lands and expresses respect to Elders past, present and future.



Image Credit: Mini Heath, The Aboriginal Heritage of Manly. Artwork commissioned for Councils' Heritage Plaques program, 1994.

The moon, the stars and the hands are in balance with Mother Earth, represented by the large circle; together they tell a story of caring and sharing. The contour lines reflect the foreshore and the landscape of Manly. The hands represent the family and unity. The large hands are those of the elders, whose wisdom is all important, the smaller hands represent children, our future.

The plaque was unveiled on the 3 July 1994 by Lowjita (Lois) O'Donoghue CBE AM, Chairperson, The Aboriginal & Torres Strait Islander Commission.

Appreciation for contribution

Thank you to the Northern Beaches community for their valuable contributions. Destination Marketing Store and TRC Tourism, wish to extend our appreciation to all who provided constructive and informative feedback throughout the process.

The draft Northern Beaches Destination Management Plan was prepared for Northern Beaches Council by:



Contents

Introduction	6	Destination Analysis	20	Strategic Approach	44
The Northern Beaches	8	Current situation and goals	22	The Northern Beaches target markets	45
Manly - Australia's best beach	10	Opportunities and challenges	26	What the travel markets want	47
Palm Beach - International visitor icon	14	Value of our visitor economy	28	Experience framework	48
Destination direction	16	Visitor research	30	Delivering The Plan	66
Our Vision and Goals	17	Insights into the domestic market in 2020	33	Tourism industry development	68
Altogether Extraordinary	18	Visitor survey	34	Tourism industry model	70
Key stakeholders and information used to inform the draft plan	19	Product audit	37	Partnerships	72
		Accommodation	38	Marketing and promotion	74
		Visitor Information Centre	40	Visitor servicing	76
		Competitor analysis	41	Measuring success and conclusion	77
				Glossary	78

Image credit:
Destination NSW





Introduction



From foreshore trails, pop-up markets, art exhibits and music festivals, **visitors to the Northern Beaches don't need to travel far from the city to feel like it was left way behind.**

The draft Destination Management Plan (DMP), Destination Northern Beaches: Creating a sustainable visitor economy is a five year strategic plan to guide the growth of our visitor economy. It is supported by a two year action plan, to provide a quick response to help local tourism operators rebound, recover and drive new business in the wake of the impact of the global pandemic.

It represents a new era of collaboration between our local industry and all levels of government that will help realise the economic potential of tourism for the region, balanced with the protection of the environment and upholding our social values.

The Northern Beaches

The Northern Beaches Council area is located on Sydney’s Northern Beaches, between 10 and 30 kilometres north-east of the Sydney CBD and is bounded by Cowan Creek and Broken Bay in the north, the Tasman Sea in the east, Sydney Harbour and North Harbour in the south, and Middle Harbour and the Ku-ring-gai Council area in the west.

It encompasses 254km² and includes urban and natural environments with just over 270,000 residents. The area is mainly residential and national park, with some commercial, industrial and rural areas, including substantial areas of water frontage, coastal foreshores, beaches, islands, national parks, bushland and reserves.

The open coast spans over 80 kilometres, with 24 ocean beaches, 27 coastal and public rock pools, 36km of coastal walkway, five aquatic reserves, two National Surfing Reserves and four intertidal protected areas. A mix of five coastal lagoons, three major estuaries, waterways and beaches. Approximately 15,500 hectares of bushland is located in national parks.

The Local Government Area (LGA) boasts one of the highest urban tree canopy coverages in Greater Sydney and a diversity of open space. It includes scenic and cultural landscapes that form part of the local identity and supports the local economy.

The Metropolitan Rural Area provides a buffer to surrounding national parks, supporting environmental conservation, Aboriginal heritage and culture, rural and employment uses and critical infrastructure.

Map 1:
Experience map of the Northern Beaches²



As the experience map and product audit shows, the visitor offerings are spread across the Northern Beaches region, but are especially concentrated in tourism hotspots of Manly and to a lesser extent Palm Beach.

This experience map highlights offerings across the diverse landscape that stretches from Manly to Palm Beach and reaches into the natural bushland and rural areas.

To maximise the potential economic value from the Northern Beaches as a tourism destination, we will need to assess and work with our local industry to improve product choice, quality and investment in infrastructure.

² Source: Northern Beaches Council - Local Strategic Planning Statement

Manly

Australia's best beach (Tripadvisor)

Manly has a long-standing reputation as a **seaside holiday destination** for both Sydneysiders and people visiting from NSW regional areas.



For many years Manly has been known as the official gateway for tourism on the Northern Beaches and is renowned the world over for its setting between the harbour and its famous surf beach. Named "Australia's best beach" in TripAdvisor's 2017, 2018 and 2019 Traveller's Choice awards, Manly is a mecca of spectacular scenery with a rich and diverse history.

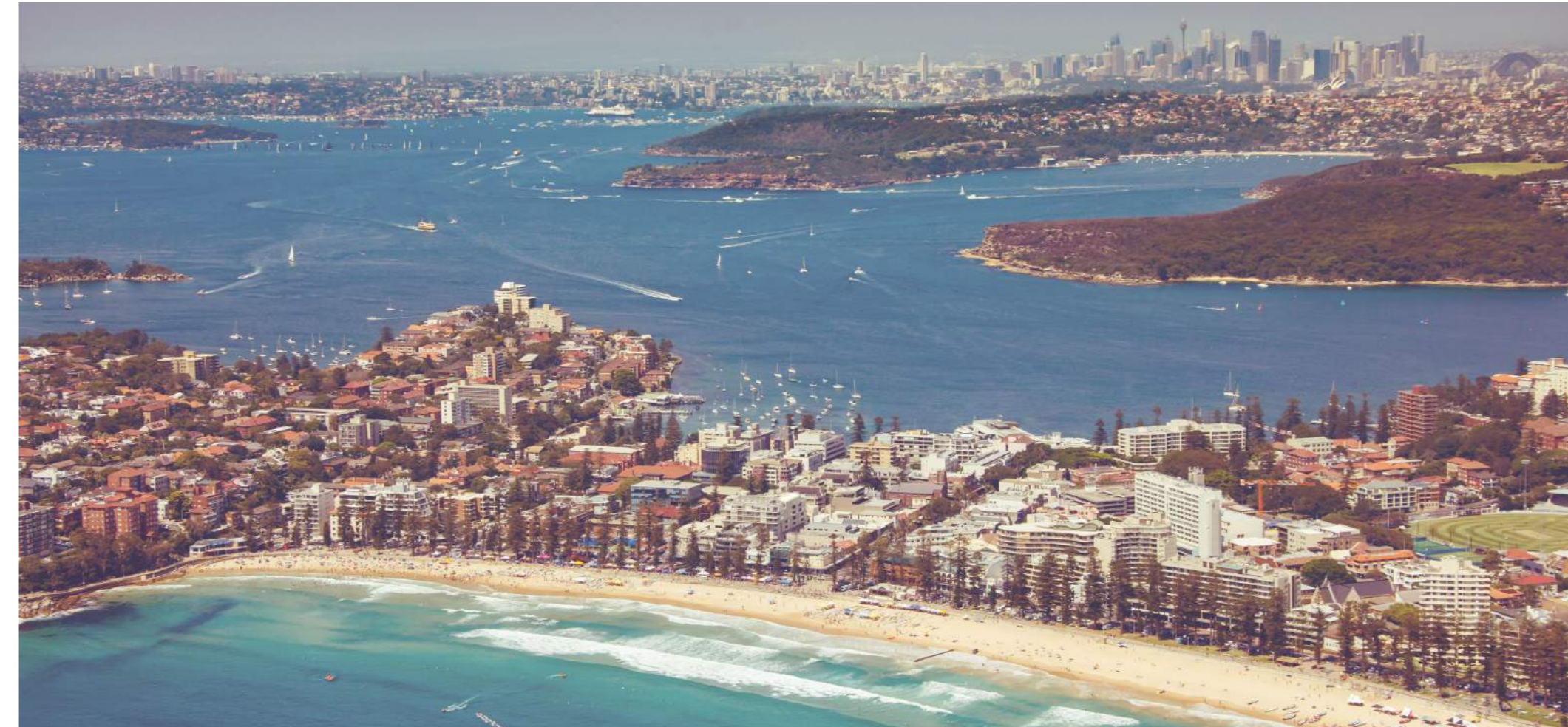


Best of the Best

The ferry journey between Circular Quay and Manly is one of the world's most famous and a must-do for every visitor to Sydney. Manly's geographic location allows visitors to feel both connected and secluded which comes from an awareness of water on both sides of the peninsula and its separation from the city.

The gateway precinct which extends from East to West Esplanade reserves, covering the 16-foot skiff sailing club, the Visitor Information Centre, former aquarium site, Manly Pavilion, Federation Point, and Manly Art Gallery and Museum which is one of 40 regional and public galleries in NSW.

Image credit:
Destination NSW



Manly was named by **Captain Arthur Phillip** in **1788** because he was so impressed by the confidence and manly behaviour of a group of Aborigines.



Aboriginal engraving,
Allambie 1991

The quaint town centre is bordered by popular foreshore areas that connect the Bondi to Manly walk, Northern Beaches Coast Walk, North Head National Park and Cabbage Tree Bay Aquatic Reserve. The oceanfront features a world-class walkway to Shelly Beach where visitors and locals have the choice to swim, surf, snorkel or kayak, take a walk along the beach or bike ride to Queenscliff. Visitors and locals enjoy the many laneways filled with cafes and retail shops. Importantly, Manly is the only designated late-night precinct on the Northern Beaches with many restaurants and bars throughout the town centre.

Manly's tourism is primarily distributed amongst:

- Beaches and walking trails – the majority of which are free experiences;
- Water sports and activities, including kayak hire, SUP, diving experiences;
- Health and wellness, a place to refresh and engage with many fitness products including gyms, yoga and pilates.

Manly has a number of significant public spaces and buildings that are listed as items of Environmental Heritage and are important in understanding the history of the place but which also contributes to the streetscape through their period style scale and build form.

The positioning of Manly as an attractive overnight destination is key, in order to generate stronger economic value. Achieving this, whilst maintaining the attributes of a harbour side urban centre and residential enclave is the challenge.

The destination must be balanced with the needs of Manly's residents and other specialised uses such as Australia's first hospice for adolescents and young adults, Soldier On Innovation Hub (a veterans' rehab centre at North Head) and Royal Far West (a provider of health and education services for country children and their families).

Throughout the recent past, Manly has played host to **world titles in swimming, surfing and surf life saving** contributing to its reputation as an **iconic beach**.

People in Manly are the highest users of active and public transport compared to other centres on the Northern Beaches. The onward connection to other parts of the Northern Beaches can be lengthy for both locals and visitors. Addressing this will improve the dispersal of visitors, making it easier for people to travel to Manly without a car and reduce demand for parking in the town centre. One possible solution is the development of an improved regional cycling route to Dee Why with improved end-of-trip facilities, such as bike storage.

Manly is a destination that has been popular since the 1900s and there are opportunities to weave the Corso's significant cultural and social heritage values into the revitalisation of laneways and pedestrian paths.

The Manly community is recognised for its arts and creative industries and, as such, strengthening this aspect of Manly would also be valuable.



Palm Beach

International visitor icon

At the opposite end of the regional destination, Palm Beach is extremely popular for its natural amenity including the heritage listed Barrenjoey Lighthouse, an abundance of exclusive beachfront and clifftop properties, waterfront cafes, boutique shopping and fine dining all add to the relaxed elegance of Palm Beach.

Governor Phillip named Barrenjoey Head and it's believed that the Aboriginal word "barrenjoey" meant "a young kangaroo". Climb to the top and you can see Pittwater to the west, the Pacific Ocean to the east, and Broken Bay to the north.

The main ocean beach, which is 2.3 km long, is ideal for walking, jogging and surfing. At the southern end there is a 35 metre rock pool.

Also famously know as Summer Bay to viewers of the TV show Home and Away attracting many visitors from Sydney with an opportunity to meet the local actors and submerge themselves in a little piece of heaven. More recently there are opportunities for recognition through the 2019 release of the quintessentially Palm Beach movie (comedy/drama) directed by Rachel Ward with a veteran cast, has firmly put Palm Beach on the map for Australian and New Zealand visitors.

The whole precinct is characterised by spectacular sea views, water access via ferry, seaplane or boat and has extensive public parklands and short walks.

There are opportunities to create further unique visitor experiences with potential designation of the headland as an Urban Night Sky Park, as well as access to bespoke visitor accommodation on Pittwater and its foreshores.

Image credit:
Destination NSW



Destination direction

Planning for a sustainable visitor economy is guided by a suite of plans and strategies including the Community Strategic Plan Shape 2028, Environment and Climate Change Strategy 2040, Arts and Creativity Strategy 2029, Transport Strategy 2038, Pittwater Waterway Strategy 2038, Open Space and Recreation Strategy, Strategic Planning, Events, Digital Transformation and the Customer Experience Strategy.

To develop this plan, we involved and evaluated feedback from the local tourism industry, community and Council's strategic reference group along with the latest research in domestic and global tourism trends. From this engagement a comprehensive situational analysis was developed.

Digging deeper, feedback from our local businesses and tourism operators was captured at the inaugural Northern Beaches Industry Tourism Summit in 2019, from a tourism industry survey and numerous local visitor surveys conducted in Manly and Palm Beach between 2018-2020.

This has helped shape the plan to ensure the strategic directions and framework provides our local industry with the tools to effectively take advantage of tourism opportunities for the Northern Beaches.

To realise the economic potential of tourism on the Northern Beaches whilst protecting the environment and local culture, Council together with local industry, needs to focus on attracting higher yield visitors, encourage visitors to stay longer and promote visitation to spread across the seasons and throughout the region.

To be a sustainable destination means we have sustainable policies and practices in place to:

- Help businesses become sustainable and potentially regenerative in line with UN Sustainable Development Goals (i.e. net positive impact on local and connected environments, communities, cultures, and economies)
- Guide travellers and travel-providers to choose sustainable suppliers and sustainable tourism programs
- Offer networking programs and focus groups for achieving sustainable tourism goals
- Recognise sustainable tourism providers.

Our vision

The Northern Beaches is an extraordinary destination offering world-class beach and bushland experiences, with vibrant villages that reflect our contemporary coastal lifestyle.

Our goals

1. Build awareness of a single, unifying identity for Sydney's Northern Beaches
2. Transition from day-visitors to overnight visitors and encourage greater regional dispersal
3. Increase yield, length of stay and repeat visitation
4. Address seasonality - increase visitation during low and shoulder seasons
6. Build a resilient and capable tourism industry and strengthen and enhance collaboration
7. Respond to COVID-safe practices and resulting market trends, desires or expectations



A destination's brand identity is the sum of all the stories about the destination and the experiences visitors have during their stay. It is a perception of 'place' that lives in the mind of the visitors. Together, with the local tourism industry, we have crafted a Destination Statement that succinctly reinforces the region's strengths and underpins the experience themes.

The Northern Beaches is an extraordinary destination offering **world-class beach and bushland experiences**, with vibrant villages that reflect our **contemporary coastal lifestyle**.

Figure 1
Northern Beaches Council - Plan Structure

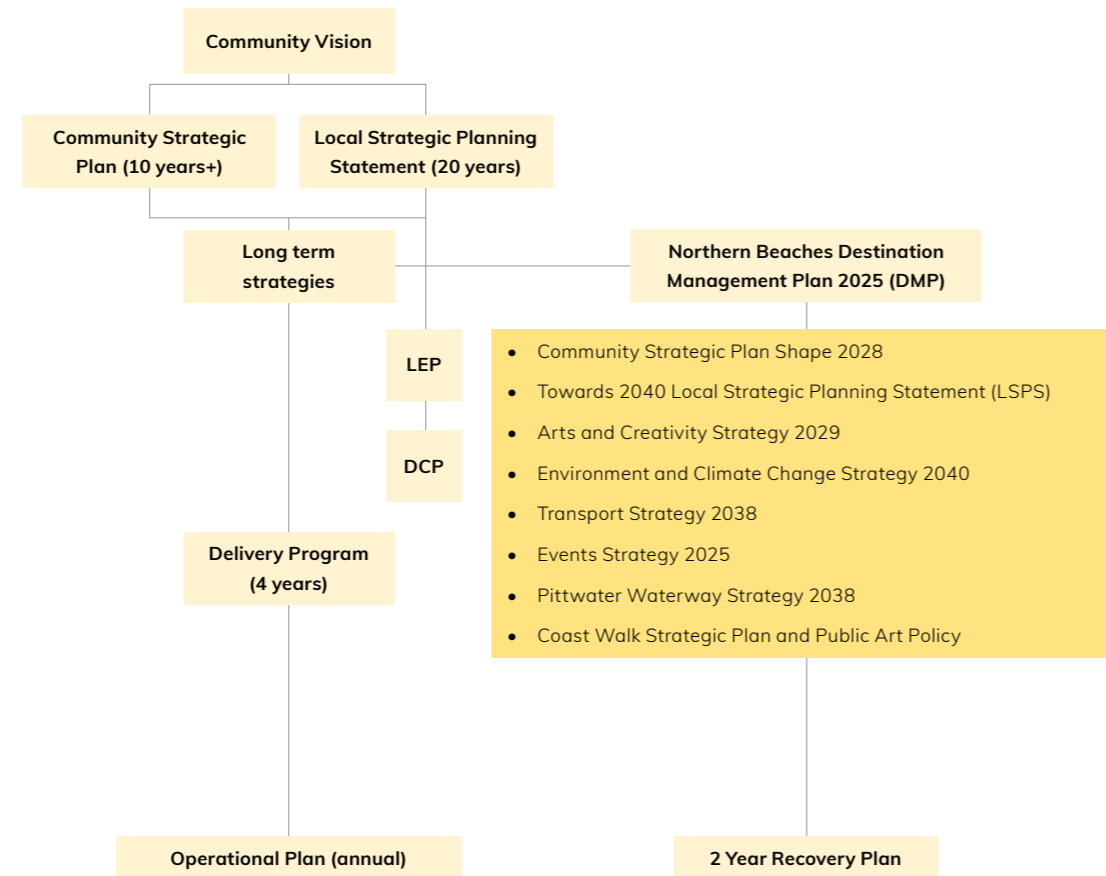
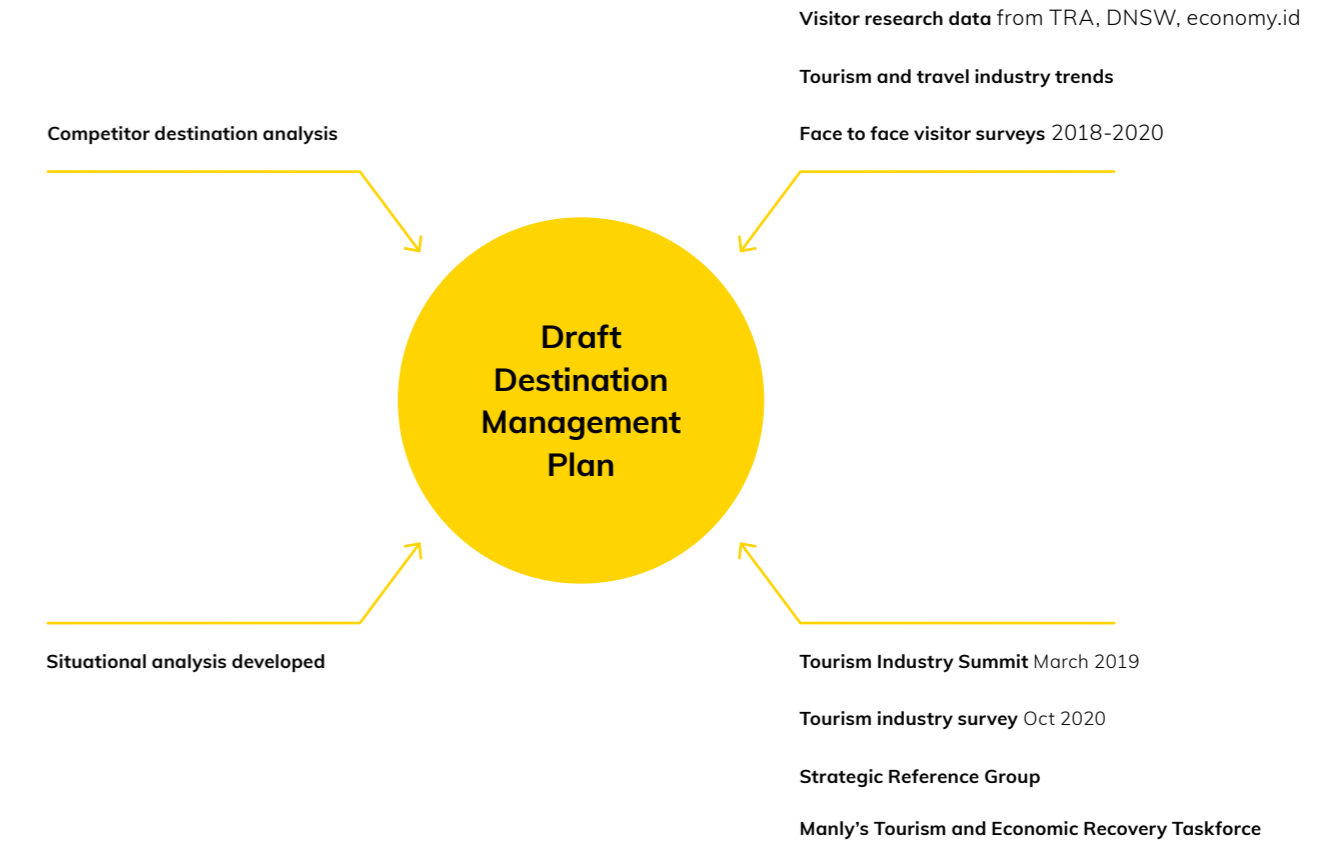


Figure 2
Northern Beaches Council - Plan Structure





Destination analysis



Travellers are eager for **cultural experiences** that are more interactive than gazing through the window of a tour bus. **They want to know where the hidden gems are, and they want to connect with the local culture and people.** Locals are offering insider tours, and global companies are partnering with local players to up their authenticity.²

²SKIFT+ Expedia Report, November 2018

Current Situation and Goals

There is no way to accurately predict what will happen following the end of the COVID-19 pandemic or even when it will end. Yet, there is little doubt that once the COVID-19 pandemic resolves, people will be more than ready to socialise and travel again.

As part of the strategic planning process for Destination Northern Beaches, a number of representatives from Manly's Tourism and Economic Recovery Taskforce were interviewed and local tourism operators took part in a survey to ascertain how their businesses were coping. This has assisted in identifying specific challenges and opportunities as well as capturing the ambition of the industry.

The tourism operator survey conducted in September 2020 found COVID 19 was having a significant impact on their business viability. Of those operators surveyed, 84% stated that their businesses overall were 'majorly' or 'severely' impacted by COVID-19, and 33% noted sales revenue was down 50-75% with a further 31% cited sales revenue down 25-50%.

Closure of both national and international borders is significantly impacting these tourism operators' customer base. However, nearly 50% of customers were identified as coming from Greater Sydney, which given travel restrictions, is likely to have significantly grown in share.

Since March 2020, like elsewhere we have seen substantial job losses, especially in the tourism and hospitality sectors, as a result of travel restrictions and social distancing measures. Today there are 5,000 fewer jobs on the Northern Beaches than this time last year (-4.5%), the majority from the 'Accommodation & Food' sector (-3,000 jobs).

It has been identified that new source markets, marketing and promotional assistance to tap into the increasingly growing local 'market' were needed. Access to financial support to manage cashflow and also financial support to plan for recovery were also cited as key areas of ongoing support.

Insights into the rebound of the tourism market post COVID-19

Research is already indicating some highly relevant insights into the dynamics of the tourism recovery. These include:

- People are very keen to reconnect with family and friends, including inter-generational reunions with grandparents and close friends from whom they have been separated.
- Travellers will want to re-engage in social activities.
- Increased interest in outdoor and recreational activities, especially to maintain health and wellbeing.
- Special interest and niche markets are likely to become more active as people's motivation to reignite their passion or interest increases.

Based on feedback from local tourism industry and review of past and recent visitor data, below are some overarching challenges and goals to realising greater economic potential of tourism on the Northern Beaches. Looking beyond visitor numbers these include, digital representation, visitor servicing, seasonality, dispersal, average length of stay and visitor spend, and as key priorities in defining success.

Improve digital representation	Build awareness of a single, unifying identity for Sydney's Northern Beaches to be used across online, digital, social media channels
Enhance visitor servicing	Create a single multi-channel contact centre or hub to service all enquiries across all customer channels from voice to email, Live Chat, online and digital including social media
Address seasonality	Encourage visitation throughout the year to improve business and local centre viability and avoid concerns of over-tourism during peak season and weekends, through off-peak season campaigns
Encourage visitor spread	Encourage visitation across the region (especially in-land and north) to share the benefits and manage impacts through connection, promotion and packaging of attractions/experiences
Extend duration of stay	Encourage visitors to stay longer (ideally convert day trippers to overnights) by increasing the range of accommodation and overnight experiences
Increase visitor spend	Encourage visitors to spend more (yield) by targeting high yield (luxuriant) markets through bespoke product development and promotion

Below summarises these current challenges and goals.

1) Improve digital representation

A significant challenge for the Northern Beaches is the lack of a single Council owned destination website and social media channel that offers an easy way for visitors or potential visitors to find out more about the destination. Given that social isolation and work/education from home were primary measures taken nationally during initial response to COVID-19, many more people are now online and engaging in digital platforms more than ever before and across all demographics. It has increased familiarity with online and digital environments, including for face-to-face social networking and direct communication. This means that into the future, the online channel will be even more important as a channel to reach, inspire, engage and connect with your audience. E-commerce is now an essential not a 'nice to have.'

2) Enhance visitor servicing

Council owns or manages extensive number of digital visitor servicing channels, there is not, however, a consistent naming protocol. Reimagine Manly Visitor Information Centre and services to create a single multi-channel contact centre. One which services the whole Northern Beaches tourism industry and visitors pre, during and post visitation.

3) Address seasonality

The local tourism and hospitality industry highlight the negative impact seasonality plays on their business viability, especially managing cashflow during the peaks and troughs. Seasonality also impacts on the overall viability of our local centres which are more dependent on visitors (such as Avalon). Domestic overnight stays are highly seasonable with only 6% of visitor nights occurring during winter months. There has been identified a lack of all-weather attractions and visitor experiences in the region, including the closing of the aquarium, to support all-year-round visitation.

Opportunities to promote the Northern Beaches as an all-year-round visitor destination, especially encouraging overnight visitation during off-peak season, should be explored to address seasonality and support vibrant tourism businesses and local centres.

4) Encourage visitor spread

Visitors to the Northern Beaches are highly concentrated in tourism "hotspots", namely Manly and Palm Beach, with relatively few visitors to inland areas such as Forestville, Belrose, Terrey Hills. Concentration of visitors to these "hotspots" leads to community concerns of over-tourism and impacts on infrastructure and amenities. However, awareness of attraction away from hotspots and access to these can be a challenge, especially parking capacity and cost and balance between visitor and resident parking.

While Manly has been identified as the visitor gateway to the Northern Beaches, getting visitors out of Manly and dispersing them further up the beaches, is a challenge. Currently there is limited public transport to go to other visitor destinations further up the beaches, with local buses not catering to the needs of visitors (i.e. no suitcase carriers, no direct bus Manly to Palm Beach). Limited accommodation to the northern end and inland areas, as well as weaker experience offering in these areas, also restricts capacity to spread overnight visitation throughout the region.

Creating and promoting visitor experiences and accommodation options throughout the Northern Beaches, as well as packages and transport connections between these, will spread benefits of tourism across the region and potentially ease impacts on existing hotspots.

5) Extend duration of stay

Day-trippers (both domestic and international) make up around 75% of visitors to the Northern Beaches over the last 9 years. The challenge is that day-trippers spend significantly less than the overnight visitor and a key opportunity is to convert the day tripper to overnight visitor. Lack of tourist accommodation impedes overnight stays, particularly in the northern end of the region. There is a need to maintain a range of accommodation styles and experiences that would appeal to desired target markets. Including eco-friendly, sustainable and all ability access properties.

There is a limited understanding of capacity of existing visitor accommodation, how this aligns with target markets, as well as the potential impacts on local communities, especially Short Term Holiday Letting. Through better understanding of our visitor accommodation offering and planning for a diverse array of accommodation styles and overnight experiences, including the night time economy offering, there is scope to increase share of visitors who are staying overnight.

6) Increase visitor spend

Whilst Northern Beaches has seen high and steady growth in visitor numbers over the last 10 years, visitor spend has seen slower growth and continues to lag behind rest of Sydney and Australia (3.2% p.a. vs 9% p.a.).

Pre COVID-19 average visitor spend was significantly lower for visitors to Northern Beaches compared to Greater Sydney.

Furthermore, COVID-19 travel restrictions have resulted in a significant loss of international visitor dollars, which traditionally is the higher spend market.

Consequently, our visitor economy is underperforming and opportunities for these visitors to inject more spend into our tourism and hospitality sector are being missed. There is limited product experience to attract higher yield (luxuriant) markets and packaging of experiences to encourage visitors to stay longer and spend more. In particular, there are relatively few "export ready" products and packages targeting these markets, such as aboriginal tourism and/or nature-based tourism. Development and promoting of such export ready products would be a huge competitive advantage and result in attracting higher yield visitors to enhance performance of the visitor economy.

Opportunities and challenges

The Northern Beaches offers many great experiences and is well positioned to capitalise on a range of opportunities to further support and develop its visitor economy.

Figure 3
Key findings identified through industry and community consultation

Strengths	Weaknesses	Threats	Opportunities
<ul style="list-style-type: none"> Global reputation of Manly and Palm Beach Strong community values and identity Vibrant surf and outdoor sport culture Creative community of artists and cultural assets Diverse history, including Aboriginal heritage Spectacular waterways Broad event experiences both major and community Specialised tertiary education services Significant international student population Healthy Visitor Friends and Relatives (VFR) market 	<ul style="list-style-type: none"> Limited accommodation options, particularly in the northern end Perceived cost and limited parking capacity at peak times Constraints of transport and access to the Palm Beach area Influence of weather and seasonality of visitation Limited product experiences for Aboriginal and nature-based tourism Limited access to points of interest especially water-based places Constraints on recreational spaces and open spaces Lack of vibrant night-time economy and food offering in some places Poor perception of how the area is promoted to encourage greater dispersal and all year visitation 	<ul style="list-style-type: none"> Limited State and Federal Government funding for tourism development Vulnerability of tourism sector due to changing national and global economic conditions and value of the Australian dollar Impact of climate change and significant weather events on natural assets Sustainability of tourism industry that is weather dependant Perceptions of over-tourism Concerns of overcrowding and environmental degradation of key assets and attractions 	<ul style="list-style-type: none"> Develop a strategic approach to the visitor economy focused on visitor yield Leverage Coast Walk to spread visitation across the region Encourage longer stays (industry packages) Develop parking demand strategies Encourage active travel and public transport options Support development of boutique small-scale accommodation Develop and promote experiences and itineraries that highlight year-round visitation Increase promotion by working with Destination NSW and Tourism Australia Launch a dedicated destination website, involving industry partners Implement a new governance model with an industry-led focus

Image credit:
Destination NSW



Value of our visitor economy

Visitor expenditure contributed an estimated \$500 million to our local economy in 2018*. This revenue is vital to the year-round sustainability of our local industry which is supported by a supply chain that generates significant economic multipliers including other sectors, like hospitality and retail.

Northern Beaches Tourism and Hospitality sector accounts for 12% of all our jobs, many of which are locals themselves.

Figure 4*
Tourism and Hospitality Employment Figures 2018/19

Measure	Northern Beaches Council area	% of total industry	New South Wales %	Northern Beaches Council area as % of New South Wales
Tourism and Hospitality Employment Figures 2018/19				
Direct	8,949	8.2	5.1	4.4
Indirect	4,126	3.8	1.8	5.6
Total	13,075	12.0	6.9	4.7

* Source: <https://economy.id.com.au/northern-beaches/tourism-value?sEndYear=2018>
Source: Tourism Research Australia data on Northern Beaches supplied by TRA

Research shows that visitor expenditure growth over the last 10 years is significantly lagging behind Greater Sydney (3.24% pa vs 9.12% pa). Our visitor economy is currently underperforming compared to both the national and Sydney average.*

Further, average visitor spend over the last five years, has been markedly lower for visitors to the Northern Beaches, compared to Greater Sydney:

- Domestic Day - \$74 vs \$107 (40% below Greater Sydney average).
- Domestic Overnight stays - \$475 vs \$731 (35% below Greater Sydney average).
- International Overnight stays - \$2,027 vs \$2,289 (12% below Greater Sydney average).

When assessing visitation to the region, it is particularly important to note the difference between the types of visitors to the region. Visitor types to the region need to be separated into two categories.

- Locals: this includes all those who reside within a 25km radius. These visitors are not included in DNSW visitor statistics and, as a result, are not easy to quantify. They are, however, an important part of the visitor economy, particularly as Manly provides a range of experiences and facilities (including nippers, beach facilities, walking tracks etc.) for residents in metropolitan Sydney.
- "True" visitors: this includes all visitors who live outside of a 25km radius of the region, including domestic day trip visitors, domestic overnight visitors and international visitors. These are visitors who are included in DNSW's description of a visitor.

Destinations increasingly understand that revenue, the economic impact of tourism, is the true metric of success, not simply visitor numbers.⁴

⁴ Phocuswright White Paper, Asia-Pacific Tourism 2019: Market Trends, Opportunities and the Challenges Facing Tourism Organisations, March 2019

Visitor research

Our visitors – coming and why

Prior to the pandemic, almost 2.7 million visitors, both from within Australia and from across the globe, travelled to the Northern Beaches annually.

2019/20
Total Visitors - year

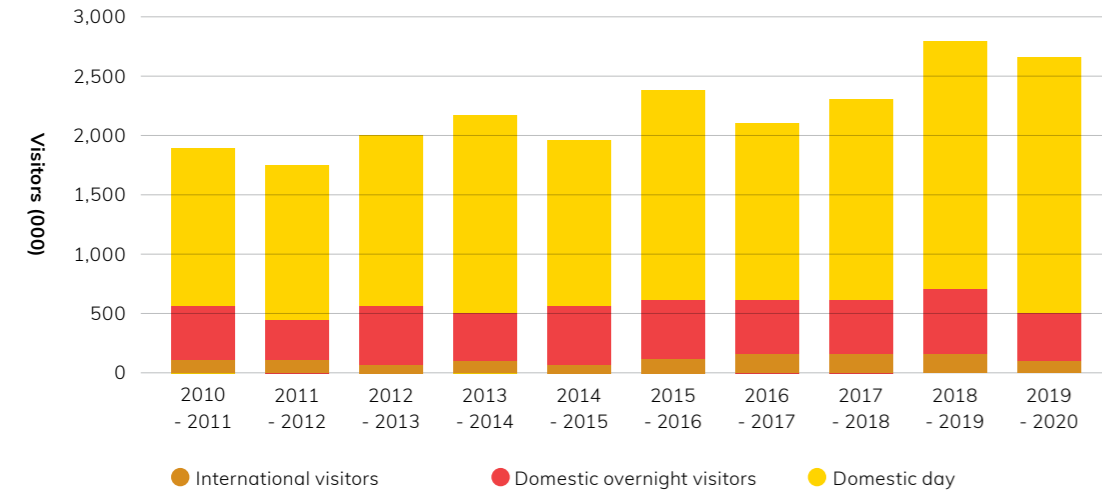
81,410
International visitors

435,587
Domestic overnight

2,174,250
Domestic day

2,691,247
Total visitors

Figure 5
Total visitors

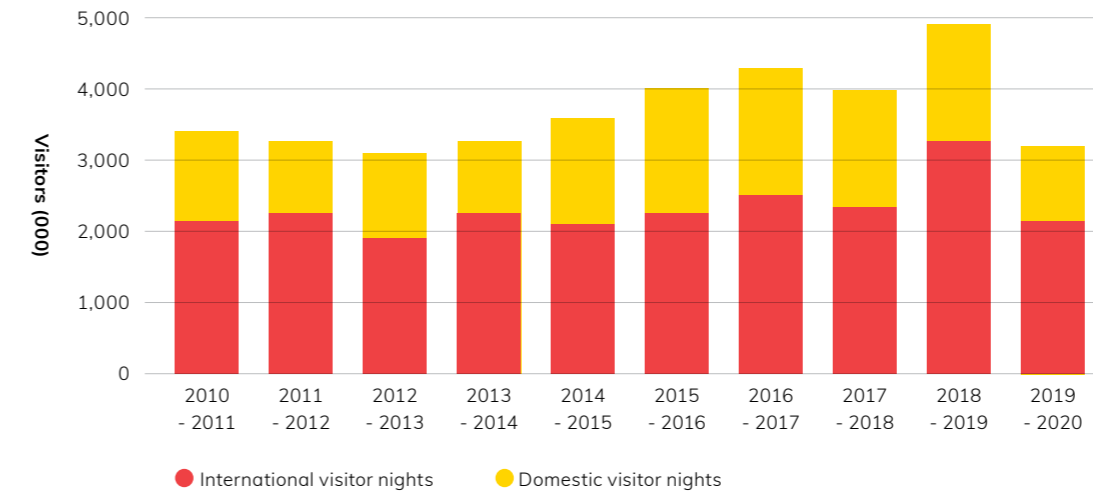


Tourism is more than holiday travel, incorporating a broader 'visitor economy' that includes domestic and international travel for business, study and work, and for Visiting Friends and Relatives (VFR).

This shows steady growth in visitor numbers across all three categories: international, domestic overnight and domestic day. However, 2019/2020 saw a decline in International visitor numbers, due to travel bans imposed March to June 2020.

Of the 2.7 million visitors, 81% are day trippers, 16% domestic overnight and 3% international overnight visitors. Due to COVID-19 without international travellers the Northern Beaches could try to increase domestic overnight stays by converting domestic day trippers to overnight stays. Whilst international visitors only account for 3% of visitor numbers, they stay much longer therefore spending much more and significantly adding to the visitor economy.

Figure 6
Visitor nights



This shows number of international visitor nights has also fallen in 2019/2020, after peaking in 2018/19.

Domestic overnight stays have also fallen since 2016/17.

*Source: TRA - <https://economy.id.com.au/northern-beaches/tourism-visitors-reason?Tourismtype=1&es=15>

Source for figure 5 & 6: <https://economy.id.com.au/northern-beaches/tourism-visitors-nights>

Reason for visiting

VFR account for the majority of domestic visitors (54%), who stay an average of 3.1 days with us.

International visitors are equally split between the reason for travel being holiday (36%) and visiting family and relatives (36%). International holiday visitors stay on average 21 days, which is longer than the NSW average. While smaller numbers international students and workers, stay substantively longer (88 and 92 days on average, respectively).

For both domestic and international visitors, VFR is a more common reason for coming here, compared to rest of NSW, and is a defining feature of Northern Beaches' tourist market.

It is worthwhile to note that prior to COVID-19, Northern Beaches welcomed approximately 300 international students attending secondary and tertiary education. These students are billeted by local families and are frequently visited by their friends and family, often as repeat visitors.

There are also a number of high-quality education institutions on the Northern Beaches that focus on tourism, events and hospitality, among other things, including the International College of Management (ICMS) and TAFE NSW and traditionally have a strong international student intake. These such courses provide employment opportunities and contribute to the vibrancy of the region's thriving villages and centres.

The closure of international and state borders would have significantly impacted on the international education market, which accounts for 5.5% of the total international visitors.

Figure 7
Reason for Travel for Domestic and International Visitors (2013/14-2017/18)*

	Visitors	Visitor Nights	% Visitors ¹	Av. Length of Stay (days) ²
Domestic				
Visiting friends and relatives	1,317,44	4,139,579	54.3%	3.1
Holiday	636,445	1,856,091	26.2%	2.9
Business	344,200	978,417	14.2%	2.8
Education	-	-	-	-
Employment	-	-	-	-
Other reason	132,695	566,839	5.5%	4.3
Total	2,426,159	7,540,927	100%	3.1
International				
Visiting friends and relatives	174,905	2,753,160	35.8%	15.7
Holiday	175,560	3,678,900	36.0%	21
Business	27,222	298,350	5.6%	11
Education	27,969	2,466,366	5.7%	88.2
Employment	13,666	1,280,909	2.8%	93.7
Other reason	68,652	1,542,227	14.1%	22.5
Total	487,977	12,019,884	100%	24.6

* Source: TRA - <https://economy.id.com.au/northern-beaches/tourism-visitors-reason>

Insights into the domestic market in 2020:
Interests, preferences, behaviour and barriers to travel

Given the likelihood of a slow recovery for international tourism, it is worthwhile reflecting on insights being identified with regard to the domestic market. Some of the top travel trends in 2020 (resulting from the COVID-19 pandemic) include⁵ :

- Slow travel, with fewer destinations visited in a trip and more time and money spend in local economies. It aligns with the increased interest in lower-impact travel and the desire to understand a place and its residents
- Offline Adventures, which responds to the interest to get into the great outdoors, disconnect and avoid crowds (and COVID-19)
- Splurge travel, in particular on high-end accommodation and more personalised and privately organised tours
- Restorative travel, which is about more than health and well-being (although that is important) as it includes a desire for more hassle-free travel options, such as all-inclusive packages or end-to-end experience from leaving home to returning feeling rested and restored.

TRA have also interrogated the data and identified some similar and additional trends resulting from COVID-19⁶ :

- There are likely to be shifts in the visitor mix as a result of the impact on household incomes and the emergence of the two-speed economy. Households with incomes of under \$150,000 are more likely to consider regional destinations while those with incomes over \$200,000 are three time more likely to stay in luxury accommodation and typically spend 80% more per person per night on domestic overnight trips.
- Impact on the level of spend is an important consideration. International holiday visitors typically stay longer and spend more per trip. This will make replacing it with demand for domestic overnight holiday visitors. The domestic traveller is also less likely to spend money on tours. However, they are more likely to spend money on experiences such as workshops and masterclasses.

- The preference of Australians to travel with family and friends is likely to see more demand for holiday home accommodation. This is being exacerbated by the perception of hygiene-related safety.
- Business travel is not anticipated to return to pre-COVID levels in the near future, with more people turning to videoconferencing.
- While an increase in demand from domestic markets may be welcomed, a key consideration will be the impact of increased visitation during peak periods (seasonal spikes). This may impact negatively on the visitor experience.

⁵ Vacaay, Future of Travel Report 2021, October 2020

⁶ Tourism Research Australia, Moving Forward: The Role of Domestic Travel in Australia's Tourism Recovery, August 2020

This visitor survey is the third in a series of annual surveys conducted by Northern Beaches Council to understand visitor trends at Manly and Palm Beach. The most recent face-to-face interviews were conducted between December 2019 and February 2020 during bushfires and prior to COVID-19 pandemic.

In all, some 679 visitor interviews were conducted (195 at Palm Beach, and 484 at Manly).

Figure 8
Origin of visitors

Palm Beach visitors predominantly came from other areas of Sydney (62%), while only 23% came from overseas. (Eight per cent each came from interstate and regional NSW.)

Meanwhile some 65% of Manly visitors were from overseas – up sharply on previous years – while 17% came from elsewhere in Sydney, 12% from interstate and 6% from regional NSW.

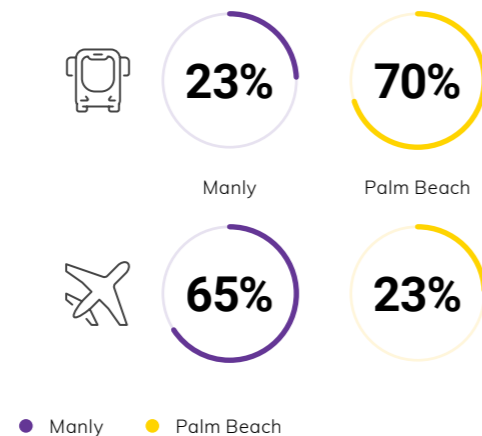


Figure 9
Visitor age over the years

Visitors tended to be older this year across both sites, with a spike (vs. previous years) in those aged 40-59 (Palm Beach) and 60-79 (Manly).

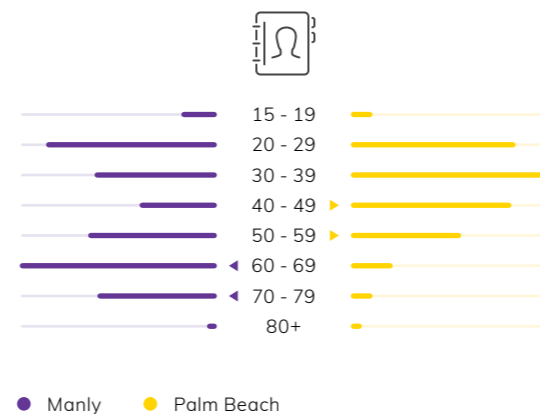
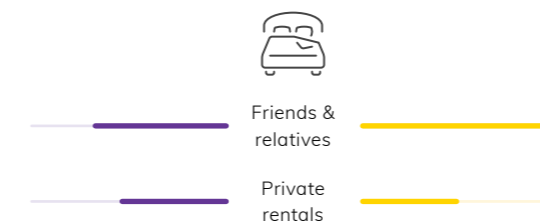


Figure 10
Where are they staying

The largest proportion of overnight visitors stayed with friends and relatives (Palm Beach 64%, Manly 37%). However private rentals (Airbnb etc.) also remained popular, at 29% and 26% respectively.



Local support

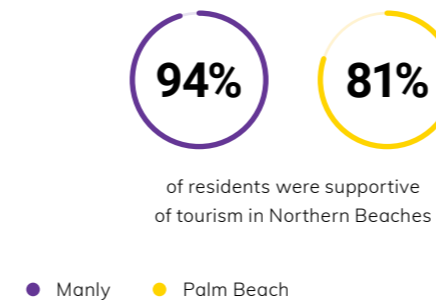


Figure 11
Reason for visit

The beach was the major attractor for visitors to both destinations (75% Palm Beach, 72% Manly), with walks also popular (Palm Beach 26%, Manly 20%).

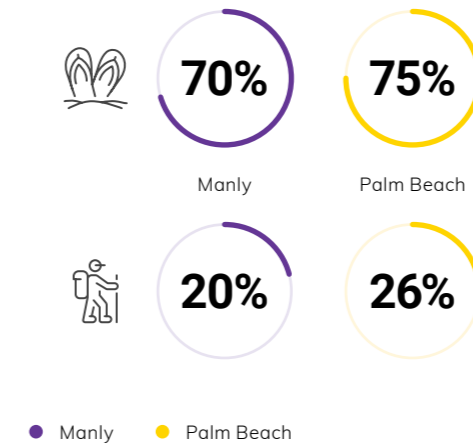


Image credit: Andrew Gregory,
Destination NSW



Product audit

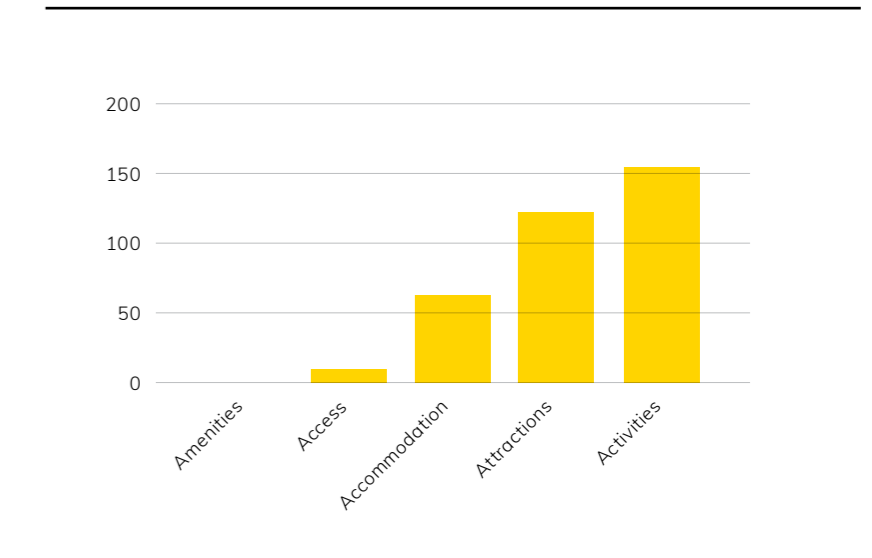
Our region has natural advantages as a tourism destination. It offers a wealth of experiences that differentiates it from other destinations, including spectacular coastal walks, nature based offerings, urban coast culture, arts and creative industries, Aboriginal culture and heritage, events and much more.

An online audit of products and experiences across the Northern Beaches has been undertaken to highlight the range of information available to prospective visitors in planning their stay. This has been obtained through what is available online (e.g. Trip Adviser and Google search), as well as products listed on the Australia Tourism Data Warehouse (ATDW).

Listings have been grouped under the five A's:

- Amenities – visitor servicing (i.e. Manly Visitor Information Centre)
- Access – travel to and within the Northern Beaches (ferries, seaplanes, bus tours)
- Accommodation – including hotels, motels, backpackers, holiday accommodation booking agents
- Attractions - galleries, breweries, dining, shopping, beaches/reserves
- Activities – surfing, sailing, golf, diving, biking, kayaking, whale watching, yoga/pilates, heritage walks, bushwalks, cooking classes

Figure 12
Tourism product audit no. of listings



Visitor accommodation is condensed into the Manly tourist precinct. Through the product audit 66 accommodation listings were identified, of which 42 were located in Manly and its surrounding suburbs. This includes major hotels such as the Novotel, Sebel and Q Station, as well as a number of serviced apartments. These hotels are critical to attracting tourism. Pre COVID-19 they were tapping into the growing b'leisure market midweek and weddings and leisure markets on the weekends. Citing 40% of occupancy midweek was from conference attendees.

At the other end of the scale, Manly offers a range of backpackers and guesthouses. However, in recent years a number of these have been converted to private dwellings, potentially restricting this visitor market. Further north along the coastline, a series of budget accommodation is also available (Avalon backpackers, Pittwater and Collaroy YHA and Sydney Lakeside Holiday Park), as well as mid-range and higher end stays such as Jonah's, Barrenjoey House, Pasadena, The Sands and Newport Mirage. There is limited formal visitor accommodation inland, with a handful or large scale hotels/conference spaces at Miramar Gardens

in Terrey Hills, Travelodge in Brookvale, Checkers Resort & Conference Centre in Terrey Hills, and Sydney Conference and Training Centre in Ingleside.

In addition to formal visitor accommodation, there has been a significant rise in the amount of 'informal' visitor accommodation with the advent of Airbnb, Booking.com, Stayz and HomeAway and many private real estate agents. There are hundreds of independent hosts, property managers, business-to-business vendors supporting the renting out of first and second homes, apartments and any other types of accommodation imaginable.

Whilst only a point in time, data from 'Inside AirBnB', identifies 4,786 listings across the Northern Beaches at December 2019, of which 80% were entire homes/apartments (i.e. un-hosted) and 20% were private rooms (i.e. hosted). By comparison, Sutherland which is a similar sized LGA, only had 468 reported listings, though Waverley with a population a quarter of that of the Northern Beaches, had a higher number of listings.

In terms of total dwelling stock, total AirBnB listings only represent around 5% of all dwellings, although this doubles to 10% for former Manly LGA area which has the highest share of listings. Former Pittwater LGA area has the smallest number of listings, but the highest average number of nights per year and estimated rate per night, reflecting its luxury visitor market.

Whilst this data does not include other short-term holidaying letting platforms, such as Stayz, it does highlight the significant role informal/shared economy accommodation plays in adding to the mix and spread of visitor accommodation across the Northern Beaches.

Figure 13

Snapshot of Air BnB listings Northern Beaches and other Sydney LGAs at December 2019

Air BnB listings (December 2019)	Average estimated rate per night	Total number of listings	Entire home/appt	Private rooms	Estimated nights per year	Estimated income per month
Pittwater	\$497	1192	1067	124	50	\$1106
Manly	\$280	1800	1359	434	41	\$718
Warringah	\$266	1794	1379	413	33	\$509
Total Northern Beaches		4786	3805	971		
Waverley	\$243	5467	3626	1758	36	\$567
Sutherland	\$201	468	345	122	78	\$984
Randwick	\$188	3346	1993	1288	35	\$445

Source: Insider AirBnB, December 2019

The NSW Government is implementing a new regulatory framework for short-term rental accommodation (STRA). This includes a state-wide planning framework, a mandatory Code of Conduct and changes to strata legislation.

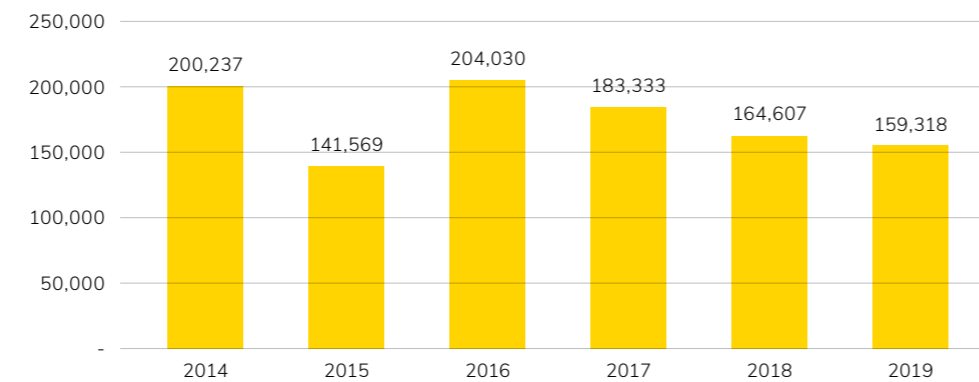
The NSW Government is also considering the introduction of a new industry-led STRA property register. The framework intends to ensure local communities enjoy the economic benefits of STRA, while managing potential adverse impacts.



The Manly Visitor Information Centre (VIC) captures Sydney day trippers and has a critical role in promoting Manly products and experiences. Being in a prime location at Manly Wharf the VIC is the first point of face to face contact for many visitors.

Figure 14

Manly Visitor Information Centre foot traffic (calendar year)



In developing Destination Northern Beaches, learnings and insights from other similar destinations have been considered in a short competitive analysis.

Competitor destinations were selected based on high-level criterion, including:

- Proximity and access to a major gateway city or CBD
- Involves an iconic site or precinct
- Strong nature-based offering and/or appeal (especially but not limited to coastal destinations)
- Appeals to higher-yield markets although not exclusively
- Clear 'peak-season'

Based on these criteria, the following destinations are considered competitor destinations:

- **Bondi Beach NSW** (Waverley Council)
- **Blue Mountains NSW** (Blue Mountains City Council)
- **Mornington Peninsula** (Mornington Peninsula Shire)
- To a lesser extent locations such as;
 - **St Kilda** (City of Port Phillip VIC)
 - **Cottesloe** (Town of Cottesloe Council WA)
 - **Pearl Beach** (Central Coast Council NSW)

In the analysis of competitor destinations, the following insights are relevant to the Northern Beaches:

- All regions except Pearl Beach, NSW had seen an increase in visitor numbers
- A common priority for all competitor destinations was to address infrastructure and services that support the visitor economy, from car parking to connectivity, including hop-on-hop-off buses through to cycling and walking trails that link sites/precincts or villages

- All of these regions want to demonstrate leadership in sustainability through to the economic viability for local businesses
- The tourism sector is in the top five economic drivers for each region. The regions adopt varying approaches to targeting higher-yield visitors
- The focus of each region varies, from marketing and promotion of the off-season, to addressing major visitor economy infrastructure projects relating to the accommodation offering and public transport linkages
- All destinations have adopted a focus on arts and culture, heritage, nature, food and drink. While these themes dominate all regions, there is a lack of compelling content to distinguish the region's competitive advantage.

Figure 15
Competitor Analysis

	Mornington Peninsula, VIC	Central Coast, NSW	Blue Mountains, NSW
Visitor #'s	YE June 2018 7.5 million	YE June 2019 6.3 million	YE December 2018 4.5 million
Key highlights	Beaches, restaurants, wineries, shopping, golf, indulgence and romance, spa, coastal scenery and festivals	Coastline, pelicans, oysters, Australian Reptile Park, horse riding, Treetops adventure, Australia Walkabout Wildlife Park & Jetpack Adventures	Three Sisters, Zigzag railway, outdoor adventure, quant towns and galleries.
Success factors	Majority of visitors 47% visit to the Southern Peninsula. Visitors most strongly associate the region with beaches, restaurants, wineries, VFR, shopping, golf, indulgence & romance, spa, coastal scenery, cinema, parks & gardens and festivals. (Roy Morgan Research (2011))	Central Coast Stadium capacity 20,000 - hosting of major sporting events	* Hop on- Hop off bus operates (Blue Mountains Explorer Bus) * UNESCO WHS
Resident #'s	Mornington Peninsula 289,142	Central Coast 327,736 Pearl Beach 536	Blue Mountains 306,933 Katoomba 7,964

Cottesloe Perth, WA	Northern Beaches	Bondi, Waverley NSW	St Kilda, VIC
YE 15/16/17 annual average Perth area 4 million	YE 2019 2.69 million	YE March 2018 2.8 million	YE Dec 2017, estimated visitors to St Kilda 1.95 million
Cottesloe Beach is about half-way between Perth and Fremantle, and is accessible via car or train in less than 30 mins from both cities. Sculpture by the Sea (16 years running), dining, beach activities & a bush to beach trail	An abundance of natural bushland and natural assets such as North Head Sanctuary, Cabbage Tree Bay, Shelly Beach, Pittwater and many other beaches. Manly, Palm Beach Lighthouse, Coast Walk,	World famous Bondi Beach, Coastal Walk, beachside cafes and restaurants.	St Kilda is home Luna Park, St Kilda Pier, the Esplanade Hotel, Acland Street and Fitzroy Street.
* Perth's most photographed beaches Cottesloe's Sculpture by the Sea - highlights impact of this event esp off peak	Taste of Manly and Manly Jazz festival Trip Advisors 2017 & 2018 Traveller's Choice awards Manly Australia's best beach Sporting events such as VISSLA, Sun Run & Cole Classic	* Sculpture by the Sea * Three-day urban coastal walk: Bondi to Coogee Coastal Walk * City2Surf * TV series - Bondi Rescue * NYE	St Kilda beach Melbourne's most famous beach, Luna Park & several renowned streets and festivals.
Greater Perth 1,907,833 Cottesloe 7,375	Northern Beaches 252,878 Manly 80,327 Palm Beach 1,593	Waverly 66,812 Bondi 10,045	Greater Melb 4,485,211 St Kilda 26,124



Strategic approach

Northern Beaches target markets

The first step in defining target markets is to identify the goal and high-level objectives for the direction of the visitor economy, as outlined above.

Key to achieving economic value is to identify potential customers and understand what motivates them. As a result of thorough analysis of visitor research, relevant global trends in tourism, consultation insights as well as the above influences, the following target markets have been identified for the Northern Beaches:

- Active 55+;
- Contemporary women travellers
- Visiting Friends & Relatives (VFR)
- Business travel and raising awareness and appeal of the Northern Beaches for hosting smaller-scale, boutique or bespoke conferences and events.

Figure 16
Primary target markets for the Northern Beaches

Active 55+	Contemporary female travellers	Visiting friends and relatives (VFR)	Business travel
<p>55+ choosing to travel earlier than retirement to enjoy active or immersive experiences.</p> <p>Globally, this market has the highest disposable income. They are seeking new destinations to add to their bucket list and are travelling within Australia as well as overseas.</p> <p>They want to feel part of the 'local scene', are physically active and want to be perceived as being 'young at heart.'</p> <p>They are looking for short break escapes and often choose to travel outside of peak periods to avoid crowds.</p>	<p>Increasing number of contemporary female travellers who are more likely to have a higher disposable income and will travel either on their own or in small groups of friends.</p> <p>They are key influencers in family travel.</p> <p>This market is seeking new experiences that immerse them into the destination and local culture.</p> <p>Health, wellbeing, arts and culture are important influences.</p>	<p>VFR continues to be an important reason for travel, both domestically and internationally.</p> <p>Increasingly, the VFR market is choosing to stay in commercial accommodation, participate in local tours, activities and experiences and will often travel outside of peak periods to immerse themselves in the destination.</p> <p>It is important to market to the host (local residents) to more effectively reach the VFR market.</p>	<p>Highly relevant trends relating to business travel are:</p> <p>Renewed interest in face-to-face meetings, especially for small and medium-sized enterprises (SME).</p> <p>Extending business trips for leisure, 'b-leisure' is trending with young business travellers (25 –34 year olds).</p> <p>Influences on length of stay include destination appeal and vibrancy, quality of food, experience offerings, health and well-being.</p> <p>Offers by hotel loyalty programs.</p>

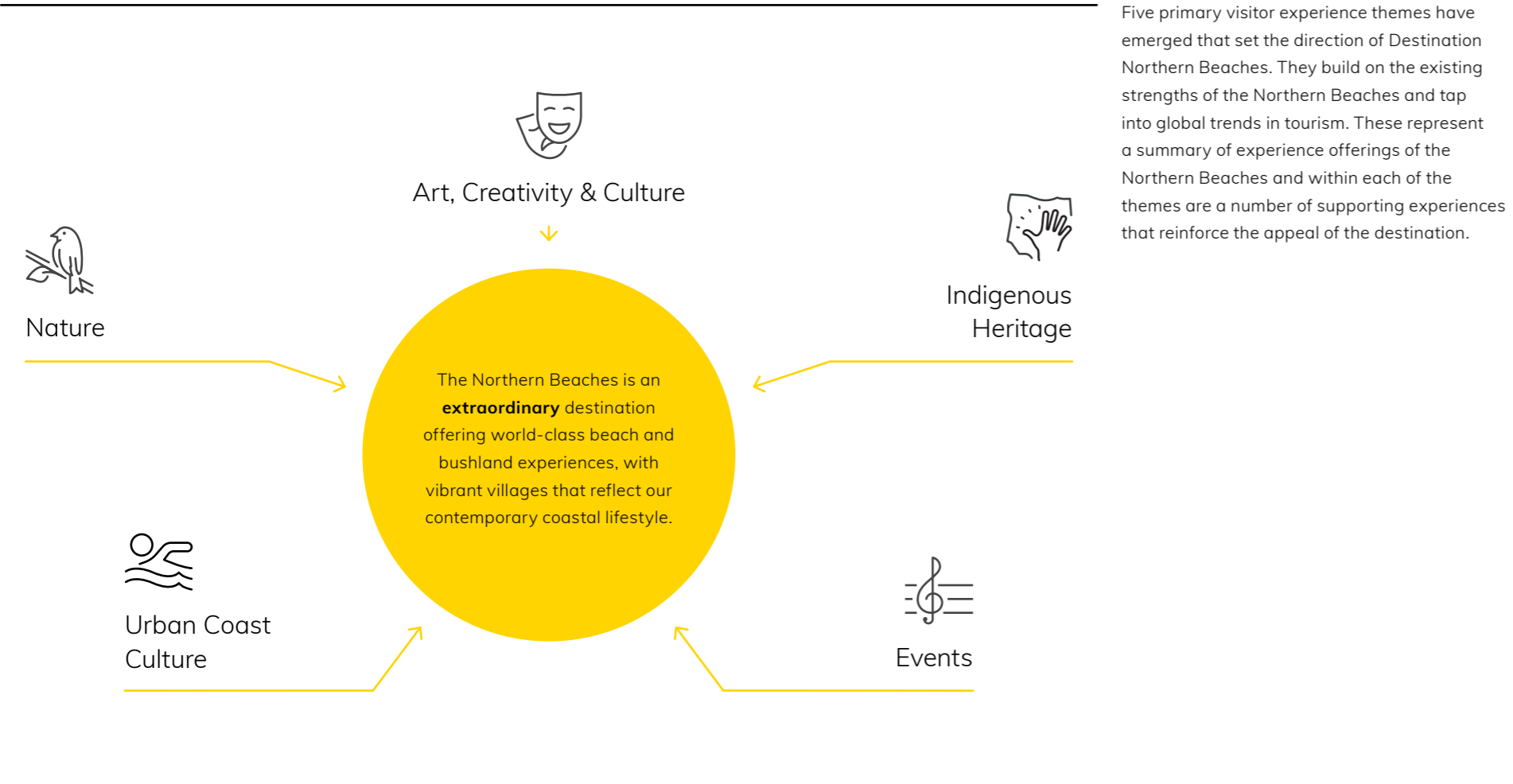
- **Wellbeing** is a major growth sector with the market seeking destinations and experiences that promote active and healthy lifestyles or moments of serendipity; it is more holistic than a 'day-spa moment'. The opportunity is to tap into the market's desire to maintain their wellbeing while travelling. It relies on open space, physical connectivity, directional signage and itinerary development.*
- **Quality food and service**, especially in an up-market setting is increasingly important to the perception of the destination. Northern Beaches offers a number of settings where this trend should be further developed or promoted.
- **New luxury** is highly sought after for genuine engagement and interaction with local people, nature, heritage and arts and culture. The story of the place, its people is increasingly critical to the success of the experience, from artists and artisans to local sporting heroes or venues. A key to success is to consider the opportunities for more intimate or boutique experiences, from small-scale events to immersive and personalised tours.
- **Sustainable and socially responsible** destinations and experiences appeal to broader audiences especially in a time following the COVID-19 pandemic. Initiatives such as the COVID Safe Summer Guide and Action Plan for Outdoor Public Places, encouraging community and businesses to reduce single use plastics and facilities such as the Coastal Environment Centres which demonstrate and profile a commitment to education and sustainability.
- **Transformative travel** is a key growth market. This is about creating or facilitating memorable moments that are influenced by factors such as food, arts, culture and entertainment.
- **Events** from festivals to local markets are a significant drawcard for attracting visitors as well as business travellers. The 'festivalisation' of meetings and events will continue; festivals and local events add to the excitement of a destination and its appeal to conference organisers.
- **Personalisation and curation** is important to travellers who want to feel welcomed regardless of their ethnicity and religion. Increasingly, the market is curating their own experience and sharing it with their friends and peer groups promoting accessibility for travellers.

See Skift Report: <http://skift.com/2019/06/12/how-travel-brands-are-getting-wellness-right/>

Domestic and international overnight business visitors spend an average **\$222 per night in NSW** - nearly double that of overnight leisure visitors.

Source: Destination NSW (IVS/NVS for YE March 2020)

Figure 17
Northern Beaches experience framework



Five primary visitor experience themes have emerged that set the direction of Destination Northern Beaches. They build on the existing strengths of the Northern Beaches and tap into global trends in tourism. These represent a summary of experience offerings of the Northern Beaches and within each of the themes are a number of supporting experiences that reinforce the appeal of the destination.



Urban Coast Culture experience

This experience reflects the values and lifestyle our community embraces. It has helped shape the villages and vibrant places across our region. At its core is the collaborative and welcoming sense of community on the Northern Beaches. **This theme is what makes our destination both highly appealing to visitors from around Australia and abroad.**



Legend

-  Popular lookouts
-  View corridor
-  Locally famous surf breaks
-  Surfing reserves
-  Coast walk
-  Bondi to Manly walk

Northern Beaches Coast Walk

This iconic walking trail stretching 36km along our breathtaking coastline from Manly to Palm Beach showcases our extraordinary coastal environment through a celebration of art and culture. The area is abundant with pristine beaches, stunning headlands, clifftop bushland and wildlife and is rich in stories of environmental, Indigenous and historical significance. The Coast Walk will provide an enormous opportunity to spread visitation along the coastline and into town and village centres. It can be enjoyed in short sections or completed over a number of days, either staying overnight at different accommodation en-route or within easy access to return seaplane journey from Palm Beach or via the ferry from Manly to Circular Quay. It also links up to the Bondi to Manly 80km walk.

Creating extraordinary gateways to the Northern Beaches

Manly and Palm Beach each with its own character and experience offering, are both extremely popular destinations for different visitor markets. The two gateways, both of which include access from the land and the sea, are currently seen as standalone hubs, but in an integrated destination, they would complement one another.

Manly

A popular destination since the 1900s, millions of tourists seek out the ocean beach from the ferry, enjoying retail stores, dining experiences and entertainment. With increasing competition in recent years, the Corso has seen a significant change in the retail sector and an increasing demand for the laneways and pedestrian paths to be activated day and night.

It will be important to encourage greater visitor dispersal and discovery of the area via public transport connections out of Manly and up the Northern Beaches. Potential for a Manly to Brookvale Bus Rapid Transit as identified in the Local Strategic Planning Statement (LSPS) and opportunities for bike share schemes, especially use of e-bikes in various precincts.

Early 2022 will see the release of a Manly Place Plan which will include a focus on tourism, local and night time economy, street activation, recreation, signage, way finding, key pedestrian movement corridors, public amenity and arts and creativity.

Palm Beach

An extremely popular destination for its natural beauty, it is famed for its association with the long running TV series, Home and Away. Governor Phillip Park is the entry point to Barrenjoey Lighthouse and home to popular golf course, restaurants, boat hire and is the arrival and departure point for the iconic seaplanes. The main wharf at Pittwater Park provides access for recreational, commuter and commercial vessels and is an important exchange point for people accessing the western foreshore and areas such as The Basin, Ku-ring-gai Chase National Park, the Hawkesbury and Central Coast.

2021 will see an updated Governor Philip Park Plan of Management (POM) to ensure we conserve and enhance the Park's natural, historical and cultural values while providing a diverse range of recreational opportunities. With the addition of Northern Beaches Coast Walk, new signage and wayfinding for pedestrian movements will be key to the visitor experience.



Celebrate the surf culture

A strong link along the coastline lies in the surfing history and stories that could be expressed in activities, art, surf themed sculptures, artworks, imagery and innovation. Celebrating these stories offers an opportunity to create new experiences that can position the Northern Beaches in line with competitor destinations, and differentiate unique parts of the destination through innovation in the experiences offered.

Enhance visitor experience at Sydney Lakeside Holiday Park, North Narrabeen

Operating since 1913 and located on the foreshore of Narrabeen Lagoon and North Narrabeen Beach, the holiday park has 77 cabins and 250 camping sites attracting both near and far visitors. It provides a fantastic opportunity for active families and visitors to enjoy the spectacular waterways and nature of the Northern Beaches. With the Coastal Environment Centre, and Coast Walk on its doorstep, there are opportunities to collaborate on experience-based itineraries and with local tour operators to develop the overall visitor experience. The holiday park is run and promoted through NRMA and is a key requirement for Council to continue to invest in and promote this tourism asset.

Image credit:
Andrew Gregory, Destination NSW





Nature experience

Surrounded by bushland and waterways and home to some of Australia and the world's most iconic wildlife, this is what makes the Northern Beaches such a beautiful place to live, work, study or visit.

Nature contributes to our health and wellbeing as well as providing the setting for extraordinary experiences, all on the doorstep of Australia's largest city. This provides a unique opportunity to showcase the qualities that motivate and attract people from around the world to visit Australia.

Waterways - Celebrating and connecting the waterways of the Northern Beaches

The waterways of the Northern Beaches are one of our greatest strengths of the region. These waterways are habitats that support an incredible diversity of wildlife, including a number of threatened species. While access needs to be carefully managed to ensure that the environmental and aesthetic values of these special places is not adversely impacted, there are opportunities to profile and highlight the waterways as a point of distinction of the region and support visitation. Council has developed a draft Pittwater Waterway Strategy 2038, which recognises these values and provides an effective plan to manage the balance between conservation, protection and sustainable use and enjoyment of Pittwater.

Best of nature accommodation

While there is a good selection and quantity of accommodation servicing the Northern Beaches (including commercial properties and short term letting properties), there is limited experiential accommodation that takes advantage of, and celebrates, the distinctive natural environment of the area.

Examples could include eco-accommodation close to the sea, pop-up accommodation such as safari-style tents and use of sites within the LGA.

The Northern Beaches waterways are popular for boating access, and Pittwater offers world-class opportunities for boating accommodation (boat hire and charters). These types of accommodation experiences assist in complementing the positioning of the region for its natural assets.

First ever Urban Night Sky Park at Palm Beach and Ku-ring-gai Chase National Park

There are locations on the Northern Beaches where viewing the night sky is particularly rewarding, such as Terrey Hills and Palm Beach Headland. Council is proposing to apply to designate this headland as an Urban Night Sky Place with the International Dark Sky Association (IDSA). There are opportunities to encourage developing experiential itineraries, small scale events and night-time tours to view the night sky. This could include Aboriginal cultural tours to share an Aboriginal interpretation of the night sky and a bush tucker experience.

The proposal is being put forward so that we can showcase how good lighting can light roads and pathways for safety, and continue to support the local economy such as the cafes and restaurants.

Coast nature walk and water series

Ku-ring-gai Chase National Park has an abundance of trail walks. However, there is a gap for multi-day coastal walks similar to New Zealand's Queen Charlotte Sounds Walk. Suggestions include multi-day adventure experiences, loop walks, water-based activities with overnight accommodation, for example linking current walking trails to accommodation options such as the Basin and Currawong Beach Cottages.

Off-road cycling

Off-road cycling is a growing market within the nature-based tourism sector and this niche is rapidly growing in popularity. It can be an ecologically sustainable tourism experience which encompasses, social and recreational riding, touring, competition, cycling festivals and spectator events. It reaps huge health and social benefits from getting out and about in the fresh air.

Northern Beaches residents and visitors participate in a broad spectrum of riding disciplines ranging from cross country and gravity trails, to BMX, dirt jumps and pump tracks. The Northern Beaches boasts designated trails and facilities at a number of locations for off-cycling enthusiasts who seek a safe and enjoyable bush cycling experience. A key concern to these enthusiasts and other community members is knowing that Council is managing the potential environmental and biodiversity impacts on these locations as well as where there are unauthorised trails.

As part of the development of the Open Space and Recreation Strategy, Council will be analysing key trends in off-road cycling, current provision and future requirements of this sport on the Northern Beaches. The project will consider all disciplines, all ages and all stages to help inform Council's decision making and involves consultation with riders to better understand and accommodate their needs.

Manly Dam

This 377 hectare reserve Manly Warringah War Memorial State Park - known as Manly Dam, has a wonderful diversity of flora and fauna, including a number of threatened species. The area attracts a lot of wildlife, including some very friendly black swans, a variety of ducks and other birds, goannas, lizards and many more. It's great for picnics by the water, renowned for mountain biking and water skiing, and its network of bush tracks are perfect for exploring. Once the water reservoir for Manly, it has been a recreational park since WWII. This beautiful bushland area is hidden away from the crowds, nestled between Manly Vale, Allambie and North Balgowlah. Now one of Sydney's best mountain biking tracks is enjoyed by beginners to advanced riders and the Manly Dam Heritage Walk, which is 7.3km in length goes around the lake gives the Northern Beaches potential to diversify the nature offering which is so close to the Sydney CBD.

Currawong Beach Cottages

Currawong Beach Cottages on Pittwater is a Northern Beaches rustic holiday experience accessible only via Palm Beach ferry. Nestled on the fringe of the Ku-ring-gai Chase National Park, this secluded beach location has been a holiday haven for Sydney locals for decades. It is a perfect place to host a retreat, ideal for writers, artists as it is a place of peace and tranquillity, the natural beauty all around make this a truly inspiring environment.

Council will continue to protect and enhance the natural and built environments along with the Currawong State Park Advisory Committee's vision for Currawong to be 'A unique and natural environment that is shared and experienced by everyone'.



Art, Creativity and Culture

Arts and Creativity is a core strength of the Northern Beaches, whether it be in industry or the arts, the region continues to create and innovate. **This theme explores the opportunities to strengthen and support the Arts and Creativity Strategy** along with local artists, artisans and innovative industries, **contributing to thriving villages and vibrant centres.**

Arts and Creativity is an essential element of the Northern Beaches bringing to life the other themes through arts and creative expression, from live performances, the creative industries, theatre, street art and education facilities. The Coast Walk Public Art Strategic Plan and Weaving Bridges project are some examples of how this can be achieved in celebrating local identity and creating a culturally rich visitor experience.

The Northern Beaches Arts and Creativity Strategy Connected through Creativity 2029, received a Highly Commended in the 2020 LGNSW Leo Kelly OAM Arts and Culture Awards. Connected through Creativity 2029, set's out our community's commitment to supporting and growing a vibrant creative culture, authentic to the Northern Beaches. The Strategy presents three outcome areas supported by nine strategies to cultivate creativity, identify opportunities for arts and cultural expression and connect our diverse communities.

Coast Walk Public Art Trail

The Coast Walk is a once in a lifetime opportunity and as part this the Aboriginal Art and Storytelling Project will showcase temporary and permanent art activations and installations along the walk. Works that will reflect Aboriginal, environmental and cultural stories will enrich the experience for locals and visitors, contributing flow-on benefits for our local economy.

Manly Art Gallery & Museum

The MAG&M is one of the top arts and cultural experiences on the Northern Beaches. Since 1930, MAG&M has been presenting leading exhibition programs and providing opportunities for contemporary artists to present, develop their practice and audience. The history of artists visiting the Northern Beaches for inspiration goes back to the 1800's and how MAGM came to be. MAG&M is a thriving hub of creativity, that always exceeds expectations, with artist talks, kids workshops and volunteer opportunities, Manly Art Gallery & Museum is the cultural heartbeat of Manly, loved by locals and visitors and respected by its peers. Of all visitors 33% of them are from out of the area and a large component of them are international visitors.

Creative Space at North Curl Curl

A venue which provides affordable exhibition and studio space drawing local emerging artists to come together, explore and realise creative potential.

Glen Street Theatre

Our most enduring performing arts centre, Glen Street Theatre has been captivating audiences since 1973 through presenting a stellar line-up of theatre productions and concerts from many of Australia's major performing arts companies. Productions have included performances by such celebrated actors as Jonathan Biggins, Jacki Weaver and Barry Otto to name just a few.

North Head

The North Head precinct is an exceptional setting and opportunity for the region. With amazing views, cultural heritage, artist studios and art installations. It is easily accessible in a number of ways from Manly village and it offers a 'stage' for extraordinary experiences linked across the range of tenure (Council, NPWS and SHFT).

Artist retreats, masterclasses, workshops and immersive experiences

Creative tourism is a growing area of interest for contemporary female travellers, millennials and 55+. Engaging local creative industries is an excellent way to grow brand awareness and create content and economic growth for the region. With the diverse stories that underpin the Northern Beaches, there are a number of creative art offerings including overnight artist retreats, specialised workshops, arts education, boutique business events and experiences that engage local artisans and innovative industry leaders. There is the potential to create bookable experiences (weekends) and content that uncovers and gets 'under the hood' of the destination.



Indigenous Heritage

Indigenous Heritage acknowledges the connection of Aboriginal people to the Northern Beaches while also reflecting on the region's more recent history. It offers an opportunity to experience heritage that is reflected in the beauty and significance of rock art and engravings along with extraordinary stories of the connection of Aboriginal people to Country. These experiences offer new perspectives and insights that help to shape a respectful and vibrant shared future.

Aboriginal cultural tourism experiences are on the rise, particularly with higher-yield markets. Integrating Aboriginal stories, language and heritage coupled with the extraordinary sites of significance, including rock art and engravings across the Northern Beaches, is an opportunity to support the development of Aboriginal cultural experiences delivered by local Aboriginal people. In addition, there is an opportunity for improved interpretation of Aboriginal cultural heritage of the region, which would require the involvement and guidance of organisations such as the Metropolitan Land Council and the Aboriginal Heritage Office.

Self-Guided Urban Walks

Engaging visitors with self-guided day adventures would highlight the vast array of unique art, cultural and heritage experiences to be had including studio trails, food trails, heritage walks, art and music events.

Manly West Esplanade

Manly West Esplanade has a rich history spanning thousands of years. The traditional owners are generally considered to be the Gayamaygal (Kai'yamaygal) people.

West Esplanade's high exposure to visitors presents an opportunity to educate them on the aboriginal heritage of Manly Cove. This could be via implementing the Manly West Heritage Activation Plan.



Events experience

Events contribute to a more **vibrant community and help bring to life the stories and lifestyle of the Northern Beaches** that excite and entice visitors from across Australia and around the world. While each of the other themes are supported by local and community-based events, **this theme is about those events that put the Northern Beaches on the must-visit destination bucket list.**

Multiple live site festivals and events

Pre COVID-19 Northern Beaches hosted a broad range of events and festivals such as the Manly Jazz Festival, Taste of Manly, Sydney Surf Pro as well as many community festivals and events across the LGA.

Events can play a critical role in activating the destination in the low peak and shoulder periods, as well as the night-time economy. Events provide the opportunity to emphasise or highlight key experience themes and strengths of the LGA, including sporting events, revitalising the live music scene and infusing arts and creativity into event delivery.

The opportunity exists to introduce new brand aligned events, as well as extend existing ones to other parts the Northern Beaches, leveraging current successes. This could be done in a way to activate multiple live sites across the LGA, offering a number of opportunities for the community and visitors to the Northern Beaches to experience the event in a smaller scale.

Sports and recreation tourism

The Northern Beaches has an opportunity to leverage its sporting and recreational setting, facilities and reputation. Specifically, those relating to:

- Water sports, including surfing, sailing and kayaking
- Mountain biking and cycling
- Hiking, bush walking, exploring
- Tennis, golf and various football codes

Key considerations include:

- Leverage the positioning of the region by supporting and promoting sporting events that highlight the appeal of the region or profile specific experiences e.g. surfing and sailing.

- Support sports that already have strong community interest to attract and host regional, state or national events. This may include funding or in-kind contributions towards 'hosting bids' to sporting associations. There would need to be careful coordination between several partners such as the hospitality sector to ensure a range of accommodation is available, restaurants and shops are open, and basic services will be in place to maximise the benefits of hosting the event, including enhancing the perception of the region as a leisure destination.

Develop itineraries and promote experiences and activities that encourage sporting event participants to either bring friends or family with them and/or extend their length of stay. However, the offer must match the motivations and expectations of the target market of the event. Furthermore, it should be promoted well in advance of the event, and in partnership with the event organiser and sporting club/association.



Food and beverage events

Work with local food and beverage operators to promote the diverse food offering on the Northern Beaches. This includes profiling food and beverage events such as a local brewery trail or an award winning chef dining experience. Explore opportunities to package tours and experiences for visitors to sample food and beverage offering across the region.

Image credit:
Destination NSW





Delivering the plan



Along with addressing the goals and the five experience themes above, there are an additional four key deliverables to realise the destination potential.

- **Tourism industry development**
- **Partnerships**
- **Marketing and promotion**
- **Measuring success**

Tourism industry development

Northern Beaches accommodation and food is the sixth largest employing sector in the area and accounts for 12 percent of all our jobs. Many of these jobs employ locals.

Empowering these businesses to help understand the visitor economy and tourism trends will be a key initiative of Council. Engaging a range of professional development activities, participating in industry forums, learning how to work across government agencies and the importance of having export ready products can align and strengthen this business sector.

A range of recommended actions for Council, industry and Government can build industry capacity and assist in developing the visitor economy on the Northern Beaches through learnings about market trends, and improvements in the delivery of quality services, products and experiences.

A range of measures are recommended that aim to:

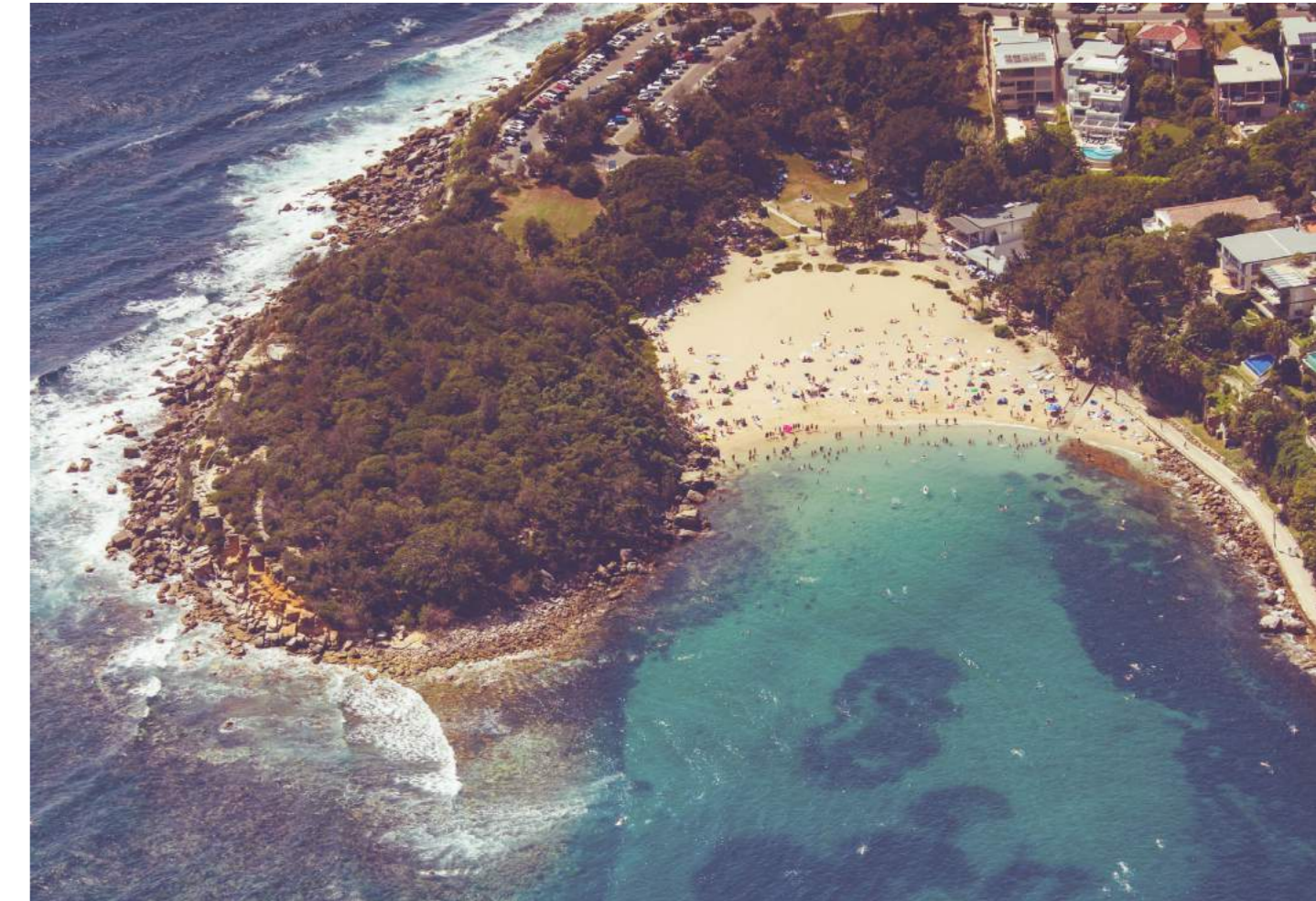
- Strengthen the Northern Beaches tourism industry network and develop an understanding of the visitor economy to foster new opportunities for growth
- Encourage Northern Beaches tourism industry to be more actively involved in their industry
- Incentivise strong leadership and continued innovation within the region
- Help develop and grow the experiences and products offered, including packaging of products and services.

- Access existing resources within Council and State Government to provide assistance. These include:
 - Destination NSW resources, including NSW First and Get Connected. A workshop program supporting businesses to develop, promote and sell their tourism products
 - Regional Tourism Product Development. Actively working to apply for grant funding for eligible programs within the Northern Beaches on product development aligned to this plan
 - Export Ready. Understanding international marketing and getting business export ready.
- Recognise and promote excellence in the industry within the Northern Beaches, and provide a means by which businesses can enter awards as well as measuring their business performance.

Image credit:
Destination NSW

Providing incentive to industry to continue to develop, grow, lead and innovate will position the Northern Beaches well with NSW Department of Planning, Industry and Environment (Industry NSW), recognising that the history of the Northern Beaches is one of innovation and inspiration. Developing an annual scholarship for businesses within the Northern Beaches is an important way of growing the leadership skills for the future.

Encourage local businesses to participate in industry awards, where the industry celebrates success across the Northern Beaches and could provide a means not only by which industry celebrates success, but also benchmarks itself.



Tourism industry model

Effective governance and leadership in tourism is essential to enable the industry to work together with a common goal and approach, and to use resources available for marketing, product development and capacity improvement.

Figure 18
SWOT Tourism industry model

Strengths	Weaknesses	Opportunities	Threats
<ul style="list-style-type: none"> The Northern Beaches has a functioning and respected tourism industry Range of experiences are world-class The coastline is world-famous Council and industry would like to work more effectively Destination Northern Beaches provides a uniting point for collaboration and strategic direction 	<ul style="list-style-type: none"> Travel packaging is not common No regular forum for businesses to come together Industry partnerships with Council primarily rely on the Strategic Reference Group Limited ways for Council to engage with industry on issues and opportunities 	<ul style="list-style-type: none"> Establish a united industry body that provides leadership for the Northern Beaches industry Collective marketing, product development and packaging United industry working with partners including the State Government to maximise opportunities 	<ul style="list-style-type: none"> Lose of opportunities as there is no unity in the industry If external or internal shocks occur, there is no industry body to respond rapidly and effectively United industry working with partners including the State Government to maximise opportunities

The absence of an industry body is the most pressing action required to improve governance on the Northern Beaches. It is proposed to develop such an organisation over time as follows:

- Year 1** - Council undertake tourism activities with an industry-based Board.
- Years 2 to 3** - Consider the set-up of an incorporated tourism organisation with industry representation. The organisation would be funded through Council support and industry membership (on a sliding scale).
- Year 4** - Council would offer funding and sit on the Board. However, the funding of the organisation would come from industry, grants and commissions – presenting opportunities for cooperative marketing campaigns and other industry priorities.

A future Northern Beaches Tourism and Hospitality Industry Organisation, would:

- Provide leadership for the local tourism and hospitality sectors and collaborate with Council to provide a framework enabling industry to develop, promote and service the visitor economy of the Northern Beaches.
- Be primarily responsible for the marketing and sustainable tourism development for the broader Northern Beaches region through working with state government and collaborating with local government, the business sector and the broader community.

Local Government would:

- Be responsible for strategic oversight of sustainable tourism and economic development including infrastructure, visitor services including visitor safety, development and investment attraction.
- Work closely with the association to maintain a strong partnership with industry and provide the necessary leadership to strengthen the sector.

Partnerships

Developing partnerships with other land managers, providers, government agencies and the private sector will help ensure a seamless experience is delivered to visitors. This in turn helps deliver improved destination performance.

North Head and other areas within the Northern Beaches contain a complex set of underpinning land tenures. Developing strong working relationships with agencies that play a big role in providing visitor services is critical. These include:

- NSW Department of Planning, Industry and Environment (National Parks and Wildlife Service).
- Harbour Trust (formally Sydney Harbour Federation Trust).
- Roads and Maritime Services – management of the waterways and many of the important wharves, jetties and ferry terminals essential to the Northern Beaches visitor and community access.

- Neighbouring Council areas – essential for developing seamless transport connections, connected walks and other experiences.
- It is also critical to forge effective partnerships with the Metropolitan Local Aboriginal Land Council and Aboriginal community members to assist and realise their aspirations for tourism and to ensure protection and celebration of their culture.

In addition to land managers, a range of other institutions within the Northern Beaches offer strategic partnerships aligned to the visitor economy growth. These include chambers of commerce, educational institutions such as ICMS, TAFE NSW, arts and culture organisations and other industry sectors that provide vital services to visitors.

Tourism Australia is responsible for international marketing of Australia and national tourism strategies.

AUSTRADE's role in Australia's tourism industry is to develop policy, attract investment and provide research to grow Australia's tourism market share.

NSW Department of Planning, Industry and Environment (Industry NSW) - Supports the growth and advancement of industries to attract investment, increase trade and create jobs.

Destination NSW is the lead government agency for the New South Wales tourism and major events sectors. In supporting NSW regional and local tourism organisations, DNSW offer a number of resources and opportunities for industry to develop, promote and sell great tourism experiences.

Northern Beaches is within the Sydney metro area along with City of Sydney, Waverley, Randwick, Penrith, Camden, Campbelltown, Blacktown etc.

The Blue Mountains, Central Coast, Wollongong etc. reside under "regional destinations" of NSW.

Image credit:
Destination NSW



It seems almost quaint to think that, not too long ago, the job of tourism boards and destination marketers could be described so simply: Get more people to visit your destination. In an age where local residents from Barcelona and Venice to Boracay Island are protesting tourism itself, measuring success by swelling visitor numbers no longer feels relevant. The holy grail of a sustainable yet lucrative tourism industry has, by definition, come to mean tourism that local residents and stakeholders feel good about too.

The most important marketing task is to attract the right visitor at the right time, finding ways to grow visitor spend without increasing the total number of visitors. In short, this requires visitors to stay longer, disperse further and spend more.

In this section, initiatives to strengthen demand have been identified.

Having identified the target markets to connect with, there are critical areas to address:

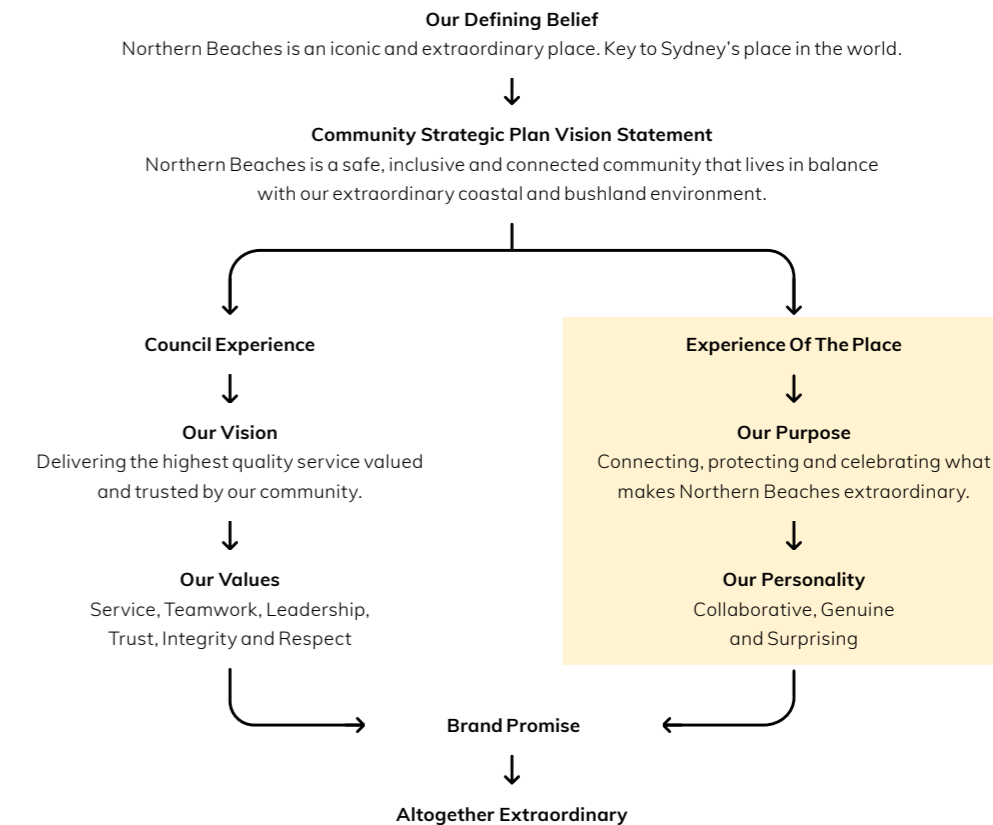
- Developing the destination's brand identity. One voice: Drive consistency in the Northern Beaches identity across all channels
- Focus marketing efforts on the local community and VFR as well as higher-yield markets
- Create remarkable content for use in and to enrich the VFR and higher-yield market campaigns

- Implement campaigns to target mid-week, shoulder and low season travel and encourage short-break getaways
- Identifying the best channels to reach and communicate with the target markets
- Utilise influencers as well as in-destination ambassadors or specialists/experts to profile key experiences to create bespoke itineraries, especially focused on high-priority themes and special interest markets such as wellness experiences, going beyond the beach, hidden gems, and the best for each season (a place for all seasons)
- Invest in visitor interactions at each touch point; pre, during, and post-visit.

Destination brand identity
A destination's brand identity is the sum of all the stories about the destination and the experiences they have during a visit. In other words, a destination's brand identity is a perception of 'place' that lives in the minds of visitors. A priority is to shape that perception and differentiate the destination from its competitors.

Place brand logo
This version consists of the wave symbol and two line wordmark. The word 'council' is removed. It also exists in stacked and horizontal formats. As a general rule, we use it on applications where we celebrate and communicate a sense of place.

Figure 19
Brand hierarchy



Place brand horizontal and stacked logo



Visitor servicing

Visitor servicing is defined by the sum of all visitor interactions with a region and its products and experiences, including:

- Pre-visit (information and inspiration)
- In destination (in-trip discovery)
- Post visit (reviews and advocacy).

Implement mobile visitor information services to reach visitors where they are, especially during peak seasons and events. This requires a programmed or scheduled approach that enables flexibility for unanticipated demand, major or natural events (such as bushfires and COVID-19) and weather conditions.

Reform digital distribution of information for visitors, including through an easy to use and find destination website that services the entire region. This will need to integrate tourism-focused social media pages.

Create and increase distribution of simple and compelling content to encourage regional dispersal and raise awareness of COVID-safe things to see and do. An example is to address key challenges for visitors during peak periods (e.g. parking during summer holidays along the beaches and Manly).

Whilst there is also a need for an online presence for marketing and promoting visitation, the extensive numbers of domestic and international visitors who travel through Circular Quay to Manly, highlights the need to have an active presence there. The Manly Visitor Information Centre captures these 'in destination' travellers and is a busy centre answering questions on popular walks, activities, restaurants and offers a daily History and Heritage Tour. The team works closely with local operators and other visitor information centres around Sydney helping to drive visitation to the Northern Beaches.

Measuring success

Measuring performance of the visitor economy in the Northern Beaches Council LGA is critical to understanding the success of implementing the plan.

It is important to annually monitor key visitor markets, including total visitors, visitor nights (total and by key markets) and spend per person. This data is provided by Tourism Research Australia (TRA), through its International Visitor Survey (IVS) and National Visitor Survey (NVS) provides visitor data to industry and destinations. In addition, DNSW also provides a specific visitor profile for Manly. This research is conducted every two years.

Further visitor insights, including satisfaction, can be captured through local visitor surveys and online platforms such as TripAdvisor and Facebook.

In order to truly invest in protecting the destination's future — for the enjoyment of tourists and residents alike — Council will continue to survey residents to gauge public sentiment to tourism on the Northern Beaches.

To monitor trends, which can change visitor profiles and potentially impact on the plan.

This plan identifies a range of priorities to sustainably guide and grow the Northern Beaches visitor economy over the next five years, and the two year recovery plan identifies the actions needed to reach this potential.



Glossary



Important industry-related terms are provided on the following pages.

Australian Tourism Data Warehouse (ATDW):

A centralised database of more than 40,000 Australian tourism product and destinations, supplying NSW product to 70 plus websites including australia.com. Destination NSW's Get Connected Program provides tourism operators with access to a tool called ATDW-Online.

Bookable product: A bookable product is a tour or activity that has a set price and is able to be booked and paid for in advance of a customer's travel.

Export ready: Tourism products that are ready to work with distribution partners to sell the product for example, third party distributors, or trade sales partners, such as inbound tour operators (ITOs), wholesalers and online travel agents (OTAs).¹⁰

Free and Independent Travellers (FIT):

FIT comprises the largest number of international tourist arrivals to Australia. Usually a solo traveller, in couples or small groups of friends or family. Usually plan and book their own trips, especially online. However, they also use travel agent services and often book small group or private tours.

High-yield markets: Markets who have the propensity or capacity to spend more money on their holidays or during leisure time. For example, expensive boutique-style accommodation and experiences, such as small group or personalised tours.

Market ready: Refers to a business that markets to potential visitors and communicates with potential visitors year-round, and is ready to accept advanced bookings or reservations.

Products and packaging of tourism experiences:

'Product' refers to any tourism service or combination of services that can be offered to the market for sale, use or consumption. This includes physical objects, services, people, places, organisations and ideas. Tourism operators can create packages by partnering with transport services and accommodation providers etc.

Seed Funding and Grant Funding (for events):

Seed funding is about investigating and establishing new events while grant funding is more directed to existing events.

Visiting Friends and Relatives (VFR): Includes those visiting friends (typically a younger demographic) and those visiting relatives (older demographic). They are increasingly choosing to stay in commercial accommodation and engage local residents in tourism activities.¹¹

Visitor economy: The term 'visitor economy' refers to the production of goods and services for consumption by visitors, which includes the industries that directly serve visitors, such as hotels, transport providers, tour companies and attractions, as well as intermediaries and those involved indirectly, such as retail and food production. This recognises that visitor activity does not occur in isolation and contributes to investment and jobs across a range of industry sectors.¹²

Youth market: People aged between 15 and 29 years. The segment contributes 25% of all visitor arrivals to Australia and 45% of all visitor spend. It includes working holiday makers, who tend to stay longer, spend more and disperse more widely throughout the country than most other target segments.¹³



