

Destination Northern Beaches

Snapshot



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The draft destination management plan (DMP) Destination Northern Beaches: Creating a Sustainable Visitor Economy is Northern Beaches Council's five year strategic plan to set the direction and guide the growth of our visitor economy.

The DMP takes into account the needs of visitors, local residents and our business community, including supporting employment opportunities and contributing to the vibrancy of our region's thriving villages and centres. It also identifies challenges and goals to realise the greater economic potential of tourism on the Northern Beaches. Key priorities are digital representation, visitor servicing, seasonality, dispersal of visitors, average length of stay and visitor spend.

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

Visitor expenditure was estimated at \$500 million per annum which supported the year round sustainability of many businesses in the area.

The closure of international and domestic borders, and social distancing restrictions has had a dramatic impact on the local tourism industry with significant job losses in the hospitality and retail sectors identified to date.

Current research by Tourism Australia suggests over 50 percent of people are already planning or intend to travel within Australia in the next six months, indicating there will be an opportunity for a significant rebound in domestic tourism.

The draft DMP is supported by the COVID-19 Recovery Plan which is a two-year action plan specifically aimed at providing a quick response to help local tourism operators

rebound, recover and drive new business in the wake of the impact of the global pandemic.

These documents together provide a framework to support the local tourism sector recover and rebuild in both the short and longer term. This includes focusing on domestic travellers to help fill the gap left without international visitors by finding ways to get day trippers (those visitors who do not stay for more than one day) to stay longer and encouraging people to visit and stay in areas across the whole Northern Beaches.

Draft Destination Northern Beaches: Creating a Sustainable Visitor Economy Vision

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

Goal - Achieve a balance between economic growth and protecting the environment and social values.

High level objectives

- 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 (spend), length of stay and repeat visitation
- 4 Address seasonality with increase visitation during low and shoulder seasons
- 5 Build a resilient and capable tourism industry and strengthen and enhance collaboration
- 6 Respond to COVID-safe practices and resulting market trends, desires or expectations

Who is coming to the Northern Beaches?

In 2019/20 most of our visitors were from Australia with 81 percent being domestic day trippers and 16 percent domestic overnight visitors. Of this only three percent were international visitors.

While overseas travellers do not make up a high percentage, they typically stay much longer than domestic visitors, significantly adding to the visitor economy.

COVID-19 restrictions have meant we have a growing need to focus on our local tourist markets.

In recent years we know that the primary reason domestic tourists travel to the Northern Beaches is to visit friends and relatives (VFR) and international visitors is equally split between the reason for travel being VFR and Holiday. The DMP identifies a need to convert many of the domestic day visitors to stay overnight.

Year 2019/20	81,410 International visitors	435,587 Domestic overnight	2,174,250 Domestic day	2,691,247 Total visitors
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Northern Beaches target markets

The key to achieving economic value is to identify potential customers and understand what motivates them as this is an important part of any marketing strategy.

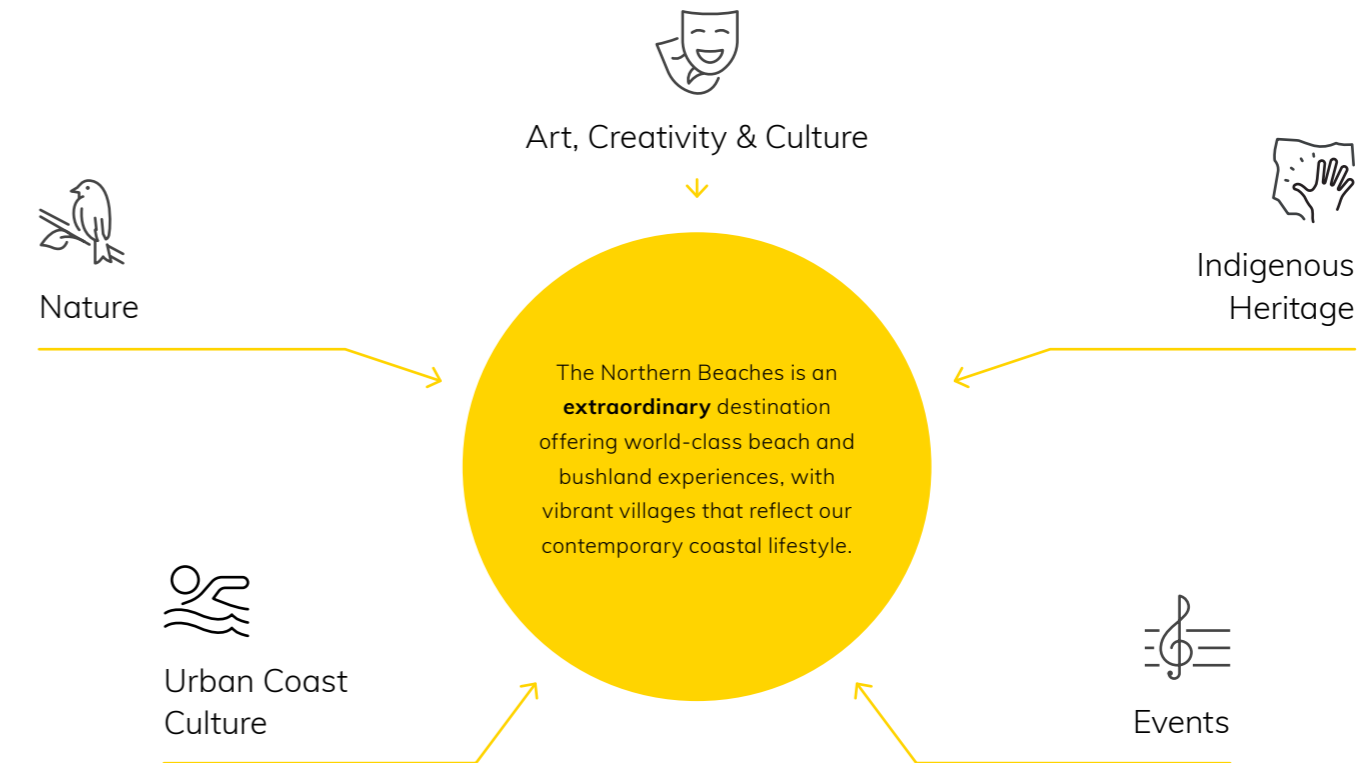
As a result of our goal and high level objectives, product audit, analysis of the visitor research and relevant global trends in tourism, the following target markets have been identified for the Northern Beaches:

- Active people, 55 years and over
- Contemporary female travellers
- Travellers visiting friends and relatives (VFR)
- Business travel (including raising awareness and appeal of the Northern Beaches for hosting smaller-scale, boutique or bespoke conferences and events).

Experience framework and visitor themes

An experience framework creates an easy way to see what products are already on offer and highlights opportunities that can be filled by the tourism sector. The local Northern Beaches community and tourism industry have helped identify the following five themes, which build on the existing strengths of the Northern Beaches and tap into global trends in tourism.

1. Arts, creativity and culture
2. Events
3. Indigenous heritage
4. Nature
5. Urban coast culture



Draft Destination Northern Beaches: COVID-19 Recovery Plan 2020-2022

In response to the devastating impact of the pandemic on the tourism industry, a two-year plan has been developed to identify priority actions to help local operators get back on track and build resilience.

The draft recovery plan is based on three areas including:

1. Shifting demand – recognising the increasing importance of digital visitor servicing. With more people at home and planning travel trips online, there is an urgent need to enhance Council's online visitor platforms. Targeted campaigns to encourage a shift in demand from day trippers to overnight visitors, including visitors within 2 to 3-hours drive of the Northern Beaches and high-yield markets.

2. Strengthening supply – focus on creating COVID-19 safe itineraries and visitor experiences, in line with Council's COVID-19 Summer Action Plan for Outdoor Public Spaces. Pilot pop-up initiatives, such as 'glamping', park and ride initiatives to alleviate beach parking, and mobile visitor information servicing to encourage visitors to stay and spread out across the region.

3. Industry capacity building – COVID-19 highlighted the need for resilience and capacity building within the tourism industry to adapt to COVID-19 safe requirements and tap into new markets. Empower tourism operators with information and support to enhance customer services, adopt COVID-19 safe measures, improve digital presences and identify new markets.

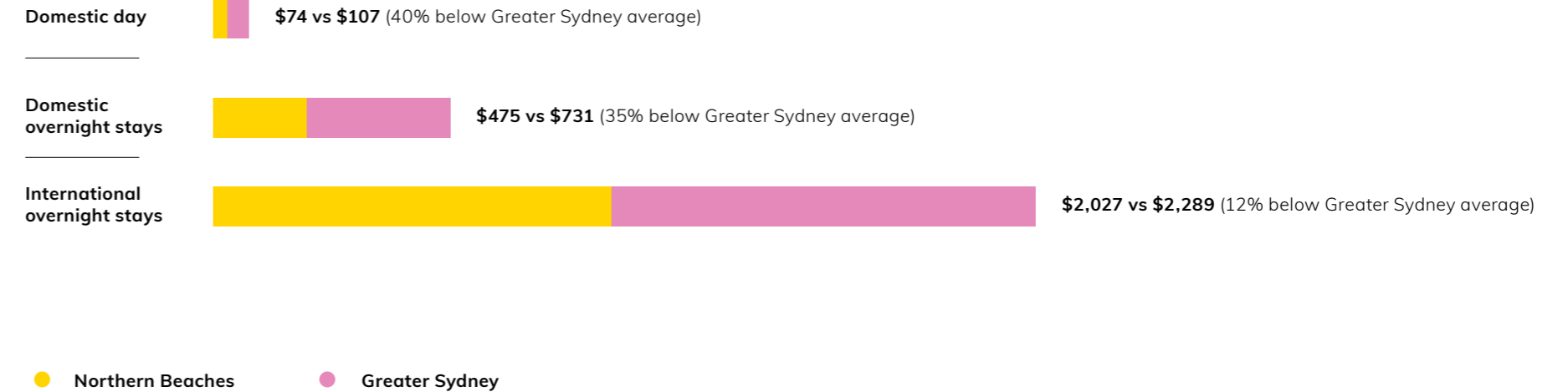


Why do we need a Destination Management Plan?

Research shows that prior to the global pandemic our visitor expenditure growth over the last 10 years has significantly lagged behind Greater Sydney (3.24% pa vs 9.12% pa) and that our visitor economy has underperformed compared

to both the national and Sydney averages. Like the rest of Australia, we have seen substantial job losses since March 2020, especially in the tourism and hospitality sectors. 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). The task for the Northern Beaches tourism sector is to reorientate itself to capitalise on this and especially to convert day trippers to overnight stays.





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