

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.

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.



Image Credit:

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

Contents

Mayor's Message	4	What the travel market wants	32	Delivering the plan	54
Executive Summary	5	Product audit	33	Governance and leadership	55
Introduction	10	Accommodation	34	Tourism industry development	56
Warami, Welcome	12	Stakeholder and community engagement	36	Destination management framework	58
Manly	13	Key stakeholders and information used to inform the Plan	37	Altogether extraordinary	59
Palm Beach	14	Engagement process	38	Place brand idea	60
Beyond the Beaches	15	What we were told	39	Brand framework	61
Destination analysis	16	Opportunities and challenges	42	Vistor services	62
Importance of our visitor economy	17	Experience themes	43	Measuring success	64
Economic challenges and issues	18	The strategy	49	Action plan	65
Scenario summary	19	Strategic aim	50	Focus area 1 - Destination management	66
Understanding visitor spend	20	Goals	51	Focus area 2 - Destination marketing	71
Reasons for visiting	24	Focus areas	52	Glossary	73
Impact of COVID-19 on the Northern Beaches visitor economy	26			Destination statement	76
Target markets	30				

Mayor's Message



Our community is passionate about protecting the Northern Beaches' way of life, our natural and cultural heritage and ensuring we work towards a sustainable future.

We know through the process of drafting this Destination Management Plan (DMP) that one of the great challenges for us is managing the constant pressure on our community from the impact of high volume visitation, while at the same time ensuring we have a vibrant local economy that supports local jobs and businesses.

At the time of writing though, we see our tourism sector and visitor economy deep in crisis after what is now our third lock down from the global pandemic.

Now more than ever we, as destination managers, need to be proactive in managing the impact of our visitor economy in a way that makes the Northern Beaches better, not just economically but also socially and environmentally.

This Destination Northern Beaches Plan marks a new direction for us that will see our extraordinary destination continue to be a great place to live, work and visit if we look after it together.

A handwritten signature in black ink that reads "Michael Regan". The signature is fluid and cursive, with a long horizontal line extending to the right from the end of the name.

Michael Regan
Mayor

Executive Summary

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

Destination Northern Beaches: Creating a Sustainable Visitor Economy, is a five year strategic plan, aligning to the NSW Visitor Economy Strategy 2030 including an 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 community, local industry and all levels of government. The Plan is as much about the local community as it is the visitor.

The aim is to balance the economic potential of tourism for the region with protection of the environment and the value of our lifestyle. It recognizes the value of the visitor economy in creating local jobs and revenue, at rates twice the NSW average, and the role of visitor spending in supporting the vitality of many of our towns and villages. The global pandemic has highlighted the vulnerability of our tourism sector as visitor numbers and spending declined, along with job losses and falling business confidence.

This Plan has been shaped and informed through research and community engagement.

It has a clear strategic aim which is supported by three high level goals aiming to achieve a destination stretch target of bringing visitor expenditure growth in-line with the rest of Sydney.

Key to obtaining the stretch target is to convert domestic day trippers to overnight stays until such time as international travel returns. We will achieve this through increasing spend per visitor (yield) as statistics show, overnight visitors spend six times more than day trippers.

Strategic aim

We will balance developing a sustainable visitor economy with managing the impact of visitation. As destination managers we will protect our region and its key attributes, preserve our natural environment and uphold our community's way of life.

Destination stretch target

To double visitor spending over the next five years to 2026, bringing it in line with the Greater Sydney growth rate.

Destination statement

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

Goal 1

Focus on yield over volume!

Increase visitor expenditure to be comparable with growth in Greater Sydney

Convert domestic day trippers to overnight visitors

Aim to grow tourism in higher yield markets (i.e. Business sector)

Goal 2

Become the brand promise: Altogether extraordinary.

Deliver outstanding visitor services through innovative digital platforms

Support development of unique experience offerings

Create targeted marketing programs that promote pride in the local community and drive valued visitation

Goal 3

Making the region key to Sydney's place in the world.

Promote visitor understanding of environmental policies and support sustainable tourism

Collaborate with the community, key stakeholders and governments to target investment in experience offerings

Manage tourism related public spaces and facilities in peak season to promote wider enjoyment of the region

Focus Area 1

Destination management

(strengthening supply, capacity and governance)




Focus Area 2

Destination marketing

(shifting demand)

Focus area 1

Key: Each focus area will support achieving our goals

 Goal 1  Goal 2  Goal 3

Destination management (strengthening supply, capacity and governance)

Disperse visitation

We will support the development of quality experiences that build on recreational assets throughout the region to spread the economic benefits and reduce pressure on key destinations during peak times.

Industry collaboration

We will work together with businesses, key stakeholders and state and federal government agencies to support cross-sector leadership and governance.

Product development

We will support our local businesses to expand the product base to promote quality and diversity of visitor experiences.

Transport and connectivity

We will plan and support improved physical movement access to and within the region and the impact on parking.

Environmental sustainability




We will help businesses become environmentally sustainable and deliver outcomes to benefit the region.

Planning and facilities

We will improve planning and coordination to support the region's capacity for seasonal impacts from visitation and the amenity of our open spaces.

Focus area 2

Key: Each focus area will support achieving our goals

 Goal 1  Goal 2  Goal 3

Destination marketing (shifting demand)

Attract business and major events

We will focus on attracting and developing events, including business events that drive overnight visitation in off peak seasons and mid-week.

Reduce seasonality

We will focus on marketing and promotion to drive visitation in shoulder and low season periods to support a sustainable visitor economy.

Brand and positioning

We will build on the Northern Beaches place brand to reflect the uniqueness and individual characteristics of our town centres and villages.

Visitor services, digital innovation and content

We will use data to inform and develop content and channels to engage visitors and ensure collaboration across third party channels to target value markets.

Support community engagement

We will continue to engage with our community to promote understanding of the value of the visitor economy.

Target high-value markets

We will focus on high value target markets and focus on increasing spend while managing a sustainable volume.

Destination management:

- create an industry-based tourism group (Destination Management Group) to support cross-sector leadership and governance
- through the LEP review consider new opportunities for tourism orientated development
- undertake a Place Plan for Manly to reinforce its role as the visitor gateway
- implement smart technology, such as Park and Pay App, and shuttle bus services to better manage parking
- plan for new off-road cycling facilities, including new bike parks and trails, to meet growing demand
- encourage operators to package 'hinterland' experiences and leverage Coastwalk, to disperse visitation
- develop Aboriginal cultural tourism and explore nature-based tourism opportunities to diversify visitor experiences

Destination marketing:

- develop a destination brand identity, building on the Northern Beaches place brand and reflecting distinct characteristics of our villages
- develop a Visitor Servicing Strategy and create a dedicated destination website to enhance visitor experience
- implement an off-season campaign targeting Visiting Friends and Relatives to reduce seasonality
- develop and support multi-day events and b-leisure travel market to encourage mid week stays
- advocate to Destination NSW to promote the Northern Beaches as a premier visitor destination.

Summary of Key Actions

We will develop annual delivery plans aligned with a summary of most significant actions. (see page 65 for all actions)

How we will measure our success

- Annual evaluation and performance tracking will ensure delivery of the Plan is in line with the strategic aim and progressing towards the stretch target.
- Council will continue to work with Destination NSW, Tourism Research Australia and The Population Experts to develop and monitor KPIs to understand the value of the visitor economy and community satisfaction, at a local level.
- We will set specific local targets once domestic and international travel resumes and we better understand the capacity and rate of recovery of the tourism industry. This may include growth of total visitor spend, increase in number of visitor nights (international and domestic) and improvement in overall visitor satisfaction.

We will annually monitor recovery and performance of the Northern Beaches economy by developing a range of indicators in-line with the NSW Government's "NSW Visitor Economy Strategy", listed below:

- community satisfaction
- visitor expenditure (by domestic day and overnight)
- share of Gross State Product and Jobs
- average length of stay
- average yield (spend)
- repeat visitation
- investment in visitor infrastructure
- access to visitor attraction
- visitor satisfaction accommodation and experiences
- visitor attendance and economic impact with events.

We will partner with our local tourism industry and Government to better manage our destination, focusing on enhancing visitor products and experiences, attracting high value markets and showing stronger destination leadership.

We will create strong consumer messaging, build local pride and showcase the experiences that make the Northern Beaches extraordinary. This will drive our region's economic recovery and accelerate future growth.

Destination Statement

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

Introduction

A vibrant tropical forest scene with a paved path. In the foreground, a large, thick tree trunk with reddish-brown bark stands on the right. To its left, a thinner tree trunk is wrapped in a light-colored vine. The path curves through the dense greenery, where several people are walking. A child in a white shirt and colorful shorts is walking away from the camera, while a group of people, including a woman in a green shirt and a child in a blue hat, are walking towards the camera. The background is filled with various tropical plants, including palm trees and large-leafed shrubs, with sunlight filtering through the canopy.



Warami

Welcome to Sydney's Northern Beaches.

Home to Aboriginal people for thousands of years, today it is a destination that is desired as a great place to live, work and visit.

Famed for its effortless beauty and defined by coastal foreshores, sweeping beaches, islands, national parks, bushlands, rural areas and reserves. It is a region bounded by water, Broken Bay to the north, the Tasman Sea in the east, Sydney Harbour and North Harbour in the south, and Middle Harbour in the west. A place that boasts one of the highest urban tree canopy coverages in Greater Sydney.

The region is marked by two iconic destinations, Manly in the south and Palm Beach in the north, and throughout the region there is an abundance of experiences enjoyed by locals and visitors alike from nature, to arts and creativity, culture, indigenous heritage, events and vibrant town centres and villages.

Figure 01
Northern Beaches Local Government Area (LGA)





Manly

'Australia's best beach' TripAdvisor 2018 & 2019

'Manly Scenic Walkway' TripAdvisor 2021

Manly has played host to world titles in swimming, surfing and surf life saving contributing to its reputation as an iconic destination.



Gayamay, Manly Cove on the sandy western side of the Manly peninsula, is a globally significant area. In 1788, at Manly Cove and Collins Cove, some of the earliest recorded contacts between the Gayamaygal and British people of the First Fleet took place.

From the mid-19th century, Manly became the official gateway for visitors to the Northern Beaches.

“7 Miles from Sydney and 1000 miles from care” was the slogan used by the Port Jackson and Manly Steamship Company in 1940 and still holds true.

Today, it is celebrated as 'Australia's best beach' by visitors, awarded in 2018 and 2019 along with Manly Scenic Walkway in 2021 ranking it in the top 10% of attractions worldwide by TripAdvisor Travellers' Choice awards. The ferry journey between Circular Quay and Manly is one of the world's most famous.

The town centre is bordered by foreshore areas that connect the Northern Beaches Coast Walk, North Head National Park and Cabbage Tree Bay Aquatic Reserve. In 2021 millions of reviews from TripAdvisor travellers place the Manly Scenic Walkway in the top 10% worldwide attractions.

It features a world-class ocean front walkway to Shelly Beach and the laneways are filled with cafes, shops, restaurants and bars, making Manly the only designated late night precinct on the Northern Beaches.

There are a number of significant environmental heritage-listed public spaces and buildings that contribute to the street scape through their period-style and built form.

The positioning of Manly as an attractive overnight destination is key to generating stronger economic value from visitation.

Palm Beach

International visitor icon

At the northern end of the region, Palm Beach is renowned for its natural amenity. The iconic heritage-listed Barrenjoey Lighthouse is a much sought after visitor and local destination.

Since the 1920s Palm Beach has been a popular holiday destination for the rich and famous with many fine holiday houses established such as Kalua, built by R.J. Hordern who also planted the Norfolk Island pines along the beach.

It was also a popular destination for camping holiday makers for many years until the 1970s.

The whole area is characterised by its iconic water views, with Pittwater to the west and the South Pacific Ocean to the east. It is a key destination for swimming, surfing and boating.

It is also famously known as 'Summer Bay' to viewers of the TV show, Home and Away, and has attracted thousands of visitors over the years with an opportunity to meet the actors. More recently the beauty of the destination featured on the big screen in the film, Palm Beach, directed by Rachel Ward.



Beyond the Beaches

While recognising the national and international importance of Manly and Palm Beach as our visitor gateways to the Northern Beaches, there is a much wider visitor offering across the region.

A focus of this plan is to encourage visitors to explore the whole Northern Beaches, taking some of the pressure off Manly and Palm Beach at peak times and also spreading the economic benefits more widely.

While the beaches will always be a drawcard, there are a range of waterways which offer a point of distinction of the region and support visitation. These include Manly Dam, Narrabeen Lagoon and Pittwater, which host diverse wildlife and provide for array of water-based activities, such as sailing and kayaking.

The region also benefits from extensive coverage of National Parks and Bushland which provide for an abundance of walking trails from short strolls to multi-day adventure experiences, such as Ku-ring-gai Chase National Park and North Head in Sydney Harbour National Park.

Mountain biking and off-road cycling has seen significant growth in demand and the region has benefited in new facilities such as Bare Creek, making it a recognised biking destination. In the hinterlands of the region there also exists many other visitor experiences to explore, such as horse-riding and golf, art and heritage or food and beverage.

Promoting the breadth of visitor offerings across the Northern Beaches, provides an opportunity to both encouraging visitation throughout the seasons and dispersal of visitation across the region.





Destination analysis

Importance of our visitor economy

Prior to the COVID-19 pandemic tourism contributed twice as many jobs and revenue to the Northern Beaches economy,

Visitor spend is vital to the year-round sustainability of our local business community. Our tourism industry is what makes our town centres and villages so vibrant and dynamic.

It goes well beyond accommodation and tours and has a significant ripple effect to other sectors, like hospitality and retail.

Our tourism and hospitality sector accounts for 12% of all our jobs (13,000 jobs), many of which are young local workers. This sector also provides 12% of “value add” to our local economy.

Both of these measures are twice the NSW average, an indication of how dependent our local economy is on the strength of tourism and hospitality.

Figure 02

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

Figure 02 source:

<https://economy.id.com.au/northern-beaches/tourism-value?sEndYear=2018>

Source: Tourism Research Australia data on Northern Beaches supplied by TRA

Economic challenges and issues

Research shows growth in visitor spend over the last 10 years is significantly lagging behind the rest of Greater Sydney (3.24% pa vs 9.12% pa).

Prior to COVID-19, our visitor economy was underperforming compared to both the national and Sydney averages. The data shows visitors to the Northern Beaches tend to spend less when compared with 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)

One of the plan's strategic goals is to increase spend per visitor (yield), rather than visitor numbers, to sustainably grow the visitor economy. To illustrate this we have developed a 'stretch target' to grow visitor spend in line with or even above, the Greater Sydney growth rate over the next 10 years to 2030.

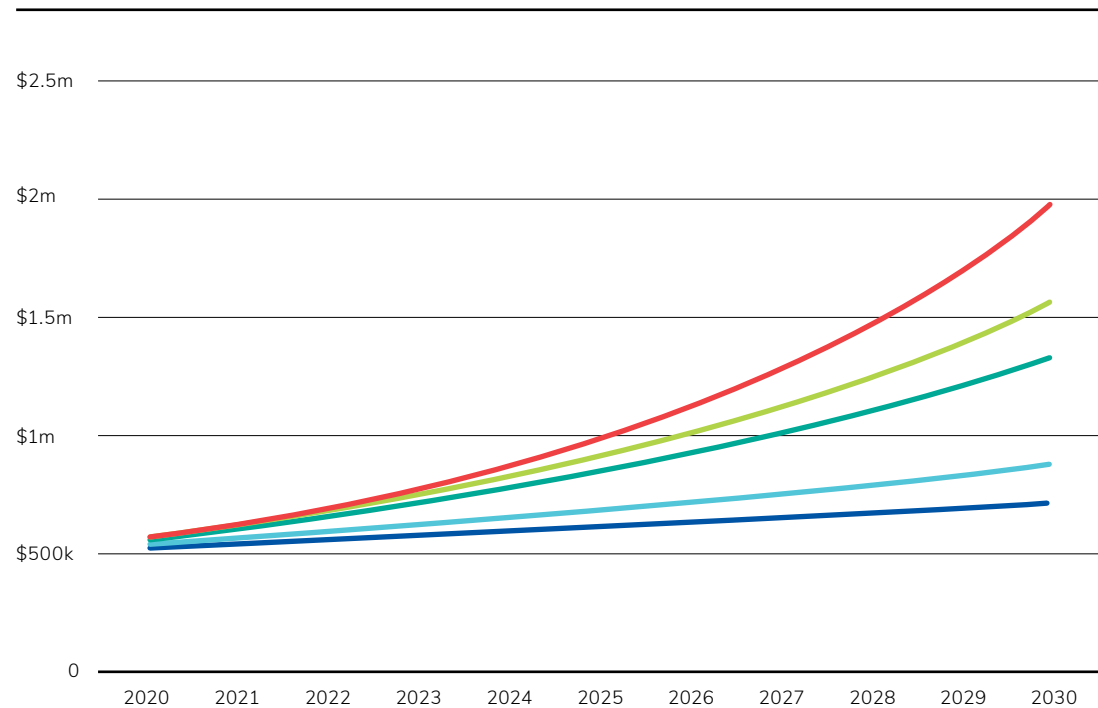
A series of scenarios has been developed to demonstrate the scale of benefit that increased visitor expenditure could bring. This would potentially see the visitor expenditure on the Northern Beaches more than doubling within the next five years to 2026, even quadrupling, over the next 10 years to 2030 under the highest growth scenario.

Scenario summary once travel resumes

- **No change** to the current average annual growth rate in visitor expenditure for the Northern Beaches of 3.24%.
- **Limited action** to correct recent decline in market share. Aim to achieve the same average annual growth rate as Australian average annual growth rate of 5%.
- **Significant action** taken to address the recent decline in market share. Aim to achieve the same average annual growth rate as Greater Sydney (9.2%).
- **Focused action** relating to the domestic market to reverse the recent decline in market share in the initial phase. Aim to achieve a higher average annual growth rate than Greater Sydney, targeting the domestic market with a staged increase in visitor expenditure (+10% staged).
- **Strategic approach** relating to both the domestic and international markets to reverse the recent decline in market share and capture growing share of both markets (+10%).

Figure 03

Forecast scenarios for Northern Beaches' visitor economy to 2030 (developed prior to COVID-19 pandemic)



Understanding visitor spend

Destinations increasingly understand that visitor spend is the true metric of success, rather than simply visitor numbers.

One of the biggest challenges to growing the visitor economy is the relatively low spend of domestic day visitors. In 2019/20 this segment accounted for 81% of all visitors, yet only contributed 18% of all visitor spend.

Conversely, international visitors, while only making up for 3% of all visitors, contributed 41% of all visitor spend due to their longer length of stay (66% of all visitor nights).

Domestic overnight visitors, which account for 16% of all visitors, contributed a further 41% of visitor spend. This segment tended to have shorter stays (34% of all visitor nights), favouring weekend or mini breaks.

Figure 04
Visitor numbers

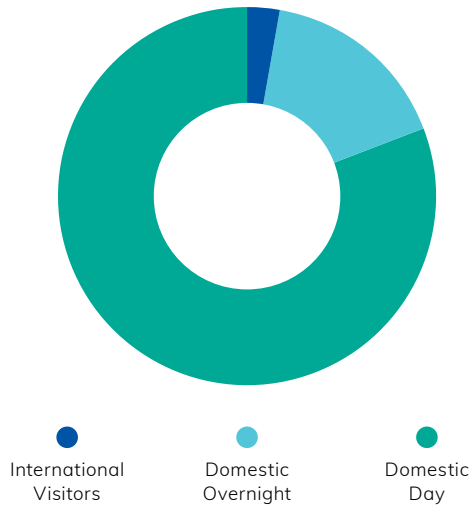
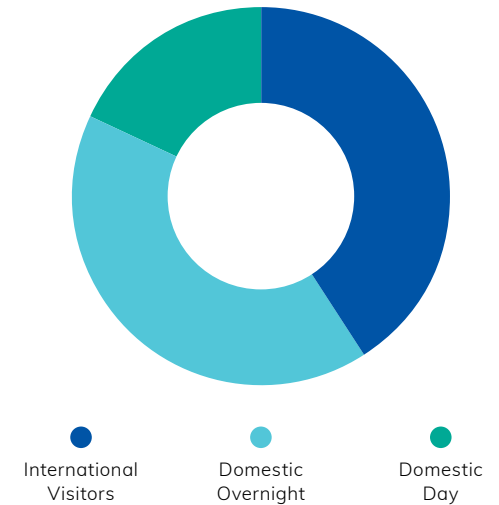


Figure 05
Visitor nights



Figure 06
Visitor spend



While recognising the contribution of day trippers from outside Sydney, to truly grow visitor spend, the focus must be on encouraging overnight stays. In the absence of international travel, this relies on our ability to attract domestic visitors to stay overnight on the Northern Beaches.

This visitor data is based on Tourism Research Australia data, which considers a domestic “visitor” (Domestic Day and Domestic Overnight) to be someone who lives outside a 25 km radius from the destination they are visiting. This would therefore exclude most of Sydney.

Based on available credit and debit card transaction data from Spendmapp, visitor spend accounts for 19% (almost \$1.3billion) of all spend on the Northern Beaches between February 2020 and January 2021 (both local residents and visitors). Here a ‘visitor’ is defined as anyone outside the Northern Beaches (so could be within 25 km of Northern Beaches).

Research shows the majority of visitor spend (60%) comes from the rest of Greater Sydney, with a further 30% from interstate and less than 10% regional NSW. This shows the valuable contribution of Sydneysiders in supporting the local economy, which is not captured in the above Tourism Research Australia data.

Figure 07
Visitor numbers, nights and spend

	International	Domestic Overnight	Domestic Day	Total
Visitor Numbers	81,410	435,587	2,174,250	2,691,247
	3%	16%	81%	
Visitor Nights	2,224,497	1,143,292		3,367,789
	66%	34%		
Visitor Spend (\$m)	209	210	92	511
	41%	41%	18%	

Figure 07 Source:
Tourism Research Australia, National Visitor Survey and International Visitor Survey 2019/20

Across the Northern Beaches, between February 2020 and January 2021, 'Dining and Entertainment' was the biggest area of visitor spend (23%), followed by 'Grocery Stores and Supermarkets' (14%) and 'Travel' which includes visitor accommodation (12%).

The contribution of visitor spend to local centres varies across the Northern Beaches. Visitor destinations such as Palm Beach and Manly rely significantly more on the visitor dollar (52% and 26% respectively).

For other local centres such as Newport, Avalon, Mona Vale and Dee Why, visitor spend is also vital in supporting their viability.

Figure 08
Visitor spend by category



Figure 09
Contribution of visitor spend for key centres

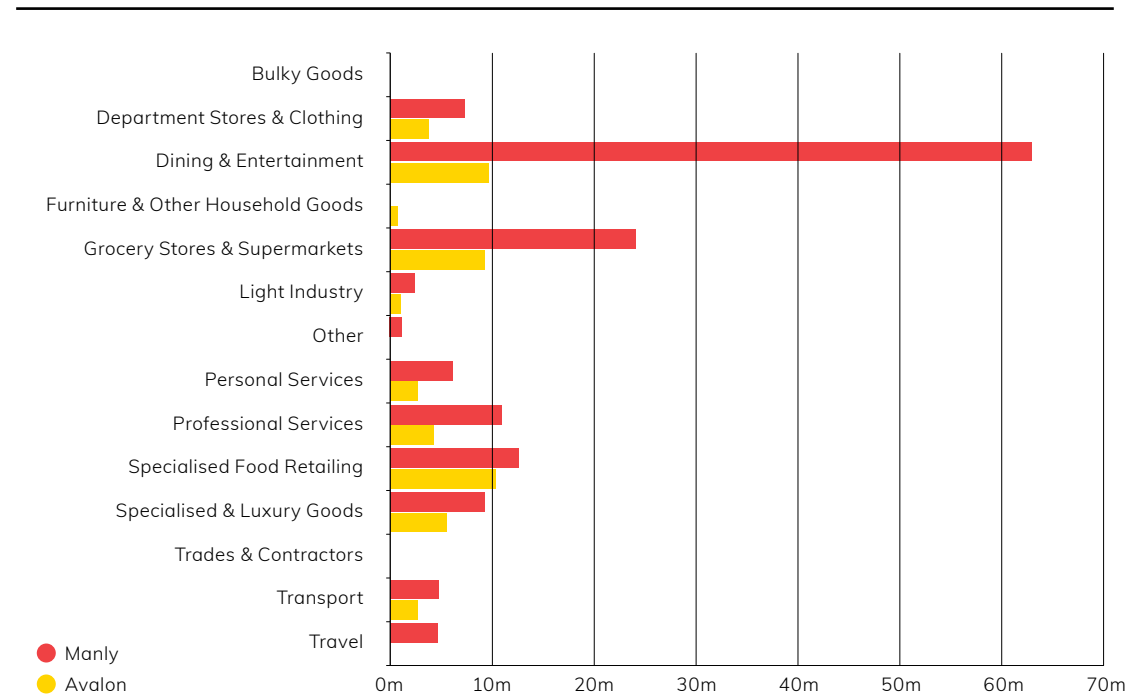
Suburb	Value \$m (Feb 2020-Jan 2021)	Visitor spend % total
Palm Beach	\$19.9	52.3%
Manly	\$143.0	26.2%
Newport	\$44.5	23.9%
Avalon	\$37.6	16.9%
Dee Why	\$69.0	11.7%
Mona Vale	\$81.7	11.7%

Figure 08, 09 & 10 source: Spendmapp.com.au

For most suburbs 'Dining and Entertainment' businesses are the beneficiaries of visitor spend, as well as local retail. See example breakdown of visitor spend in Manly and Avalon.

While visitor numbers and expenditure are important measures of the tourism sector, they are not the only measure of success. As the tourism economy gradually recovers from the pandemic, the awareness of travellers has heightened during lockdown, with increased expectations for a sustained recovery. Measurements of visitor satisfaction, transformation and wellbeing will play a large role in the measurement of a successful tourism sector.

Figure 10
Breakdown visitor spend Manly vs Avalon (February 2020 - January 2021)



Reasons for visiting

Visiting Friends and Relatives (VFR) is a defining feature of the Northern Beaches' tourist market.

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

Traditionally, VFR accounts for the majority of domestic visitors (54%), who stay an average of 3.1 days.

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 main reason for coming here, especially compared with the rest of NSW.

Prior to COVID-19, the 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 they have a strong international student intake.

These courses provide employment opportunities and contribute to the vibrancy of the region's thriving villages and centres. They also contribute significantly to the local economy with ICMS estimated to inject around \$20 million to the Manly area. Opportunities to encourage international students and their VFR to explore the local area should be considered, including welcome kits with local experiences.

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

Figure 11

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

	Visitors	Visitor Nights	% Visitors ¹	Av. Length of Stay (days) ¹	Visitors	Visitor Nights	% Visitors ¹	Av. Length of Stay (days) ¹
Domestic overnight					International			
Visiting friends and relatives	1,317,444	4,139,579	54.3%	3.1	174,905	2,753,160	35.8%	15.7
Holiday	636,445	1,856,091	26.2%	2.9	175,560	3,678,900	36.0%	21
Business	344,200	978,417	14.2%	2.8	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	132,695	566,839	5.5%	4.3	68,652	1,542,227	14.1%	22.5
Total	2,426,159	7,540,927	100%	3.1	487,977	12,019,884	100%	24.6

Figure 11 source:TRA - <https://economy.id.com.au/northern-beaches/tourism-visitors-reason>

Impact of COVID-19 on the Northern Beaches visitor economy

Prior to COVID, visitor expenditure contributed an estimated \$500million to the Northern Beaches local economy in 2018*.

Visitor numbers

Visitor numbers dropped dramatically as a result of border closures, with effectively 100% reduction in international visitors for the 2020 June quarter compared to 2019 June quarter (April to June).

Domestic overnight visitor numbers were also down 80% and domestic day trippers were down 45%, compared to same time of year before (note these are relatively small sample sizes).

Figure 12

Change in visitor numbers June quarter 2020 compared to 2019

	June quarter 2019	June quarter 2020	Change YoY	% Change
International	20,977	-	-20,977	-100%
Domestic overnight	135,236	27,676	-107,560	-80%
Domestic day tripper	614,062	334,939	-279,123	-45%

Figure 12 source:

Tourism Research Australia,
National Visitor Survey and
International Visitor Survey
2019/20

Visitor spending

The Spendmapp data includes credit and debit card transactions from people living outside the Northern Beaches LGA, which shows the significant impact of both the late March-June 2020 and mid December 2020 to early January 2021 lockdowns on visitor spend.

Visitor spend did then show signs of recovery in February 2021 to marginally above February 2020 levels, and significantly higher in April to May 2021 compared to lockdown levels the year before.

However, visitor spend was down in June 2021 compared to June previous year, and data does not include impact of lockdown commencing end of June 2021.

Figure 13
Visitor spend YOY change

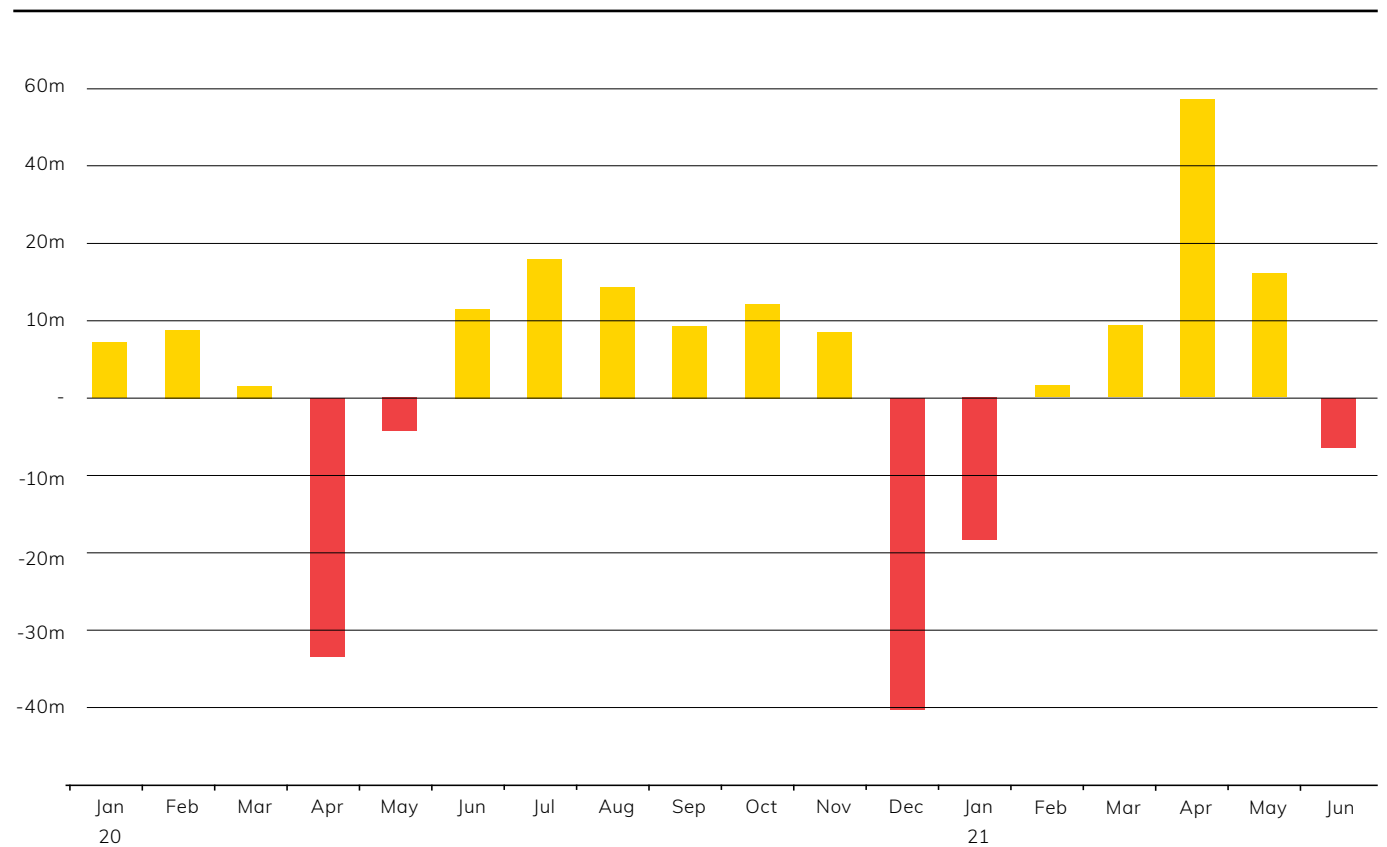


Figure 13 source:
Spendmapp.com.au

Local employment

The impact of COVID-19 on the visitor economy is clearly visible in the decline in jobs in this sector. Between March and December 2020 there was a reduction of around 3,000 local jobs on the Northern Beaches. In particular the 'Accommodation and Food' and 'Arts and Recreation' sectors which largely represent the visitor economy, were most significantly impacted, with around 3,000 fewer jobs in the 'Accommodation and Food' sector. This loss was offset by job growth in Healthcare and Education sectors

Figure 14

Change in local jobs (March - December 2020)

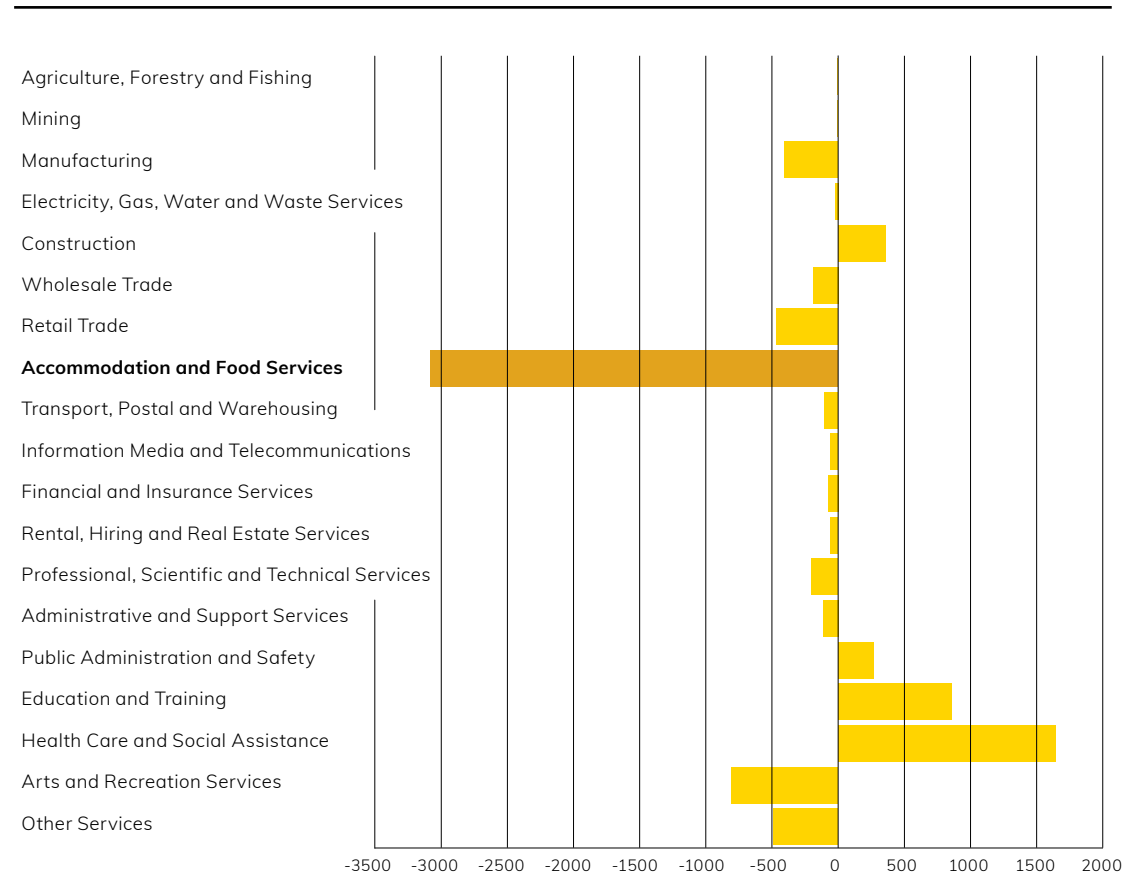


Figure 14 source:
ID The Population Experts

Tourism industry survey

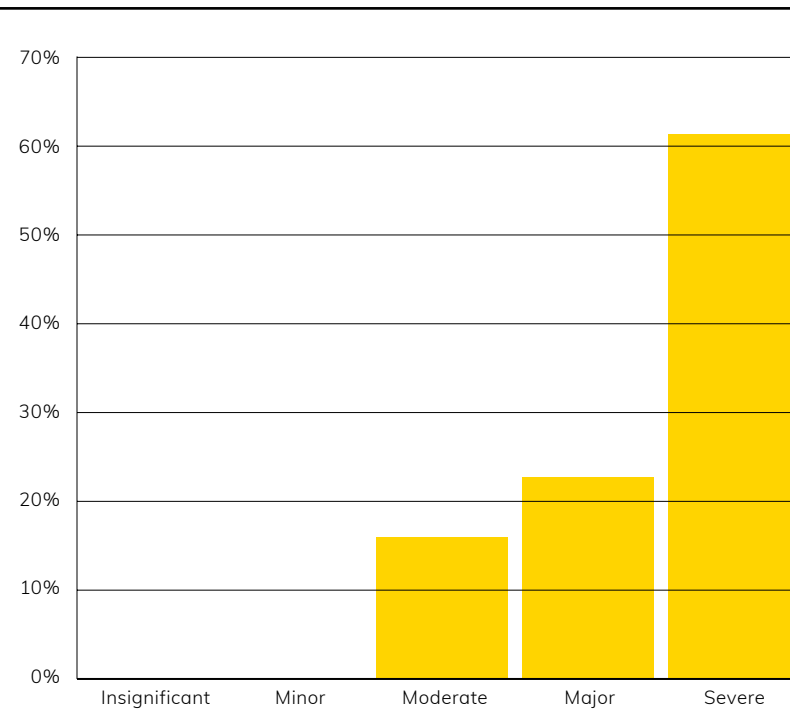
To better understand the impact of COVID-19 on local tourism operators, Council conducted a survey in September 2020.

- 84% of respondents said they were 'majorly' or 'severely' impacted
- 33% of respondents said sales revenue was down 50-75%
- 31% of respondents said sales revenue was down 25-50%

The survey identified that tourism operators want more information on new source markets, marketing and promotional assistance, and access to financial support to manage cash flow and to plan for recovery.

Figure 15

Overall impact of COVID-19 on your business



Target markets

Key to achieving economic value from visitation is identifying potential customers and understanding what motivates them to invest in the destination.

As a result of thorough analysis of visitor research, relevant global trends in tourism and consultation insights, the following target markets have been identified for the Northern Beaches.

- Active 55+
- Contemporary female 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 lists 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.</p> <p>Influences on length of stay include destination appeal and vibrancy, quality of food, experience offerings, health and wellbeing.</p> <p>Offers by hotel loyalty programs.</p>

What the travel markets wants

Cultural tourism is an important driver of the experience economy. There is appetite for locations of all types to showcase local arts, heritage, landscapes, traditions and lifestyles.

Australia Council's Domestic Arts Tourism research paper says: Arts tourists are high value tourists – they are more likely to stay longer and spend more when travelling than domestic tourists overall. The Northern Beaches Cultural and Creative Sector generated \$1.6 billion in output and \$790 million in value added in 2018/19, 6.5% of the total Northern Beaches economy.

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

Callout source:

Tourism Research Australia
International Visitor Survey (IVS)
NVS National Visitor Survey (NVS)

***See Skift Report:**

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

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 offer a number of settings where this trend should be further developed or promoted.

Immersive travel is highly sought after for genuine engagement and interaction with local people, nature, heritage and arts and culture. The story of the place and 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.

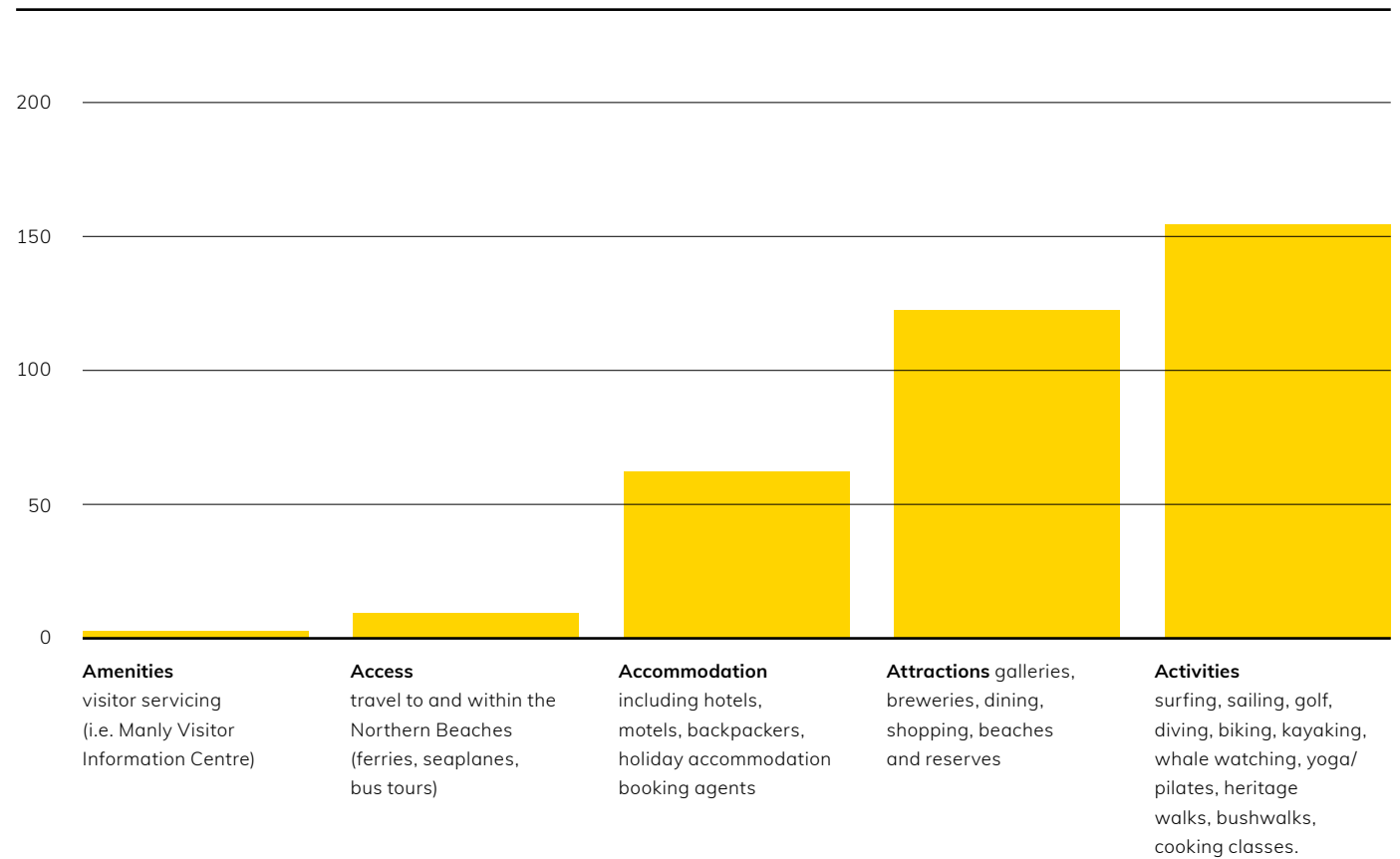
Sustainable and socially responsible destinations and experiences appeal to broader audiences especially in a time following the COVID-19 pandemic. Key to this will be the authentic sustainability practices of tourism operators, which will leave visitors with a transformed view of what is possible in their hometown and create positive opportunities for post-visit reviews and advocacy. Also key, is leveraging facilities such as the Coastal Environment Centres which demonstrate and profile a commitment to education and sustainability. The aim is to make sustainability mainstream rather than a premium offering and align actions that focus on continuity, creating a positive impact across culture, conservation, community and commerce (or people, planet, place, profit).

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.

Our region has many 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 many 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 when planning their stay. This has been obtained through online search engines (such as TripAdvisor and Google search), as well as products listed on the Australia Tourism Data Warehouse (ATDW) platform.

Figure 17
Tourism product audit no. of listings



Listings have been grouped under the five A's

Accommodation

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, The Sebel and Q Station and a number of serviced apartments. The hotels are critical to attracting tourism and pre-COVID-19, they were tapping into the growing b-leisure market midweek with 40% of midweek occupancy being conference attendees. On weekends, occupancy was mostly from the wedding and leisure market.

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 into private dwellings, potentially restricting this visitor market. Further north along the coastline, a series of budget accommodation is also available (Avalon beach backpackers, Pittwater Eco YHA and NRMA Sydney Collaroy Beachhouse 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 of 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 as well as 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, although 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.

It should be noted that under existing planning instruments short-term rental accommodation is exempt development in former Pittwater, but requires approval in former Manly and Warringah areas. Council investigates all requests relating to illegal uses regarding short term accommodation for properties within these areas and there is a Code of Conduct and Exclusion Register owners must follow.

Whilst this data does not include other short-term holiday 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.

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. This will also consider 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.

Residents that experience disruption as a result of short term holiday rental can be investigated by the Commissioner of Fair Trading as a breach of the Code of Conduct, which is enforceable under the NSW Fair Trading Act 1987.

Figure 18

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

Airbnb 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

Figure 18 Source:

Insider Airbnb,
December 2019

A photograph of a sunset over a body of water. The sky is a warm, golden yellow, and the water reflects this light. In the distance, a dark silhouette of a city skyline is visible. Several people are swimming in the water, their heads and shoulders above the surface. The overall mood is peaceful and serene.

Stakeholder and community engagement

Key stakeholders and information used to inform this Plan

Consultation played a key role in activating our local tourism industry and community, enabling each to contribute to this Plan.

The focus was on seeking input on how to best manage the impact of visitation and on ways to harness the economic potential of our visitor economy, recognising that visitors and tourism have been a feature of the

region for hundreds of years, from Australia's first resort town in Manly to the camping grounds of Palm Beach in the 1970's.

The consultation was critical at this time in the wake of the devastating impact of the Pandemic on the tourism industry.

Stage 1: Industry stakeholder engagement and tourism summit.

Aim: To understand the challenges and opportunities for the region's tourism market. This was invaluable in framing the overall direction.

As part of Stage 1 consultation Council held a Tourism Summit on 20 May 2019, which presented emerging tourism trends to kick start a conversation with tourism operators and interest groups on planning for sustainable tourism on the Northern Beaches. It was attended by over 80 local tourism and hospitality representatives, community stakeholders with presentations from Destination NSW and Tourism Australia.

Stage 2: Community feedback on the Key Directions Paper.

Aim: To understand the community response to the key priorities which set out the themes and purpose that shaped the draft DMP. This validated directions and provided further community insights.

A final review phase with key stakeholders including; Destination NSW, Manly Tourism & Economic Recovery Taskforce, local business chambers and Council's Strategic Reference Group, Economic Development and Smart Communities was also undertaken to inform the draft DMP. This included tourism industry impact and responses to the COVID-19 pandemic.

Stage 3: Exhibition of draft Destination Management Plan.

Aim: To seek broad community and stakeholder feedback.

Exhibition of the draft DMP during December 2020 February 2021 resulted in over 211 submissions and reached over 6,500 people who visited the project page. Feedback highlighted a broad range of community concerns about managing the impacts of visitation at peak times and key locations and also industry feedback on opportunities to support recovery and promote more sustainable tourism. This feedback informed a redrafting of the DMP with greater emphasis on Destination Management and Destination Marketing.

Engagement process

The development of the Plan has been informed by consultation, visitor research and relevant trends in tourism.



What we were told

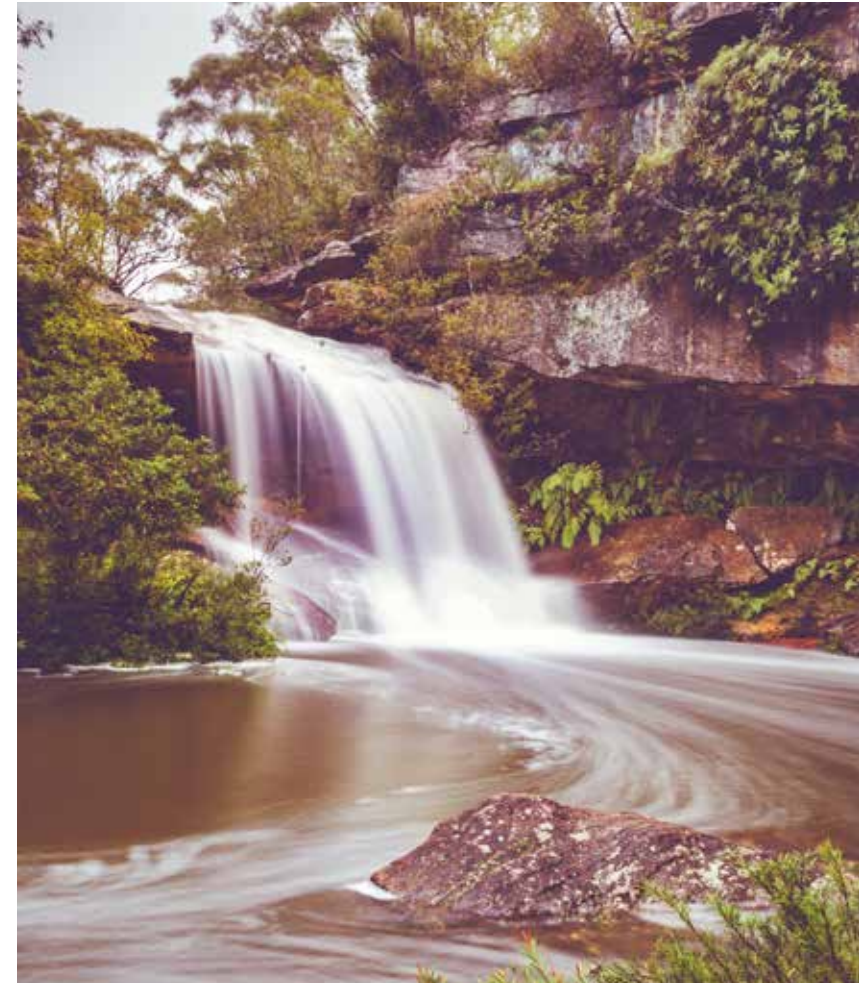
Our community is passionate about where they live, the natural amenity, the cultural heritage and the legacy we create for generations to come.

Overall, our community values the importance of the visitor economy and the vital role it plays in providing local employment and the benefits from investment in recreational assets that are enjoyed by locals and visitors alike.

One key challenge is the pressure our community feels from visitation during peak season. This highlights the important role, we as destination managers play, in ensuring the beauty and appeal of our extraordinary destination is protected and preserved.

Across all stages of consultation a number of consistent themes presented from the feedback including (in order of priority):

1. Impact of increasing visitor numbers.
2. Pressure on transport and parking.
3. Impact on the natural environment.
4. Limited range of visitor accommodation and impacts of short-term holiday lets.
5. Opportunities to improve recreational facilities for road and mountain biking.
6. Targeted marketing and visitor servicing.



Visitor Survey

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 the COVID-19 pandemic.

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

Figure 19
Origin of visitors

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

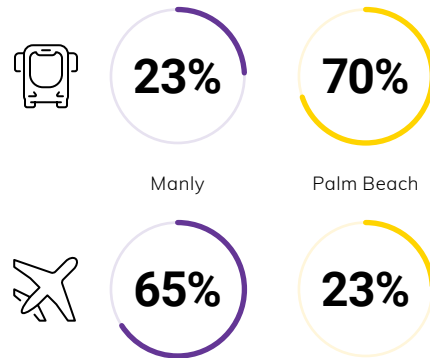


Figure 20
Visitor age

Visitors tended to be older in the 2020 Visitor Survey across both sites, with a spike (vs. previous years) in those aged 40-59. (Palm Beach) and 60-79 (Manly).

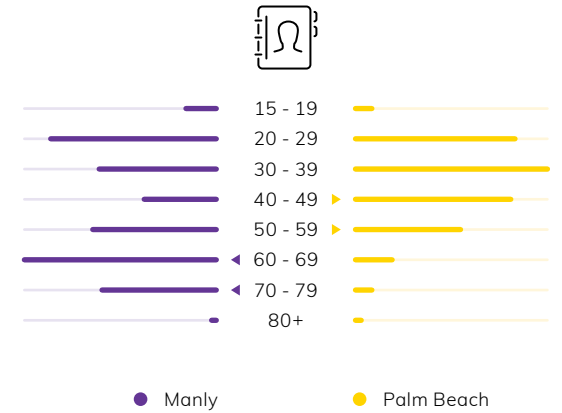


Figure 21
Residents sentiment towards tourism

Local residents were asked if they felt tourism positively contributed to the local area. The vast majority felt tourism had a positive contribution.

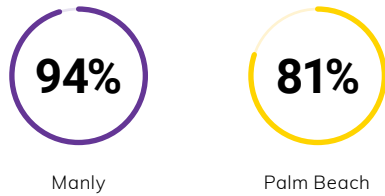


Figure 22
Where are they staying

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.

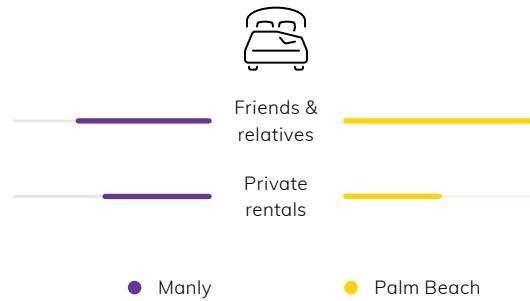
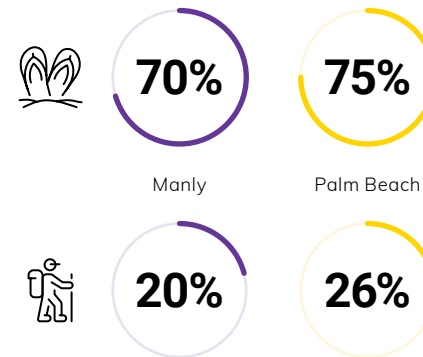


Figure 23
Reason for visit

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



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 24

Key findings identified through industry and community consultation

Strengths

- 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 (pre COVID-19 pandemic)
- Healthy Visitor Friends and Relatives (VFR) market

Weaknesses

- 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

Threats

- 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

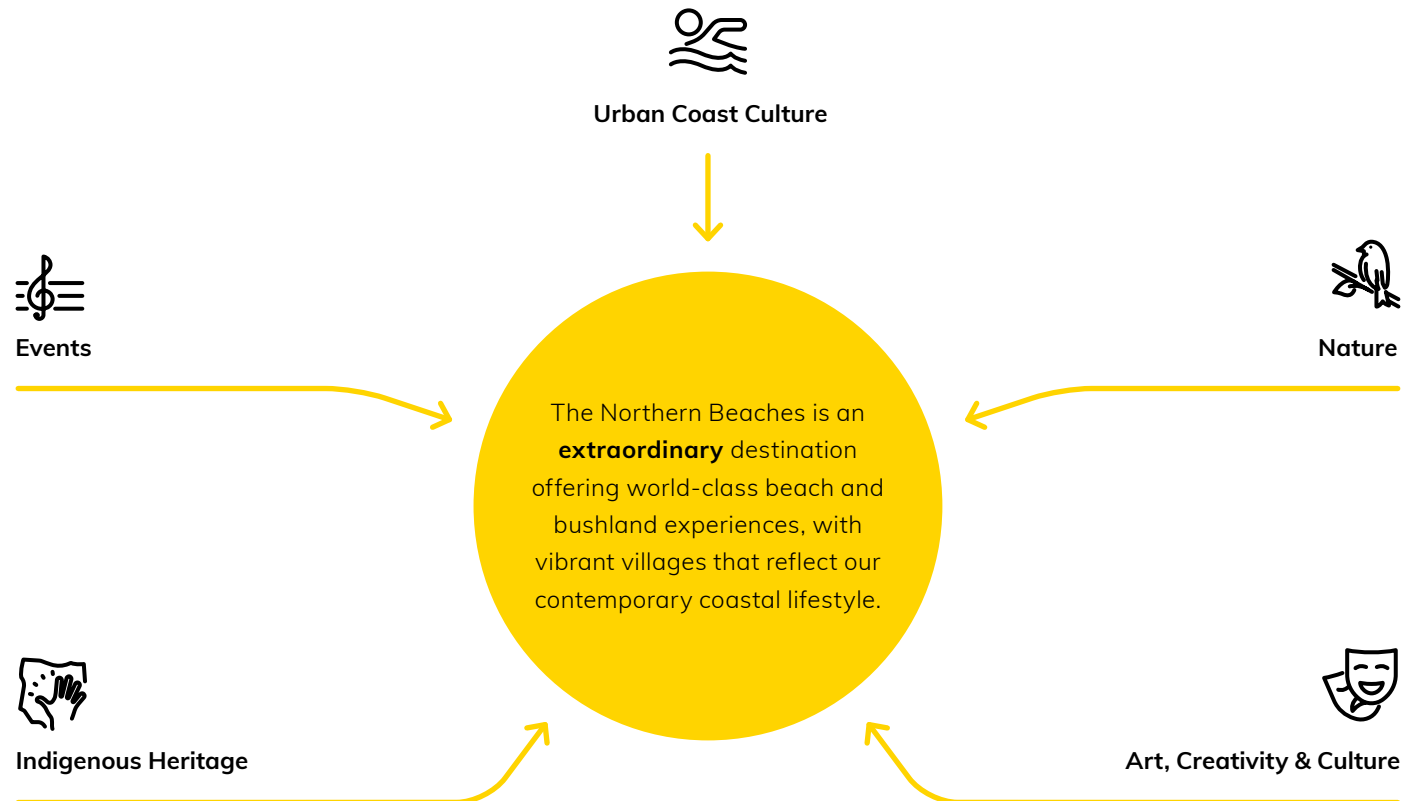
Opportunities

- 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, Tourism Australia and Manly Tourism & Economic Recovery Taskforce.
- Launch a dedicated destination website, involving industry partners
- Implement a new governance model with an industry-led focus
- Collaborate with NSW Aboriginal Tour Operators Council (NATOC) to engage and enable opportunities for Aboriginal-owned and operated experience development

Experience themes

Five primary visitor experience themes have been developed to capitalise on the strengths of the Northern Beaches and to tap into global trends in tourism. They represent a summary of experience offerings on the Northern Beaches and within each of the themes, are a number of supporting experiences that reinforce the competitive appeal and comparative advantages of the destination.

Figure 25
Northern Beaches experience themes





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 highly appealing to visitors from around Australia and abroad.

Northern Beaches Coast Walk

The Coast Walk is a signature Northern Beaches' experience spanning 36 kilometres from Manly to Palm Beach. The walk provides access to a spectacular stretch of NSW coastline and also connects to the Bondi to Manly walk. It is defined by dramatic headlands, peninsulas, bushland, rock platforms, lagoons, beaches and ocean views. It reflects the area's unique identity, character, history and lively community. Option to explore opportunities to package accommodation and experiences along the Coast Walk to create a multi-day iconic urban walk.

Creating extraordinary gateways

Manly and Palm Beach, each with its own character and experience offerings, are both extremely popular destinations for different visitor markets.

- **Manly** - A popular destination since the 1900s, millions of tourists seek out the ocean beach from the ferry, enjoying coastal walks, retail stores, dining experiences, entertainment and North Head for its abundance of nature and spectacular views.
- **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 a popular golf course, restaurants, boat hire as well as being arrival and departure point for the iconic seaplanes and ferries over to the Central Coast and Ku-ring-gai Chase National Park.

Celebrate the surf culture

Places along the coastline are connected by their surfing history and many intriguing stories that could be expressed in activities such as surf-themed sculptures, artworks and imagery. There is a great opportunity here to celebrate these stories by creating new and innovative experiences differentiating unique parts of the Northern Beaches, positioning it in line with competitor destinations.

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 the Coast Walk on its doorstep, opportunities exist to collaborate with local tour operators and develop experience-based itineraries to enhance the overall visitor experience.



Nature experience

The Northern Beaches is surrounded by bushland and waterways which provide a home to some of Australia's most iconic wildlife. All these factors make the Northern Beaches an incredible place to live, work, study or visit. Nature contributes to our health and wellbeing, as well as providing a setting for extraordinary experiences, all of which can be found on the doorstep of Australia's largest city. This provides a unique opportunity to showcase the qualities that motivate and attract people from all around the world to visit Australia.

North Head

Perched on the northern side of Sydney Harbour, North Head Sanctuary is a site of high ecological value. Comprising 74 hectares of bushland, it offers a variety of walking and bike trails to enjoy the flora and fauna, endangered species and spectacular views.

Waterways - Celebrating and connecting the waterways of the Northern Beaches

The waterways of the Northern Beaches are one of our greatest assets 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.

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. This type of accommodation experience complements the natural assets of the region.

The sky above

There are locations on the Northern Beaches where viewing the night sky is particularly rewarding. Whether through a telescope or the naked eye the Beaches has some of the best locations for an evening of star gazing and galaxy watching.

Off-road cycling

Off-road cycling is a growing market within the nature-based tourism sector and this niche is rapidly increasing in popularity. It can be an ecologically sustainable tourism experience encompassing social and recreational riding, touring, competition, cycling festivals and spectator events. Off-road biking reaps huge health and social benefits as it is outdoors in the fresh air amongst nature.

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 an abundance 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.

Currawong Beach Cottages

Currawong Beach Cottages on Pittwater is a Northern Beaches rustic holiday experience accessible only via boat or 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 and artists as its natural beauty, tranquillity and peacefulness make it a truly inspiring environment.



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.

Coast Walk Public Art Trail

The Coast Walk, as part of the Public Art Strategic Plan, will showcase temporary and permanent art activations and installations along the walk. Works reflecting Aboriginal, environmental and cultural stories will enrich the experience for both locals and visitors, contributing flow-on benefits to 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 and develop their practice and audience. Pre-COVID, approximately 33% of all visitors to the MAG&M were out-of-area and a large component of these were international visitors.

Creative Space at North Curl Curl

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

Glen Street Theatre

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

Artist retreats, 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. Creative art offerings such as overnight artist retreats, specialised workshops, boutique business events and experiences that engage local artisans and innovative industry leaders can all work together to create bookable experiences (weekends) to discover and get 'under the hood' of the destination.

North Head

The North Head precinct is an exceptional setting and opportunity for the region. It offers stunning views, a wealth of cultural heritage, artist studios and art installations. The North Head precinct is easily accessible from Manly village and offers a 'stage' for extraordinary experiences.

Science-based educational tourism. There is significant scope to feed inquisitive minds with surprising offerings such as citizen science and science communication experiences. These purposeful activities are both recharging and satisfying and show our community's commitment to drive home goals in the Environment and Climate Change Strategy: Protect. Create. Live. Businesses are often looking for staff retreats and team-bonding activities that encourage them to work together and focus on the bigger picture. The Northern Beaches region is well-positioned with some offerings already in this space and could develop this area to create bookable products and packages.



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 opportunity to explore the beauty and significance of rock art and to hear stories on the connection of Traditional Custodians to Country. These experiences offer insights that help shape our shared future as custodians of this extraordinary place.

Aboriginal Cultural Tourism

These experiences are on the rise, particularly with higher-yield markets. Integrating Aboriginal stories, language and heritage coupled with the extraordinary sites of significance, such as 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 such as studio trails, food trails, heritage walks, art and music events.

Indigenous experiences

Supporting indigenous-owned companies and encouraging collaboration with local businesses will grow awareness for this important sector.

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.



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. Individual and unique events put the Northern Beaches on the must-visit destination bucket list.

Multiple live site festivals and events

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.

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.
- 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.

Food and beverage events

Work with local food and beverage operators to promote the diverse range of food offered 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 to enable visitors to sample food and beverage offers across the region.

Business events

Manly offers a range of hotel and conference spaces to support boutique business events. These can attract midweek and all year round visitors, to address seasonality.

There is opportunity to extend stay to explore rest of the Northern Beaches with an increased focus on combining business travel with leisure (b'leisure).



The strategy

Strategic aim

We will balance developing a sustainable visitor economy with managing the impact of visitation. As destination managers we will protect our region and its key attributes, preserve our natural environment and uphold our community's way of life.

Our primary focus is the day trip and domestic overnight stay markets until international travel returns.

We will strive to increase spend per visitor (yield), rather than visitor numbers, to sustainably grow the visitor economy.

Our strategic aim will be achieved through increased focus on destination management.

The plan will deliver economic prosperity, support the creation of new jobs and enhance the lifestyle of our community.

Destination stretch target

Our stretch target is to double visitor spending over the next 5 years to 2026, bringing it in line with the Greater Sydney growth rate.



Goal 1

Focus on yield over volume!

Increase visitor expenditure to be comparable with growth in Greater Sydney

Convert domestic day trippers to overnight visitors

Aim to grow tourism in higher yield markets (i.e. Business sector)

Goal 2

Become the brand promise: Altogether extraordinary.

Deliver outstanding visitor services through innovative digital platforms

Support development of unique experience offerings

Create targeted marketing programs that promote pride in the local community and drive valued visitation

Goal 3

Making the region key to Sydney's place in the world.

Promote visitor understanding of environmental policies and support sustainable tourism

Collaborate with the community, key stakeholders and governments to target investment in experience offerings

Manage tourism related public spaces and facilities in peak season to promote wider enjoyment of the region

Focus areas

To achieve our strategic goals we will focus on two Strategic Priorities. This will ensure that through collaboration with our local industry, government and community our efforts and resources will be directed on those areas that will have the greatest impact.

Focus area 1

Destination management (strengthening supply, capacity and governance)

Disperse visitation

We will support the development of quality experiences that build on recreational assets throughout the region to spread the economic benefits and reduce pressure on key destinations during peak times.

Industry collaboration

We will work together with businesses, key stakeholders and state and federal government agencies to support cross-sector leadership and governance.

Product development

We will support our local businesses to expand the product base to promote quality and diversity of visitor experiences.

Transport and connectivity

We will plan and support improved physical movement access to and within the region and the impact on parking.

Environmental sustainability

We will help businesses become environmentally sustainable and deliver outcomes to benefit the region.

Planning and facilities

We will improve planning and coordination to support the region's capacity for seasonal impacts from visitation and the amenity of our open spaces.

Key: Each focus area will support achieving our goals

 Goal 1  Goal 2  Goal 3

Focus area 2

Destination marketing (shifting demand)

Attract business and major events

We will focus on attracting and developing events, including business events that drive overnight visitation in off peak seasons and mid-week.

Reduce seasonality

We will focus on marketing and promotion to drive visitation in shoulder and low season periods to support a sustainable visitor economy.

Brand and positioning

We will build on the Northern Beaches place brand to reflect the uniqueness and individual characteristics of our town centres and villages.

Visitor services, digital innovation and content

We will use data to inform and develop content and channels to engage visitors and ensure collaboration across third party channels to target value markets.



Support community engagement

We will continue to engage with our community to promote understanding of the value of the visitor economy.

Target high-value markets

We will focus on high value target markets and focus on increasing spend while managing a sustainable volume.

Key: Each focus area will support achieving our goals

 Goal 1  Goal 2  Goal 3

An aerial photograph of a coastal city during sunset. The sun is low on the horizon, casting a warm, golden glow over the scene. The city is built on a hillside overlooking the ocean, with numerous buildings and houses visible. The ocean is dark blue with white foam from the waves breaking on the shore. The text "Delivering the plan" is overlaid in white, bold, sans-serif font in the lower-left quadrant of the image.

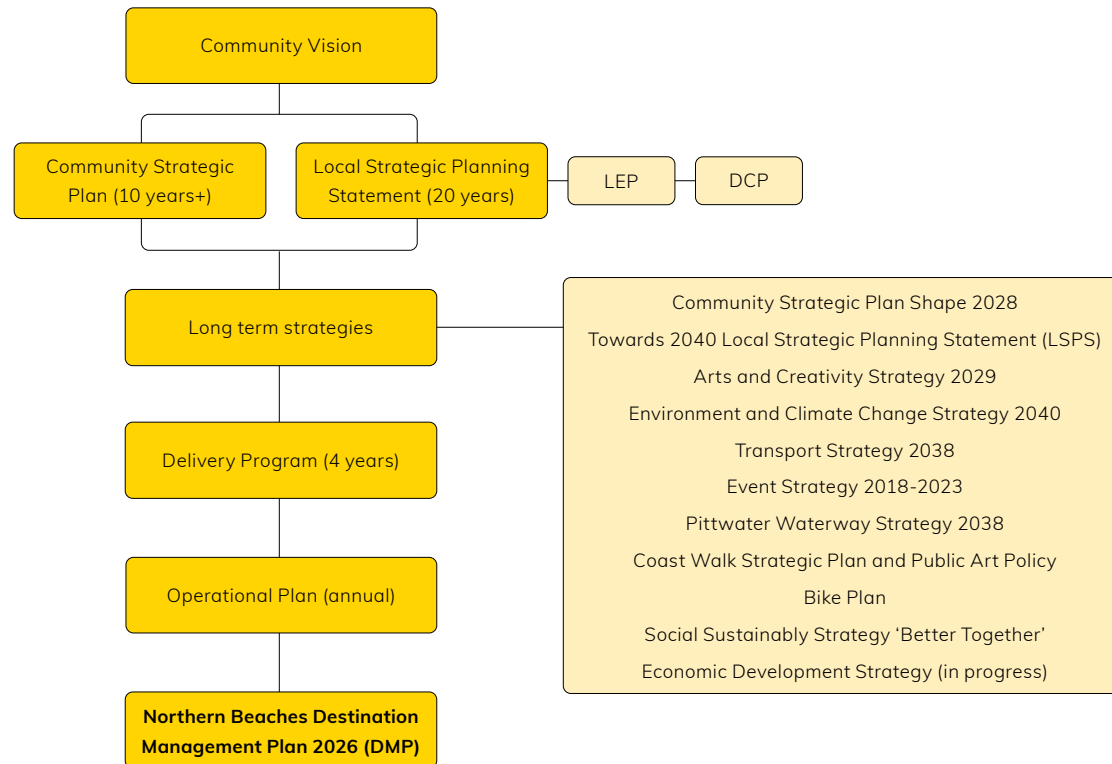
Delivering the plan

This Plan has been developed and informed by consultation, capacity building and a review process at a time when there is still great uncertainty in the global tourism industry. Delivery of the actions will need to be agile and responsive to changes in the industry over the next five years.

To promote effective governance and leadership to oversee and support delivery of Plan, it requires the establishment of a broad based industry and stakeholder Destination Management Group (DMG), led by Council.

Figure 26 shows the governance of the plan.

Figure 26
Northern Beaches Council - Plan Structure



Tourism industry development

Northern Beaches' tourism and hospitality 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 distribution-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. This can be done through learning about market trends and improvements in the delivery of quality services, products and experiences.

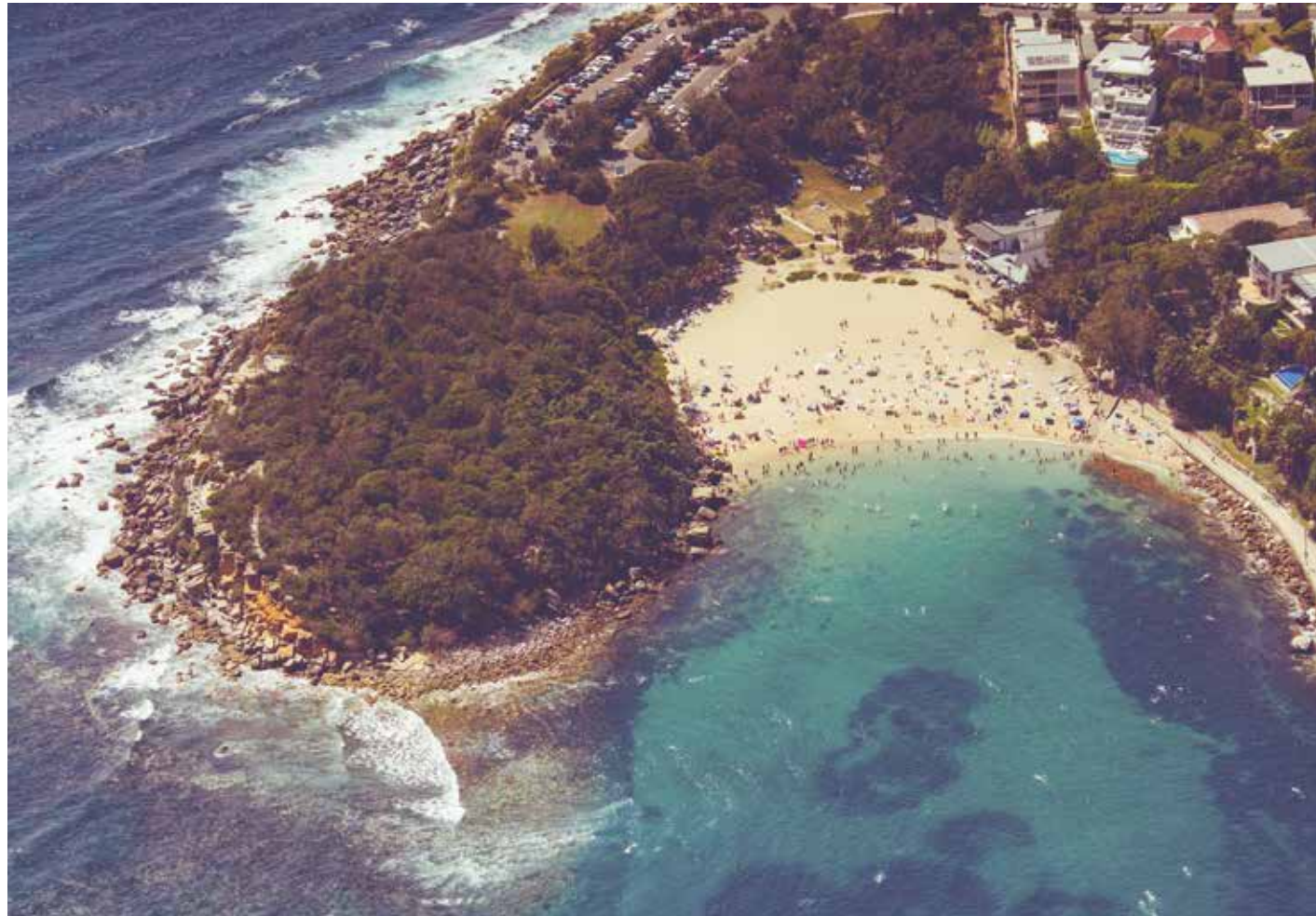
In partnership with local tourism industry, we will:

- Strengthen the Northern Beaches tourism industry network to grow with sustainability, authenticity and connection thereby boosting the tourism sector
- 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
 - Distribution ready. Tourism businesses with online reservation software and direct booking capability are better placed to reach both domestic and international visitor markets
- Building an understanding of 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 i.e. local business awards.

Image credit:
Destination NSW

- Providing an 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
- Encourage local businesses to participate in industry awards, where the industry celebrates success across the Northern Beaches while at the same time, the business benchmarks itself.



Destination management framework

To deliver this Plan we will work collaboratively to promote effective destination management focusing on enhancing product supply through industry development, promoting demand in high value markets through marketing and supporting a collaborative approach to destination leadership with community, local industry, business chambers and government agencies.

We will develop annual delivery plans aligned with the Plan. Annual evaluation and performance tracking will ensure the delivery of the Plan is in line with the strategic aim and focus areas.

Figure 27
Destination management framework

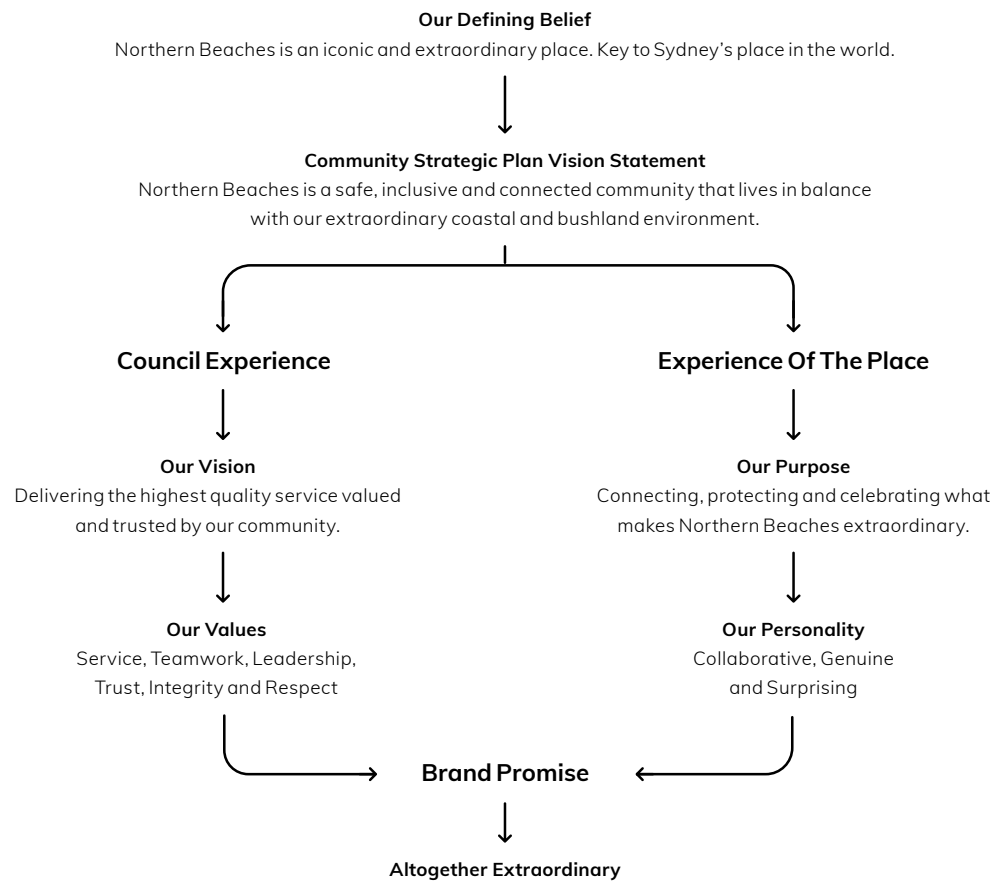


A destination's brand identity is the sum of all the stories about the destination and the experiences visitors have during their stay.

We know through consultation with our community in 2017 as part of the brand identity the values that underpin the Northern Beaches Council brand. Through it we seek to celebrate the special things that make our region extraordinary.

This has established a solid foundation to further develop the place brand and destination marketing strategy. We will create strong consumer messaging, build local pride and showcase the experiences that make the Northern Beaches extraordinary. This will drive our region's economic recovery and accelerate future growth.

Figure 28
Northern Beaches brand strategy



Place brand idea

Our place brand idea is at the heart of everything we do and embodies our brand promise, Altogether Extraordinary.

Place

Everyone who lives, works and visits the Northern Beaches knows that it is an extraordinary place. At the beach and in the bush, everyone is welcome and everyone has a story waiting to be heard. It's a community of people who love and are proud to be part of the area. At the heart of The Northern Beaches is our collaborative spirit, where people pitch in, contribute and support each other.

When people visit they are welcomed by the locals, and can choose from many immersive experience and places to explore.

Council

We all want to maintain what makes the Northern Beaches extraordinary. Our habitat, our culture, our sense of place. So even as it grows and develops, together we will protect what makes our place special. So that everyone in the future can love it as much as we do.

In the Northern Beaches, we're Altogether Extraordinary.



In collaboration with our key stakeholders, we will create and increase distribution of simple and compelling content to raise awareness and encourage dispersal across the region, highlighting the diversity of experiences between Manly and Palm Beach.

We will continue to work with the Manly Tourism and Economic Recovery Taskforce (TERT) to realise the opportunity to drive demand for Manly and the region as a top destination for visitors. We will focus on the local and domestic audiences who underpin a sustainable visitor economy well beyond the recovery phase.

Figure 29
Campaign model to drive demand

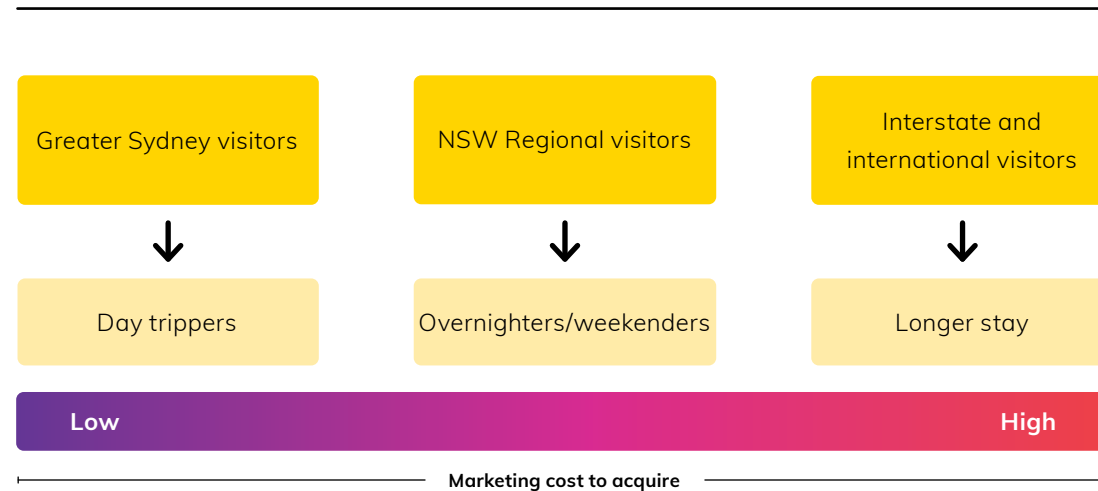


Figure 29 source:
Manly Tourism and Economic Recovery Taskforce (TERT)

Visitor services

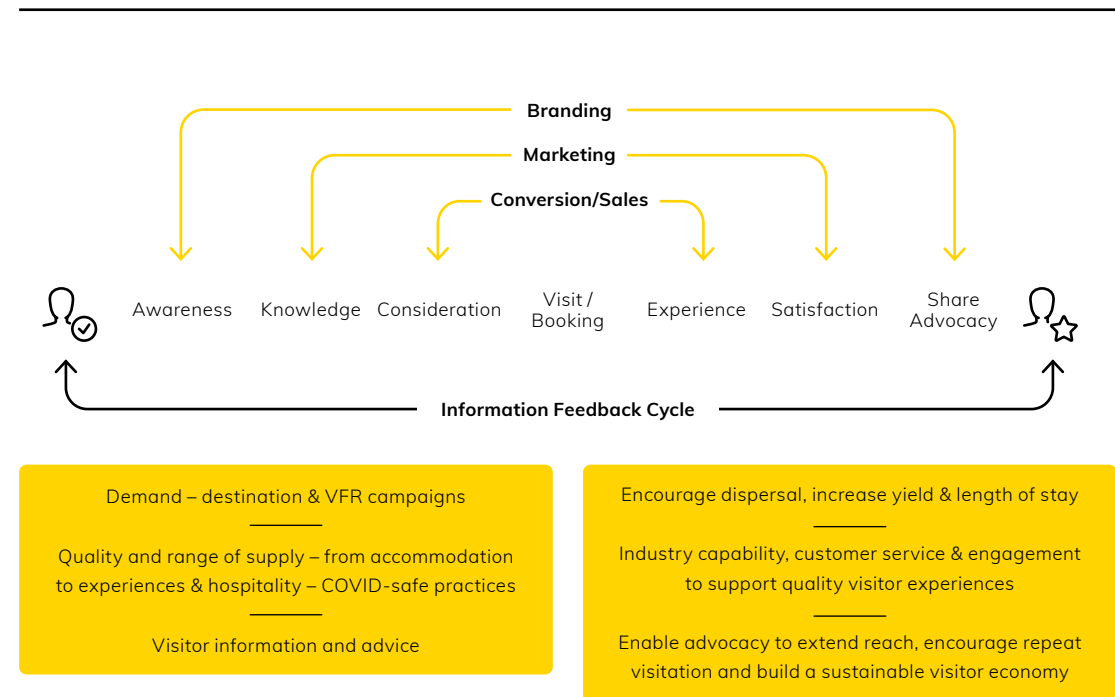
Visitor servicing is defined by all visitor interactions with a region, including:

- pre-visit (information and inspiration)
- in destination (in-trip discovery)
- post visit (reviews and advocacy).

We will improve visitor services over the next five years by developing a proactive approach in understanding the visitor journey, taking information to the visitor and aligning the physical and digital services to meet visitor needs in an ever changing tourism landscape.

The recommendations have been structured to respond to the various stages within and needs of the customer journey.

Figure 30
Understanding the visitor journey



We will prepare for a rebound in tourism by promoting our destination across all channels, addressing the quality and supply of experiences and products, creating and sharing remarkable content and enhancing the industry's capabilities and customer service standards.

We will ensure visitors better understand the region, have a seamless experience and can access more impactful visitor services.

We will do this by:

- understanding visitor touchpoints with the Northern Beaches
- creating an integrated digital website to promote experiences across the region
- implementing a Live Chat pilot project

- helping tourism experiences and products get market ready
- improving the experience visitors have face to face and online
- addressing transportation and connectivity across the region.

We know that when international travel resumes, Manly will once again be a key destination for many visitors who travel from Circular Quay, thus highlighting the need to have an active visitor service there.

The Manly Visitor Information Centre role will adapt to include the visitor journey be it pre-visit, during and post visit whilst still continuing to capture 'in destination' travellers, supporting bookings with local tourism and hospitality products. The team will continue to work closely with other operators around Sydney helping to drive visitation across the region.



Measuring success

Measuring performance of the visitor economy in the Northern Beaches is critical to understanding the success of implementing the Plan. This will be required to track progress on meeting the stretch target of doubling visitor expenditure by 2026.

We will continue to monitor community sentiment towards tourism on the Northern Beaches through ongoing resident surveys and engagement with key community groups. Visitor impacts on the surrounding natural environment will also be further explored.

We will annually monitor recovery and performance of the Northern Beaches economy by developing a range of indicators, in-line with the NSW Government's "NSW Visitor Economy Strategy", listed below:

- community satisfaction
- visitor expenditure (by domestic day and overnight)
- share of Gross State Product and Jobs
- average length of stay
- average yield (spend)
- repeat visitation
- investment in visitor infrastructure
- access to visitor attraction
- visitor satisfaction accommodation and experiences
- visitor attendance and economic impact with events.

Council will continue to work with Destination NSW to develop and monitor KPIs to understand the value of the visitor economy and community satisfaction, at a local level.

We will set specific local targets once domestic and international travel resumes and we better understand the capacity and rate of recovery of the tourism industry. This may include growth of total visitor spend, increase in number of visitor nights (international and domestic) and improvement in overall visitor satisfaction.














Action plan



Recover-Rebuild-Drive new business







Focus area 1




Destination Management (strengthening supply, capacity and governance)







Key Direct Action  Collaboration  Advocacy 




Destination Management	Responsibility	Priority
Industry collaboration		
Strengthen industry networks by facilitating a range of industry workshops (2 per year).		Moderate
Survey tourism operators annually to benchmark demand for tourism and hospitality services, gauging industry sentiment and need for ongoing support.		High
Encourage local operators to list their business on Australian Tourism Data Warehouse.		High
Continue to support and promote the Northern Beaches Business Award category of tourism operator.		Moderate
Consider a staged approach to create an industry-based tourism group for the Northern Beaches, including potential to expand on the existing Manly Tourism & Economic Recovery Taskforce.		High
Work with Council's Strategic Reference Group for Economic and Smart Communities to implement the DMP.		High
Engage with local tourism operators to help bring sustainability into the core of their business. Providing authentic, sustainable, connected experiences (i.e. swap out single-use plastics and be energy and water wise).		High
Implement regular tourism industry EDM to provide updates on key trends, helpful links, training and funding available.		Moderate
Planning and Facilities		
Coordinate actions across Council's business units to support the tourism industry and visitor economy (waste, transport, events, property, planning, open space and recreation etc).		High
Collaborate with Council staff to identify cleansing hotspots through data collection and implement improvements to inform future cleansing and waste services.		Moderate
Continue to provide additional cleansing and waste collection service on top of the standard frequency during the summer (November – March) and peak summer (December - February) during school holiday periods.		Moderate












Key Direct Action  Collaboration  Advocacy 



Destination Management	Responsibility	Priority
<p>Work collaboratively with numerous government land management organisations (such as National Parks and Wildlife) to provide coordinated planning of key visitor precincts, such as North Head and Ku-ring-gai Chase National Park.</p>		High
<p>Work with NSW Fisheries and Transport for NSW to plan for recreational uses around Pittwater Waterway including:</p> <ul style="list-style-type: none"> • Additional signage, web-based information and publications highlighting areas of interest, services and facilities • Review boat tie-up facilities and manage impacts of private water crafts • Explore opportunities for sustainable marina expansion 		High
<p>Advocate for NSW Planning to develop and implement the Short Term Holiday Rental (STHR) framework, including use of register to build knowledge on existing supply of short-term holiday lets across the Northern Beaches.</p> <p>Advocate to property owners and third-party letting agencies the need to improve visitor awareness around off-street parking, additional waste management options in peak seasons and impact of noise on close proximity residents.</p>		Moderate
<p>Through the Local Environment Planning Review (LEP) review.</p> <ul style="list-style-type: none"> • Consider expanding application of SP3-tourism to cover additional tourism assets. • Continue to support Tourist and Visitor accommodation land use across local and strategic town centres and retain as a permitted use in B2 and B4. • Consider a new local provision or 'Tourism Layer' to support a range of tourism-related planning controls within identified tourism precincts. • Retain provisions relating to the conversion of serviced apartments to residential flat buildings. 		High
<p>Work with Metropolitan Local Aboriginal Land Council (MLALC) to better understand appropriate land use opportunities on their land and to implement initiatives including tourism strategies.</p>		High
<p>Undertake a Place Plan for Manly which will include a focus on tourism, local and night time economy, street activations, recreation, signage/ wayfinding, key pedestrian movement corridors, public amenity and creativity.</p>		Moderate









Key Direct Action  Collaboration  Advocacy 

Destination Management	Responsibility	Priority
Transport and Connectivity		
Implement smart technology via a Park and Pay App to see real time parking availability directly on a mobile phone. Trial to begin in Manly 2021. Wider roll out across the LGA to follow.		Moderate
Annual review of Council's Pay and Display data which will give a snapshot of visitation as a means to monitor key locations, and review their demand to advocate for changes where appropriate.		Moderate
In peak seasons, utilise the overflow car park at Careel Bay to provide a shuttle bus service to Palm Beach.		Moderate
Collaborate with key stakeholders (i.e. Currawong Cottages, NPWS) to improve visitor awareness around access and parking options.		
Promote already established public transport options.		Moderate
Promote supporting electric transport (i.e. charging) for people who have electric cars.		
Work with Transport for NSW to: <ul style="list-style-type: none"> continue to plan for an extension of the B-Line to Newport. advocate for the integration of luggage and bike capacity on buses to encourage the use of public transport for visitors. 		Moderate
Investigate parking provisions at marinas, boating facilities, foreshore reserves and boat trailer parking facilities.		Moderate
Continue to advocate to Transport for NSW to retain the iconic Freshwater Class Manly Ferry to support local tourism.		High
Collaborate and advocate for the implementation of the Brookvale Structure Plan for shared path facilities to improve visitor experience around linking Brookvale breweries, accommodation, arts and culture industries.		High

Key Direct Action  Collaboration  Advocacy 




Destination Management	Responsibility	Priority
Disperse visitation		
Manly Dam mountain bike trail and planning is underway for further improvements		High
Feasibility work is ongoing and proposals for new and improved off-road cycling facilities will be exhibited for public comment through the upcoming draft Open Space and Recreation Strategy.		High
An audit of unauthorised trails at multiple locations is currently underway which may result in the formalising of some trails and the closure of others.		High
New facilities are being planned to better meet the needs of various riding styles, including additional bike parks and the potential for new trails.		Moderate
Implement the Bike Plan to support sustainable tourism and disperse visitors, including: <ul style="list-style-type: none"> Expand, improve and maintain the Safe Cycling and Road Cycle Networks Provide and maintain end-of-trip facilities 		High
Promote experiences throughout the region through a Northern Beaches wide destination website		High
Highlight the unique recreational and flora and fauna of our waterways, such as Manly Dam, Narrabeen Lagoon and Pittwater		Moderate
Work with National Parks and Wildlife Services to improve and promote bushland walking trails		Moderate
Encourage operators to package and promote 'hinterland' experiences, such as horse riding, golf and art and heritage, to encourage visitors to explore inland areas.		Moderate
Product development		
Work with existing and new commercial operators to develop and improve the visitor offering. Aligning with the goals to deliver new products and experiences and also the packaging of local experiences to lengthen duration of stay. For example, packaging up Coast Walk (and Public Art Trail) experiences.		Moderate
Encourage uptake of Destination NSW industry programs such as Get Connected to help local tourism operators develop and promote their products.		Moderate












Key Direct Action  Collaboration  Advocacy 


Destination Management	Responsibility	Priority
Develop and support Aboriginal cultural tourism in partnership with local Aboriginal community and organisations, including sharing grant opportunities.		Moderate
Prioritise investment in Council-owned or managed accommodation sites such as Currawong Cottages and Sydney Lakeside Holiday Park in Narrabeen, to service demand for nature-based and coastal holidays by the domestic leisure market.		
Continue to invest and implement the 2015 Currawong Conservation Management Plan, including stronger links and access to the experience offering of Pittwater and Ku-ring-gai Chase National Park from Currawong.		High
Continue to work with Councils and all parties to identify, plan and develop upgrades to new accommodation options at Sydney Lakeside Holiday Park.		
Identify suitable sites that may be available for nature-based experience accommodation such as pop-up glamping experiences.		High
Explore opportunities to celebrate Manly and Narrabeen's status as a World Surfing Reserve through surf-theme public art and exhibitions and accommodation.		Moderate
Environment sustainability		
Encourage local tourism operators to join Council's Sustainable Business Network and seek eco-tourism accreditation to help bring sustainability into the core of their business. Providing authentic, sustainable, connected experiences (i.e. swap out single-use plastics and encourage energy, water wise and recycling practices).		High
Assist with implementation of Council's Bushland and Biodiversity Action Plan to create sustainable visitor experiences.		Moderate
Implement the Environment and Climate Change Strategy to support sustainable tourism, including: <ul style="list-style-type: none"> • improve and manage sustainable recreational access whilst protecting environmentally sensitive lands • consider scenic and cultural landscapes and heritage in strategic land-use planning, development controls and when undertaking works (i.e. Northern Beaches Coast Walk). 		Moderate
Investigate with Centre of Clean Air Policy (CCAP) to see whether they have any monitoring data that they have any monitoring data we could quantify the environmental impacts of tourism		Moderate










Focus area 2

Destination Marketing (shifting demand)

Key Direct Action  Collaboration  Advocacy 

Destination Marketing	Responsibility	Priority
Visitor services, Digital innovation and Content		
Develop a Visitor Services Strategy based on data gathered through visitor journey mapping and research, focused on driving longer stays, increasing the number of repeat visits and supporting the development of a year round visitor economy.		High
Develop a seamless visitor services experience supported via an omni-channel approach focused on innovative digital technologies online, mobile and/ or brick-and-mortar store.		High
Find the best approach to coordinated visitor centre operations to ensuring ongoing analysis and sharing of visitor services data and performance metrics, creation of consistent key messaging and ongoing support for strong partnerships between visitor services, key stakeholders and the tourism industry.	 	High
Investigate and deliver a pilot program implementing Live Chat and other digital visitor services.		Moderate
In response to visitor journey research, investigate and create a dedicated destination website which: <ul style="list-style-type: none"> recognises local diversity across the region. assists with dispersal of visitors highlighting connectivity and access. highlights the region's aims to become a sustainable destination. 		Moderate
Reimagine the Manly Visitor Information Centre (VIC) and 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 marketing including social media (Instagram, Facebook, Messenger etc).		High
Brand and Positioning		
Develop a destination brand identity that revolves around the Northern Beaches reputation, and that builds on the Northern Beaches place brand, reflecting on the distinctive characteristics that make our villages and places unique.		High
Continue to collaborate with Manly Business Chamber and the Manly Tourism & Economic Recovery Taskforce to support development of the destination brand position of Manly and marketing/ promotion of the Manly experience.	 	High
Continue to advocate to Destination NSW to promote Northern Beaches as a premier visitor destination		High

Key Direct Action  Collaboration  Advocacy 

Destination Marketing	Responsibility	Priority
Reduce seasonality		
Implement off-season campaigns:		
<ul style="list-style-type: none"> targeting visitors during mid-week, low and shoulder seasons. targeting Visiting Friends and Relatives (VFR) international and domestic market to arrive off-peak season. 		High
Attract business and major events		
Encourage the midweek b-leisure market (combining business travel with leisure time). Focusing on small scale group conferences (up to 200 people) leveraging available regional facilities and boutique conference venues and group leisure experiences.		High
Develop and support multi-day events across the region:		
<ul style="list-style-type: none"> extend events over a weekend, week or month to encourage length of stay. attract major third party destination events that showcase our extraordinary experiences. align events with the Experience themes: Nature, Urban Coast Culture, Indigenous Heritage, Art and Creativity. 		High
Support community engagement		
Enhance community awareness of social and economic benefits of visitors, including monitoring of visitor expenditure		High
Continue to survey community sentiment in a two-year visitor survey		High
Target high-value market		
Promote the region to special interest groups, such as golfing or cycling tours, artist retreats and destination weddings.	 	High
Target the 'Active 55+' and 'Contemporary female travellers' markets who tend to spend higher.		High
Monitor change in visitor expenditure and progress towards 'stretch target' to grow visitor expenditure in-line or above Sydney average		High



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 arrangements.

Export ready: Tourism products that are available for distribution partners to sell, for example, third party distributors or trade sales partners such as inbound tour operators (ITO's), wholesalers and online travel agents (OTA's).

Free and Independent Travellers (FIT):

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

High-yield markets: Travellers who have the propensity or capacity to spend more money on their holidays or during their 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

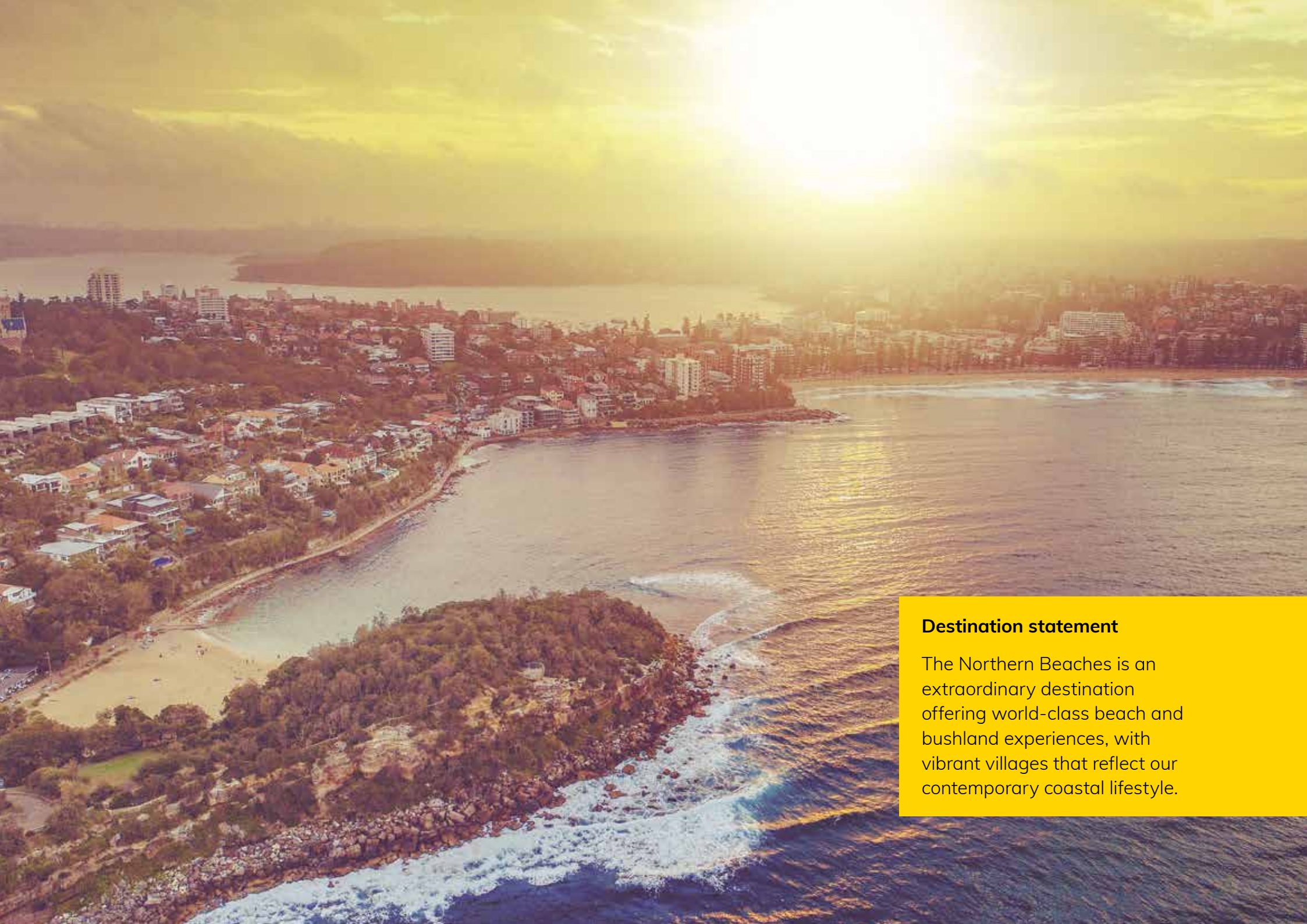
experiences: 'Product' refers to any tourism service or combination of services that can be offered to the market for sale, use or consumption. This includes physical objects, services, people, places, organisations and ideas. Tourism operators can create packages by partnering with transport services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

Visitor economy: The term 'visitor economy' refers to the production of goods and services for consumption by visitors. This 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.

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.



Destination statement

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

