Destination Northern Beaches. COVID Recovery Plan
Visitor Economy 2020 - 2022
Introduction and context in a time of COVID-19

Considerations relating to COVID-19 are:

1. It is highly likely that international tourism will take a significantly longer time to return, including for the inbound International Visiting Friends and Relatives (IVFR) market.

2. It is also highly likely that the VFR market will be at the forefront of the domestic tourism rebound. Additionally, an increase in small groups of close friends or family travelling together is anticipated. In the early stages of the rebound, a majority of travel markets will seek short breaks, including long weekends away, especially within a two to three-hour radius of home.

3. Given that social isolation and work/education from home were primary measures taken nationally, many people across all demographics are now active and engaging in digital platforms more than ever before. It has increased familiarity with online and digital environments, including for face-to-face social networking and direct communication. This means that into the future, online channels will be even more important as a means to reach, inspire, engage and connect with an audience. E-commerce is now essential not a ‘nice to have’.

4. As the pandemic resolves and travel is again permitted, the competition will be fierce among destinations, tour companies and hospitality providers. Many will likely try to compete on price. It is critical that to stand out from the crowd, Destination Northern Beaches needs to build and strengthen its emotional connection as well as its product offering to win both hearts and minds.

5. Beyond competition, there are other challenges that destinations will face, including:
   a. Over-tourism to popular areas, especially on the coast during the summer holidays;
   b. Community backlash resulting from peak visitation and high demand for facilities and services;
   c. Dispersal of visitors within the region not just out of the CBD, especially given the desire to avoid cities under COVID-19 circumstances. This includes access and transport as well as parking and other limiting factors;
   d. Lack of preparedness or capability of tourism and hospitality businesses to cope with the high volume of demand likely to result from the recovery of domestic tourism while complying with COVID-safe practices; and
   e. Enriching content to inspire and convert interest to a visit and that meets the changing expectations of the market.

These insights inform this recovery plan, aiming to be future-focused and responsive to new and emerging visitor behaviours resulting from the extraordinary circumstances created by the COVID-19 pandemic.

Footnote: Insights are drawn from a wide range of research both within Australia and globally. This includes recent research by Tourism Australia measuring Australians interest in and intent to travel domestically as well as research from third-party providers including Deloitte Access Economics. The Domestic Tourism Market and 2021 with a monitor global trends relating to travel and tourism.
Implications for Destination Northern Beaches
While the implications of COVID-19 on the visitor economy are significant, they also highlight important trends in travel and tourism that were already relevant for the Northern Beaches. These trends informed the draft Northern Beaches Destination Management Plan (NDMP) and create a strong foundation for setting directions both during the recovery phase as well as ensuring the Northern Beaches are positioned as a destination of choice into the future.

It is clear that now is the time to further strengthen the Northern Beaches’ community of supporters, as well as engagement with loyal visitors and the Northern Beaches’ community of supporters, as well as greater regional dispersal, among other outcomes such as demand management.

In short, it is time to prepare for a rebound in tourism. Whether this is promoting your destination across all channels, addressing the quality and supply of experiences or products, creating and sharing remarkable content or enhancing the industry’s capabilities and customer service standards. Focusing on the local and domestic audience now will also underpin a sustainable visitor economy well beyond the recovery phase.

As highlighted above, the use of online and digital platforms for personal and professional interactions during the COVID-19 pandemic has increased significantly with the local and domestic audience. The implication is that there is a significant increase in travel segments that rely heavily on the use of online and digital platforms for a range of functions, from sourcing visitor information through to online booking. This trend in customer expectations had been rapidly increasing over recent years; it will now accelerate and involve all market segments and demographics.

Another trend that is likely to strengthen is the desire or expectation for tailor-made itineraries and experiences that match the interests, motivations or behaviour of the customer, especially as competition between destinations increases in the aftermath of COVID-19. This could cover special interest or niche markets such as nature-based activities (from kayaking to multi-day walks), health and well-being itineraries and sporting events through art and culture and food and drink as well as the inter-relationships between them. This is about enriching and creating remarkable content that brings depth to the experience offered and encourages dispersal within the region.

Higher yield or bespoke itineraries could be created for potential visitors, with bookings made for a range of functions, from sourcing visitor information through to online booking. This trend in customer expectations had been rapidly increasing over recent years; it will now accelerate and involve all market segments and demographics.

Some of the challenges identified above relate directly to the Northern Beaches. Given the interplay between a desire to travel within 2-3 hours of home and the corresponding commercial and financial impacts, it will be critical to get the balance right.

This can be achieved in several ways, including enhanced visitor information and services, operational and logistics management as well as improved targeting of promotional efforts to the VR and/or higher-yield markets. All these strategies should be designed to encourage a shift towards overnight stays as well as improved targeting of promotional efforts to the VR and/or higher-yield markets.

A bold and clear strategy will also be important. Notwithstanding this, the desire for day trips to the beach and other water-side locations will be very high. This will impact on access to local facilities and services, from parking to public transport and hospitality. There are also likely to be behavioural implications that arise from over-crowding and frustration with queuing or lack of capacity. As a key consideration for local businesses, it will be necessary to focus on delivering a truly memorable visitor experience while also leading to a greater level of community acceptance and involvement in tourism. In the short-term, measures to address peak demand pressures will be required while also assisting the hospitality and tourism industry to cope with these impacts within the COVID-safe manner.

In addition, people’s desire for short-term holiday retirement accommodation in likely to increase. This will benefit the far Northern Beaches due to the relatively higher inventory of this style of accommodation over other forms of accommodation. However, when coupled with the research highlighting the desire of many markets for a coastal holiday, there will be even more pressure on local facilities and services while also leading to a greater level of community acceptance and involvement in tourism. In the short-term, measures to address peak demand pressures will be required while also assisting the hospitality and tourism industry to cope with these impacts within the COVID-safe manner.
A final consideration is that the Northern Beaches Council has prepared a COVID-19 Summer Action Plan for Outdoor Public Spaces. This plan will inform a whole-of-Council approach to implementation of COVID-safe experiences and practices in the lead up to and during the summer 2020/21 season, otherwise, some initiatives identified in this strategy may require a joint approach with the NSW Government towards recovery of the visitor economy, including the night-time economy as well as appropriate management of public health within public spaces, hospitality venues and accommodation. It will be critical to continue monitoring social distancing and other restrictions that respond to the COVID-19 pandemic. In doing so, this strategy also enables flexibility to adapt to any easing of COVID-19 restrictions as advised by the NSW Government’s Chief Medical Officer.

It is critical to ensure that a long-term approach to creating a sustainable visitor economy is not overly influenced by responding to short to medium term challenges and circumstances. As a result, this recovery plan and accompanying longer-term draft Destination Management Plan (Destination Northern Beaches: Creating a Sustainable Visitor Economy), aims to find a balance between preparing for and managing the recovery phase while identifying those actions that deliver sustainable outcomes for the visitor economy.

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

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Recommendations for recovery 2020 to 2022

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

![Image](image-url)

- **Potential Visitor**
  - Demand – destination & VFR campaigns
  - Potential visitor awareness

- **Awareness**
  - Quality and range of supply – from accommodation to experiences & hospitality – COVID-safe practices

- **Knowledge**
  - Visitor information and advice

- **Consideration**
  - Encourage dispersal, increase yield and length of stay

- **Action**
  - Industry capability, customer service & engagement for support quality visitor experiences

- **Information Feedback Cycle**
  - Enable advocacy to extend reach, encourage repeat visitation and build a sustainable visitor economy

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Figure 1

- Demand – destination & VFR campaigns
- Quality and range of supply – from accommodation to experiences & hospitality – COVID-safe practices
- Visitor information and advice
- Encourage dispersal, increase yield and length of stay
- Industry capability, customer service & engagement for support quality visitor experiences
- Enable advocacy to extend reach, encourage repeat visitation and build a sustainable visitor economy
Now: COVID-safe

2021: Rebound to Recover

2021/22: Driving New Business

High-level goals:
- Build awareness of a single, unifying identity for Sydney’s Northern Beaches
- Transition from day-visitor to overnight visitors and encourage greater regional dispersal
- Increase yield, length of stay and repeat visitation
- Address sustainability: increase visitation during low and shoulder seasons
- Increase awareness of the core proposition and offering of the Northern Beaches (extraordinary experiences in a vibrant, nature-based and wellness setting)
- Respond to COVID-safe practices and evolving market trends, desires or expectations

Principles:
- Take action by implementing initiatives in a staged approach
- Focus on the local residents initially to rebuild a sense of vibrancy and contribute to growing activity for the Northern Beaches
- Recognize that collaboration is key to success

Shifting demand
- One voice - reinforce unifying Northern Beaches identity while maintaining personality of places & precincts
- Create and disseminate remarkable content – safe, simple & compelling – enables access for businesses to access & share
- Implement a ‘visiting friends & relatives’ (VFR) program - local loyalty + reconnect
- Implement a destination campaign focused on high-yield markets
- Internal model to focus information service for peak periods

Strengthening supply
- Develop and promote COVID-safe experiences and demand
- Reform regulatory and approvals process and ease social restrictions to encourage greater outdoor dining and experiences to enable vibrant communities and spaces

Capability of industry
- Immediate focus on capability and preparedness for COVID-safe practices and increased demand over the summer season, including advice on best practice and customer service techniques
- Strengthen industry networks to enhance collaboration
- Survey to benchmark demand for tourism and hospitality services
- Develop a comprehensive, tailored and ongoing industry capability development program with support services for evolving
Recommendations

1.1 Identify one voice: Build awareness of a single unifying brand identity for Northern Beaches across all channels as a destination of choice.

1.2 Establish a single destination vehicle and dedicated social media channels that are visitor-focused and offer an easy way for visitors or potential visitors to find out more about the destination.

1.3 Implement a campaign for local community and OTR market leading to a research: Launch FieldFlicker (2021).

1.4 Implement a campaign targeting high-yield markets to drive mid-week, low and shoulder seasons. Launch in (2021-2022).

1.5 High priority is to curate a COVID-safe series of experiences, from outdoor dining to top spots to picnic and great nature walks. Ensure compliance with the New South Wales COVID-19 Summer Action Plan for Outdoor Public Spaces.

Notes for implementation or activation

- When I said implement, I mean visit web pages as a sketch for visitor servicing and activations, on all visitor-critical stages in refreshing the digital and online presence of the Northern Beaches.

- Integrate single technology interventions, such as Augmented Reality (AR) and QR codes to content in a tour of content and digital assets.

- Maintain the Hello Manly website for visitor information services. However, ensure links to the region wide destination marketing platforms. This should consider the ongoing stages of transitioning the Hello Manly Facebook and Instagram pages into the VisitNorthernBeaches sites.

- Develop an immersive content calendar and create compelling content to bring to life the personalities of the villages, places and attractions. Focus on regional dispersal and raise awareness of COVID-safe things to see through to solutions to key challenges for visitors during peak periods.

- Encourage local businesses to share new content through their channels and to follow and like VisitNorthernBeaches social media channels, consider leveraging user generated content.

- Ensure collateral includes easy to read and easy to use itineraries that profile a range of things to do within specified timesframes e.g. half day, full day, two days. Integrate content from private sector providers whose appropriate for the experience being curated.

Recommendation Notes for implementation or activation

Shifting Demand – Marketing

2.1 Manage the Hello Visitor Information Centre (VIC) and create a single multi-channel centre. This is to allow all enquiries across all available channels. Have an email list. Link Check online and digital including social media (Facebook, Messenger etc)

Notes for implementation or activation

- Implement mobile Visitor Information Services for reach holidays where they are taking peak sessions and events to weed out those who don’t. Deliver this as a concierge service and consider the viability of attracting volunteers to deliver this service.

- Ensure collaboration and distribution of simple and compelling content to encourage regional dispersal and raise awareness of COVID-safe things to see through to solutions to key challenges for visitors during peak periods (e.g. avoiding crowded spots).

- Deliver content to meet the expectations of a contemporary audience – they are looking for to-the-point, relevant and tailored content across a range of channels (from digital to print).

- Engage local businesses and retailers, clubs and real-estate agents to deliver appropriate.

Shifting Demand – Visitor Services

2.2 Reimagine the Manly Visitor Information Centre (VIC) and create a single multi-channel centre.

Notes for implementation or activation

-僧人There is a list of instructions on how to optimize visitor experience, with a focus on creating a single unifying brand identity across all channels. The recommendations include:

1. **Identify one voice:** Build awareness of a single unifying brand identity for Northern Beaches across all channels as a destination of choice.
2. **Establish a single destination vehicle:** Create dedicated social media channels that are visitor-focused and offer an easy way for visitors or potential visitors to find out more about the destination.
3. **Implement a campaign for local community:** Develop a campaign targeting high-yield markets to drive mid-week, low, and shoulder seasons.
4. **High priority:** Curate a COVID-safe series of experiences, focusing on outdoor dining, picnics, and great nature walks.

**Notes for implementation or activation:**

- Visit web pages to sketch for visitor servicing and activations.
- Integrate single technology interventions, such as Augmented Reality (AR) and QR codes.
- Maintain the Hello Manly website for visitor information services, ensuring links to region-wide destination marketing platforms.
- Develop an immersive content calendar and create compelling content to bring to life the personalities of the villages, places, and attractions.
- Create easy-to-read and easy-to-use itineraries for various timeframes.

**Shifting Demand – Marketing**

1. **Manage the Hello Visitor Information Centre (VIC):** Create a single multi-channel centre.
2. **Establish a campaign targeting high-yield markets:** Drive mid-week, low, and shoulder seasons.
3. **High priority:** Curate COVID-safe experiences focusing on outdoor dining, picnics, and nature walks.

**Notes for implementation or activation:**

- Implement mobile Visitor Information Services.
- Ensure collaboration and distribution of content to encourage regional dispersal.
- Engage local businesses and retailers to deliver appropriate content.

**Shifting Demand – Visitor Services**

1. **Reimagine the Manly Visitor Information Centre (VIC):** Create a single multi-channel centre.

**Notes for implementation or activation:**

- Implement mobile Visitor Information Services.
- Ensure collaboration and distribution of simple and compelling content to encourage regional dispersal.
- Engage local businesses and retailers to deliver appropriate content.

The recommendations are aimed at optimizing the visitor experience by creating a consistent brand identity, improving digital presence, and curating COVID-safe experiences.
**Stronghold Supply**

3.1 Develop and grow COVID-safe experiences and activities. Outdoor recreation, accommodation and dining, nature-based and wellness experiences should be the highest priority.

Implementation should be informed by Council’s COVID-19 Safest Action Plan for Outdoor Places. Options to be trialled will include nature-based tourism, such as nature-based glamping.

3.2 Council to reform the regulatory and approval processes to encourage greater outdoor dining and live music, utilising NSW Government’s streamlined application process for alfresco dining to encourage pop-up bars and events to occur in a manner that is appropriate and COVID-safe.

As above. In addition, consider the fast track of trial initiatives such as outdoor dining premises’ offering services such as The Currin. Temporarily used parks and other open spaces.

3.3 In line with the NSW’s Beaches COVID-19 Secure Action Plan for Beaches and Public Spaces, implement customer-centric demand management initiatives. Consider ways to support local businesses, especially hospitality and accommodation providers, through high-demand parking or transport initiatives.

As above. In addition, implement a trial for improved use of spaces such as in The Currin, Careel Bay and Palm Beach, as well as pop-up kiosks, among other things.

3.4 Plan for small-scale and boutique events and promote workshops and masterclasses, including through linking to multiday itineraries.

Plan and promote more frequent series of small-scale events that utilise local venues or outdoor spaces in a COVID-safe way. This should involve collaboration with local businesses.

3.5 Implement State Government’s Streets as Shared Spaces program, which seeks to promote the health of local economies and increase green public spaces.

Trial Streets as Shared Spaces program to test community support and industry benefit.

3.6 Prioritise investment in Council-owned or managed accommodation sites such as Currawong and Lakeside Holiday Park in Narrabeen, to service demand for nature-based and coastal holidays by the domestic leisure market.

While a longer-term outcome will be achieved, planning and implementation of investment in council-owned and managed accommodation sites will need to be considered as a priority.

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**Industry Capability & Preparedness**

4.1 Increase focus on industry preparedness by providing regular communications with updates on key trends and best practices relating to COVID-19 as well as highlighting the benefits of key business owners.

Implement a regular tourism industry e-newsletter.

4.2 Strengthen industry networks to enhance collaboration. Consider workshops with Destination NSW and promote programs such as Get Connected to help local tourism operators develop and promote their products.

4.3 Conduct another business survey to benchmark demand for tourism and hospitality services. Building on the 2020 Tourism Industry Survey, conduct a follow-up survey to gauge industry sentiment and need for ongoing support.

4.4 Pilot a tourism industry capacity building program (Trainers in Schools) and develop a more comprehensive, tailored and responsive capability development program for local operators.

Trainers in Schools have developed a Marketing Mentoring Program for the Northern Beaches which will support Trainers’ Operations through mentoring, training and empowering them to take on active roles to develop and market experiences to the domestic and international market.

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**Recommendations**

**Notes for implementation or activation**

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