

# Destination Northern Beaches. COVID Recovery Plan

Visitor Economy 2020 - 2022



northern  
beaches  
council

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**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 both 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 **online 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 starts 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 back-lash 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, ensuring it is future-focused and responsive to new and emerging visitor behaviours resulting from the extraordinary circumstances created by the COVID-19 pandemic.

<sup>1</sup> 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 (for the domestic tourism market) and SKIFT who 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 tourism and travel that were already relevant to the Northern Beaches. These trends informed the draft Northern Beaches Destination Management Plan (DMP) 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 engagement with loyal visitors and the Northern Beaches' community of supporters, as well as build awareness of the destination, especially with those market segments who are the most likely to be interested in a visit to the destination. This involves understanding and responding to the interests, motivations and behaviour of our target audience and market segments.

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 familiarity with these platforms. The implication is that there is a significant increase in people's expectations about 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 tailored or curated 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 to art and culture and food and drink as well as the inter-relationships between them all. This is about enriching and creating remarkable content that brings depth to the experience offer and encourages dispersal within the region.

**Higher-yield or bespoke itineraries** could be created for potential visitors, with bookings made for a range of services from guided experiences or masterclasses through to accommodation and hospitality. Likewise, local experts would be able to assist in providing local tips and developing more remarkable content for distribution (especially across digital and online channels), such as hints on what to pack, favourite spots or hidden gems.

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 over-tourism impacts, it will be critical to get the balance right.

This can be achieved in several ways, including enhanced visitor information and servicing, operational and logistics management as well as improved targeting of promotional efforts to the **VFR and/or higher-yield markets**. All these strategies should be designed to encourage a shift towards overnight stays as well as greater regional dispersal, among other outcomes such as demand management.

A critical issue to consider will be the way in which the recovery impacts or affects different areas across the LGA. For example, given that people either won't be able to travel overseas or inter-state or will be less willing to do so, demand over peak periods in Manly and other popular centres such as Avalon are likely to be at unprecedented levels, especially during the summer school holidays. This also highlights the challenge of seasonality and weather that impacts the Northern Beaches and year-round visitation. **Encouraging low and shoulder season travel 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 and the use of local facilities and services, from parking to public transport and hospitality. There are also likely to be behavioural implications that arise from overcrowding and frustration with queuing or lack of capacity. A key consideration for local businesses will be preparedness for these circumstances. Some of these issues are already being felt in many destinations along the NSW coast and will only increase as we approach summer.

In addition, people's desire for short-term holiday rental accommodation is 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 disenfranchisement with tourism. In the short-term, measures to address peak demand pressures will be required while also assisting the hospitality and tourism industry to prepare for these impacts within a COVID-safe manner.

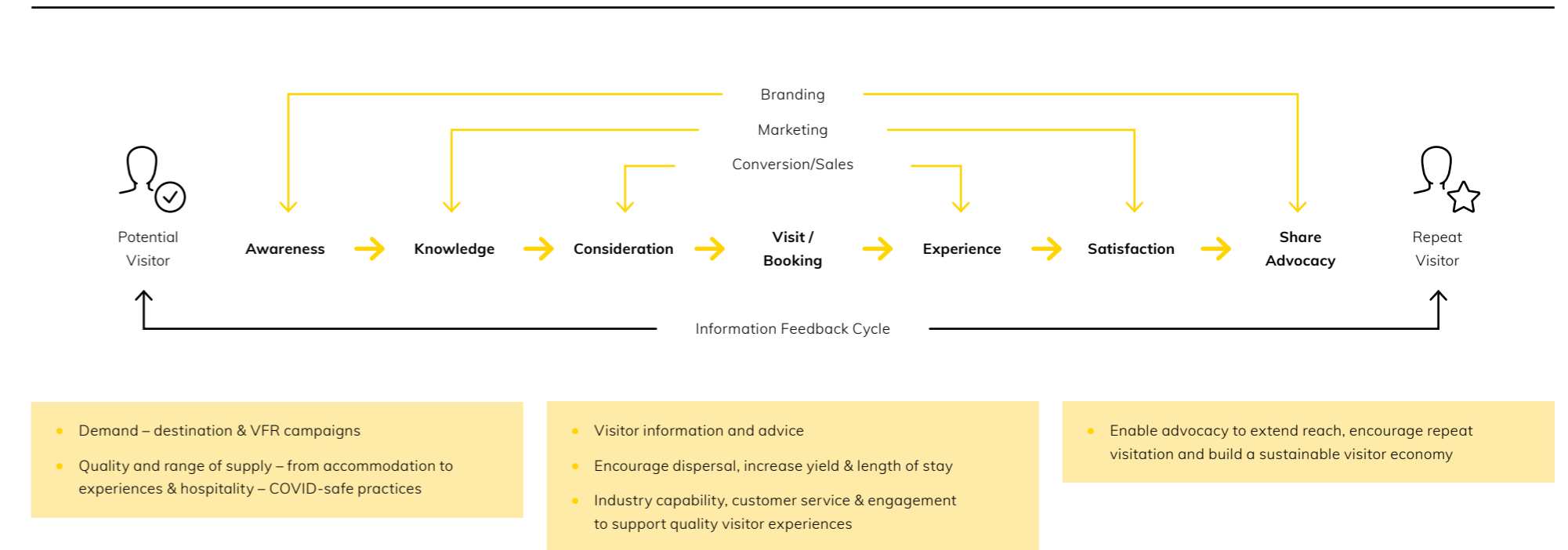
A final consideration is that the Northern Beaches Council has prepared a **COVID-19 Summer Action Plan for Outdoor Public Spaces**. This plan will inform a whole-of-Council approach to implementation of COVID-safe experiences and practices in the lead up to and during the summer 2020/21 season. Likewise, 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 based on the advice of 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), aim to find a balance between preparing for and managing the recovery phase while identifying those actions that deliver sustainable outcomes for the visitor economy.

## Recommendations for recovery 2020 to 2022

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

Figure 1



## Recovery plan

**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-visitors to overnight visitors and encourage greater regional dispersal
- Increase yield, length of stay and repeat visitation
- Address seasonality - 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 resulting market trends, desires or expectations

**Principles:**

- Adopt a customer-centric approach
- 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 advocacy for the Northern Beaches
- Recognise that collaboration is a key to success

## Recovery plan

**Shifting demand**

- One voice - reinforce unifying Northern Beaches identity while maintaining personality of places & precincts
- Create and distribute remarkable content – safe, simple & compelling – enable access for businesses to access & share
- Implement a Visiting Friends & Relatives (VFR) program – local loyalty + reconnect
- Implement a destination campaign focused on higher-yield markets
- Implement a mobile Visitor Information Service for peak periods
- Re-imagine Manly VIC and services – create a single multi-channel contact centre
- Develop a business partnerships model
- Reform digital distribution of content & implement always-on digital advertising
- Implement digital and technology reforms for contemporary markets

**Strengthen supply**

- Develop and promote COVID-safe experiences and itineraries
- Reform the regulatory and approvals process and ease social restrictions to encourage greater outdoor dining and experiences to enable vibrant communities and spaces
- Opportunities for customer-centric demand management initiatives
- Small scale and boutique events, workshops and masterclasses linked to itineraries to increase length of stay
- Revitalise key precincts in a staged approach, trialling initiatives in line with COVID-safe practices & reinforce vibrant sense of place e.g. outdoor dining
- Encourage investment in accommodation (including Council-owned or managed assets)
- Opportunities for bike share and e-bikes

**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 responsive industry capability development program with opportunities for mentoring

## Prioritised action plan 12 - 18 months

Recommendation	Notes for implementation or activation
<b>Shifting Demand – Marketing</b>	
1.1 Identify one voice: Build awareness of single unifying brand identity for Northern Beaches across all channels as a destination of choice.	<ul style="list-style-type: none"> <li>Years 1 and 2 implement a micro-site web page as a focus for visitor servicing and activation, as an interim stage in reforming the digital and online presence of the Northern Beaches.</li> </ul>
1.2 Establish a single destination website and dedicated social media channels that are visitor-centric and offer an easy way for visitors or potential visitors to find out more about the destination.	<ul style="list-style-type: none"> <li>Integrate simple technology innovations, such as Augmented Reality (AR) and QR codes into content to link offline collateral to digital content</li> </ul>
1.3 Implement a campaign for the local community and VFR market leading to a microsite. Launch Feb/March 2021.	<ul style="list-style-type: none"> <li>Maintain the Hello Manly website for visitor information services. However, ensure links to the region-wide destination marketing platforms. This should consider the early stages of transitioning the Hello Manly Facebook and Instagram pages into the VisitNorthernBeaches sites.</li> </ul>
1.4 Implement a campaign targeting high-yield markets to drive mid-week, low and shoulder seasons. Launch mid 2021 (winter campaign).	<ul style="list-style-type: none"> <li>Develop a remarkable content calendar and create compelling content to bring to life the personalities of the villages, places and precinct. Focus on regional dispersal and raise awareness of COVID-safe things to see through to the solutions to key challenges for visitors during peak periods.</li> </ul>
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 Northern Beaches' COVID-19 Summer Action Plan for Outdoor Public Spaces.	<ul style="list-style-type: none"> <li>Encourage local businesses to share new content through their channels and to follow and like VisitNorthernBeaches social media channels, consider leveraging user generated content</li> <li>Ensure collateral includes easy to read and easy to use itineraries that profile a range of things to do within specified timeframes e.g. half day, full day, two days. Integrate content from private sector providers where appropriate to the experience being curated.</li> </ul>

Recommendation	Notes for implementation or activation
<b>Shifting Demand – Visitor Services</b>	
2.1 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 including social media (Instagram, Facebook, Messenger etc).	<ul style="list-style-type: none"> <li>Implement mobile Visitor Information Services to reach visitors where they are during peak seasons and events (as and when they return). Deliver this as a concierge service and consider the viability of attracting volunteers to deliver this service.</li> <li>Create and increase distribution of simple and compelling content to encourage regional dispersal and raise awareness of COVID-safe things to see through to the solutions to key challenges for visitors during peak periods (e.g. parking during summer holidays along the beaches).</li> <li>Reform collateral 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).</li> <li>Engage local businesses (cafes, pubs, clubs and real estate agents) to distribute appropriate, contemporary and simple collateral. In some cases, it may be as simple as asking cafes or clubs to use drink coasters that incorporate a QR code to activate the Northern Beaches' destination website.</li> </ul>

Recommendation	Notes for implementation or activation
<b>Strengthen Supply</b>	
3.1 Develop and profile COVID-safe experiences and itineraries. Outdoor recreation, accommodation and dining, nature-based and wellness experiences should be the highest-order priority. This will deliver on the COVID-19 consumer behaviour trends while also leveraging investment in key assets such as the Coast Walk. Pilot experiences to be trialled over summer could include nature-based glamping.	Implementation should be informed by Council's COVID-19 Summer Action Plan for Outdoor Public Places while also adapting to any easing of COVID-19 restrictions based on the advice of the NSW Government's Chief Medical Officer.
3.2 Council to reform the regulatory and approval processes to actively 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 allow a more vibrant use of spaces and places in an appropriate and COVID-safe manner.	As above. In addition, consider the fast track of trial initiatives such as outdoor dining precincts utilising places such as The Corso, temporary road closures and other open spaces.
3.3 In line with the Northern Beaches' <b>COVID-19 Summer Action Plan for Outdoor Public Spaces</b> , implement customer-centric demand management initiatives. Consider ways to support local businesses, especially hospitality and accommodation providers, through high-demand parking or transport solutions.	As above. In addition, implement trials for actions such as the reintroduction of park and ride services between 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 aims to promote the health of local economies and increase greener public spaces.	Trial Streets as Shared Spaces program to test community support and industry benefits.
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, place making and return on investment modelling should be commenced as a priority.

Recommendation	Notes for implementation or activation
<b>Industry Capability &amp; Preparedness</b>	
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 helpful links for those businesses who seek training programs or grant funding etc.	Implement a regular tourism industry e-newsletter.
4.2 Strengthen industry networks to enhance collaboration.	Conduct 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 and follow up survey to gauge industry sentiment and need for ongoing support.
4.4 Pilot a tourism industry capacity building program (Tourism e-School) and develop a more comprehensive, tailored and responsive capability development program for local operators.	Tourism e-School have developed a Marketing Mentoring Program for the Northern Beaches which will support Tourism Operators through educating, inspiring and empowering them to take positive action to develop and market experiences to drive demand and desirability as a tourism destination.