



# MINUTES

## **ECONOMIC & SMART COMMUNITIES STRATEGIC REFERENCE GROUP**

held in the Council Chambers, Manly on

**THURSDAY 7 MARCH 2019**

## **Minutes of the Economic & Smart Communities**

### **Strategic Reference Group**

**held on Thursday 7 March 2019**

**in the Council Chambers, Manly**

**Commencing at 6:04pm**

### **ATTENDANCE:**

#### **Committee Members**

Mayor Michael Regan  
(Chair)

Cr David Walton

Cr Sue Heins

Cr Stuart Sprott

Andy West

Stuart White

Drew Johnson

Peter Middleton

Geri Moorman

Alan McNamara

Alexander Coxon

Microsoft Australia

Manly Business Chamber

Newport Residents Association

#### **Visitors**

Carl Solomon

Director Destination Marketing Store

#### **Council Officer Contacts**

Kath McKenzie

Executive Manager, Community Engagement &  
Communications

Nathan Rogers

Chief Information Officer

Deb Kempe

Team Leader, Economic Development & Tourism

Claire Chaikin Bryan

Project Manager

Tamara Lukic

Governance Officer

## 1.0 APOLOGIES

Apologies were received from Ngaire Young, Saul Carroll and Gordon Lang.

## 2.0 DECLARATION OF PECUNIARY AND CONFLICTS OF INTEREST

There were no declarations of pecuniary or non-pecuniary conflicts of interest.

## 3.0 CONFIRMATION OF MINUTES OF PREVIOUS MEETINGS

### 3.1 MINUTES OF ECONOMIC & SMART COMMUNITIES STRATEGIC REFERENCE GROUP MEETING HELD 27 FEBRUARY 2019

#### ACTION

The Minutes of the Economic & Smart Communities Strategic Reference Group meeting held on 12 December 2018, are hereby confirmed as a true and correct record of the proceedings of that meeting, subject to the following amendment of the Item 4.4 '*Outdoor Dining Policy and Implementation*' including the following:

- A. The group highlighted the distinction between a valuation policy and a pricing policy. The floor had no objections to the valuation policy. The group wanted a further consideration of the pricing policy with regard to:
  - a) the current council fees for outdoor dining fees reflecting less than 100% of the valuation
  - b) whether the increase of fees should be effective as soon as possible if at all, and
  - c) consideration of the impact of the fees on tourism, employment, small business viability and local economic activity.
- B. The discussion by the group around the notion that a reduction in revenue from outdoor fees and charges is a form of 'subsidy' to business owners, produced debate. The group pointed out, that it is not a subsidy but rather a reduction in potential revenue – it is no more a subsidy than the installation of public Wi-Fi in Manly. Subsequently, there was a request to remove the word "subsidy" from the Minutes Item 4.4.

## **4.0 AGENDA ITEMS**

### **4.1 NORTHERN BEACHES VISITOR SURVEY 2019**

#### **DISCUSSION**

D Kempe presented on this item. A copy of the presentation is at Attachment 1.

During January 2019, Northern Beaches Council engaged the services of external market research company to undertake an intercept survey of visitors to the Northern Beaches. The survey was conducted at the visitor hotspots of Manly and Palm Beach during peak visitor season and builds upon the 2018 Northern Beaches Visitor Survey. A total of 613 visitors were surveyed, including the locals (non-visitors) to rate the overall impact tourism has on the Northern Beaches.

D Kempe shared the following with the group:

- Data collected was consistent with the last year's data
- Drop in spending by visitors compared to last year
- Palm Beach was rated high in atmosphere however, lower in shopping
- A 'Word of Mouth' was identified as the key information sources.

Following the presentation, the group suggested conducting a survey in winter and exploring the idea of promoting the Northern Beaches as a winter destination. They also suggested that Council should look into corporate entertainment opportunities to attract more visitors.

#### **ACTION**

That D Kempe present the complete key findings from the survey at the next Economic & Smart SRG meeting on 29 May 2019.

## 4.2 NORTHERN BEACHES DESTINATION MANAGEMENT PLAN WORKSHOP

### DISCUSSION

C Solomon, Director Destination Marketing Store presented on working with Council on developing a Destination Management Plan. A copy of the presentation is at Attachment 2.

C Solomon shared the following information:

- The 4 key themes emerging from the Global and Domestic Travel Trends.:
- 'Rich' insights from consultations and workshops with the community:
- Key strengths and opportunities identified related to:
  - Surfing culture and outdoor sporting pursuits
  - Art and creative – music needs better presence
  - History and heritage of the region
  - Nature and the region's spectacular waterways.
- Food and the Experience are the current drivers of tourism and visitors' interest for the Western market.

The group agreed that 'insights' from community consultations provide an opportunity for Northern Beaches to expand on just being a weather and season dependant tourist destination. It is an opportunity to promote destinations, market a vibrant and unified Northern Beaches with numerous authentic and iconic individual places attractive to visit.

Following on from the discussion, the group was also asked the question "What is Council's role in all of this" and the following suggestions were shared:

- A need for 'Icon', such as the Palm Beach to Manly walk
- Council should facilitate people and businesses to take initiative
- Council should provide assets and support to businesses to attract more visitors
- Council should manage marketing aspects of the region
- Council should establish a relationship with Tourism Australia and other organisations to enable a delivery of unique and iconic events.

The group also agreed that facilitating local businesses and people to take initiative to provide the 'Experience' for visitors will:

- Attract more visitors
- Enable business to package on those opportunities
- Create sustainable jobs rather than just seasonal jobs.

### ACTION

That members of the Economic Development & Smart Communities SRG send their feedback to K McKenzie to be later on shared with the group.

#### **4.3 MANLY JAZZ FESTIVAL 2018 WI-FI REPORT**

##### **DISCUSSION**

The group received the WI-FI report on Manly Jazz Festival and N Rogers advised that another WI-FI report, a collection of data gathered from on the Vissla Sydney Surfing Pro-Official Event will be shared with the group soon.

#### **4.4 SMART BEACHES PROJECT UPDATE**

##### **DISCUSSION**

C Chaikin Bryan provided an update on the Smart Beaches Project (the Project). A copy of the presentation is at Attachment 3.

She informed the group of the Project's official launch and the official definition of 'Smart Beach'. She outlined that the Project will deliver safer and cleaner beaches, better beach facilities and improved provision of beach services and ultimately enhance community' digital literacy

The group was showed a clip/excerpt of drones being used to track the shark movement; and advised that the same method can be used for the safety on the beache.

In conclusion C Chaikin Bryan informed the group of LoRaWAN gateway in Manly and sought ideas on how to best promote it. The group suggested approaching schools, teaches and possibility through competitions.

A suggestion from the group to use drones to track penguins also provided for the idea to use penguins as the 'Icon' of the beaches, something authentic, unique of the NB.

More information on the Things Network is at : <https://www.thethingsnetwork.org/>.

##### **ACTION**

That C Chaikin Bryan provide the group with regular quick updates on the Smart Beaches Project.

## 5.0 GENERAL BUSINESS

Following on from previous discussions on the *Outdoor Dining Policy and Implementation vs Property Management Policy*, K McKenzie clarified that the first policy is a valuation policy and the second is a pricing policy.

She then advised the group that the workshop on the *Property Management Policy* will be held in a near future, and that the group will have the opportunity to provide input into submission before it goes to Council Meeting in July 2019.

### ACTIONS

That K McKenzie:

- Inform the group on the workshop timing
- Inform the group of the 2020 budget exhibition proposed timeframe
- Inform the group when the Property Management policy goes to exhibition
- Send around a copy of the Property Management policy.

## SUMMARY OF ACTIONS

| ITEM NO. | ACTION   | RESPONSIBLE OFFICER | DUE DATE    |
|----------|--|---------------------|-------------|
| 4.1      | Present the complete key findings from the survey at the next Economic & Smart SRG meeting on 29 May 2019. | D Kempe             | 29 May 2019 |
| 4.2      | Send feedback to K McKenzie to be later on shared with others.   | SRG                 | May 2019    |
| 4.4      | Provide the group with regular quick updates on the Smart Beaches Project.                                 | C Chaikin Bryan     | Ongoing     |
| 5.0      | Inform the group on the Property Management Policy workshop time.  | K McKenzie          | May 2019    |
| 5.0      | Inform of the proposed time for the 2020 budget exhibition.  | K McKenzie          | May 2019    |
| 5.0      | Inform the group of when the Property Management Policy goes on exhibition.                                | K McKenzie          | May 2019    |
| 5.0      | Send out a copy of the Property Management Policy to the Group.  | K McKenzie          | May 2019    |

*The meeting concluded at 8:05 pm.*

This is the final page of the Minutes comprising 24 pages numbered 1 to 24 of the Economic & Smart Communities Strategic Reference Group meeting held on Thursday 7 March 2019 and confirmed on Wednesday 29 May 2019.

# 2019 Visitor Survey

## Manly & Palm Beach





# Who they were

## Origins

- Overseas Manly 47% Palm Beach 34%

## Accommodation

- Staying with 'Friends & Relatives' most popular (40%)

## Young demographic

- Manly 60% Palm Beach 73% under 40yrs
- Most coming with friends

## Mode of travel

- Manly - 71% Ferry; 21% Car; 17% Bus
- Palm Beach - 8% Ferry; 50% Car; 45% Bus



# What they did

- Key information sources
  - Word of mouth or returning visits
  - Majority for Manly pre-planned, for Palm Beach not pre-planned
- Main attractors
  - Beach, then visiting friends and relatives
  - Other activities - eating, walking/cycling and sightseeing
- Length of stay
  - Vast majority day trippers
  - 2-4 hours almost half
- Average spend
  - Manly x2 Palm Beach (\$60 vs \$30pp)



# What they thought

## Net Promoter Score (NPS)

- Palm Beach "Good" (43) ↓
- Manly "High" (65) ↑

## Satisfaction

- Manly extremely high 'atmosphere' and 'food and beverage'
- Palm Beach extremely high 'atmosphere' and 'cleanliness', but lower with shopping

## Stay longer?

- Manly – more attractions, food options, transport/parking
- Palm Beach – transport/parking, more food options, diverse shops



## Feedback and Questions

## Attachment 2

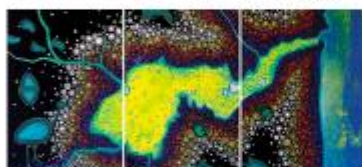


### Northern Beaches Council Destination Management Plan

#### PRESENTATION TO ECONOMIC DEVELOPMENT & SMART COMMUNITIES STRATEGIC REFERENCE GROUP

7 March 2019

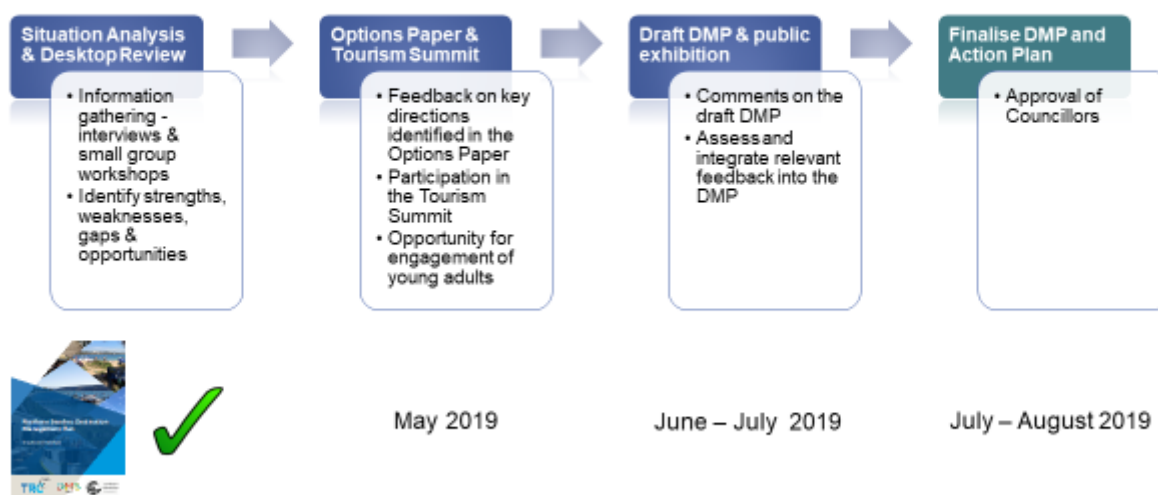




## TODAY'S PRESENTATION

1. Introduction to destination management planning and relevance to the Northern Beaches' visitor economy
2. Relevant global and domestic tourism and travel trends
3. Visitation to the Northern Beaches
4. Consultation insights gained through engagement with industry and Government stakeholders
5. Facilitated discussion on the SRG committee's insights into the Northern Beaches visitor economy and key issues, challenges and opportunities for the future

## STAGES IN THE DEVELOPMENT OF THE DMP



## MEANINGFUL DESTINATION PLANNING



- Adopt a **visitor-centric approach** to both supply and demand
- Evidence-based - informed by **consumer and visitor research** and **stakeholder consultation**
- Apply local meaning to **global and domestic trends** (Think Global, Act Local)
- Strengthening **partnerships** with stakeholders and businesses **across sectors**
- Identifying the region's **destination positioning, experience framework** and **hero & supporting experiences**
- Identify opportunities to strengthen **capacity and capability**
- Deliver a practical, realistic and implementable **action plan**

## MEANINGFUL DESTINATION PLANNING

- Determines a **balance between 'quick wins' and longer-term or major projects** to demonstrate success along the way and helping to strengthen support from industry and the community
- Considers **signature or hero experiences**, which will become the lead products for NBC as well as **supporting experiences** and services required to ensure visitor satisfaction
- Identifies key **enablers** to ensure projects and programs are relevant and implementable
- Leverage and align with the **NSW Government's Visitor Economy Industry Action Plan 2030**, Destination NSW's State-wide Destination Management Plan (Feb 2019) as well as **NBC's strategies and plans**
- **Tourism Summit and Options Paper** will enable greater engagement with stakeholders and the community to strengthen support and inspire ownership over the final DMP





## COLLABORATION & PARTNERSHIPS



- Framework for **sustainable growth of the visitor economy**, leveraging the attributes, businesses and activities quintessential to the Northern Beaches
- Strong focus on **vibrant communities**, recognising the benefits of tourism as part of regional economic growth
- Identify potential **new opportunities** that can assist in growth and yield, have the potential to attract investment and/or revitalise existing assets
- It will build a future for successful growth, investment and strong partnerships

## GLOBAL & DOMESTIC TRAVEL TRENDS

The key sources of this information include:

- Global research and publishing agencies: Skift and Euromonitor International
- Kantar TNS Domestic 2018.



There are **four key themes** emerging from global and domestic trends:

- Growth market opportunities
- Experiences over destinations
- Service, sustainability and social responsibility
- Future of digital



## GLOBAL & DOMESTIC TRAVEL TRENDS

### Growth market opportunities

- More active families
- Active 55+
- Contemporary women travellers
- Millennials
- Special-interest travel for events, nature & adventure, food & wine, art & culture, sport & recreation
- Visiting Friends & Relatives



## GLOBAL & DOMESTIC TRAVEL TRENDS

### Experiences over destinations

- Experiential travel – creating new opportunities for commercial tour operators. The focus is on small-scale, immersive and locally-curated activities.
- Transformative travel – shared moments with ‘besties’ through to self-discovery and confidence gained from trying new things - allowing visitors to find their own moments of serendipity and surprise
- Health & well-being a significant growth sector
- New luxury is defined by small brands with big stories - opportunity for genuine engagement and interaction with local people, nature, heritage and arts and culture. The story of the place, its people and their ‘craft’ is increasingly critical to the success of the experience, from artists and artisans to local sporting heroes
- Experiences are also about great events, from festivals to local markets. Events contribute to vibrant communities, a significant drawcard for attracting visitors as well as business travellers



## GLOBAL & DOMESTIC TRAVEL TRENDS

### Service, sustainability and social responsibility

- Environmental sustainability is increasingly important as a point of difference
- Differentiate on the quality of service, not technology tools
- The future of travel is humane and compassionate - the market is curating their own experience and sharing it with their friends and peer groups.



### Future of digital

- All demographics are now connected
- Personalisation of content
- Ease of the 'user experience' is crucial - in-trip discovery & online booking



## VISITATION TO THE NORTHERN BEACHES

The following graphs provide trend analysis over ten years, from 2009 to 2018.

It is drawn from Tourism Research Australia (TRA) data, including the International Visitor Survey (IVS) and National Visitor Survey (NVS).



|  | 2009  | 2010  | 2011  | 2012  | 2013  | 2014  | 2015  | 2016  | 2017  | 2018  |
|--|-------|-------|-------|-------|-------|-------|-------|-------|-------|-------|
| Total including international Manly Day Visitors | 2,209 | 2,643 | 2,598 | 2,399 | 2,928 | 2,927 | 2,490 | 3,372 | 3,073 | 2,998 |
| Year on year (YOY) % Change*                     | -     | 20%   | -2%   | -8%   | 22%   | 0%    | -15%  | 35%   | -9%   | -2%   |
| Total excluding Manly International day          | 1,684 | 1,851 | 1,839 | 1,668 | 2,162 | 2,107 | 1,833 | 2,414 | 2,310 | 2,073 |
| Year on year (YOY) % Change*                     | -     | 10%   | -1%   | -9%   | 23%   | -3%   | -13%  | 32%   | -4%   | -10%  |

\* No statistical significance of this change is not confirmed and should be seen as indicative.

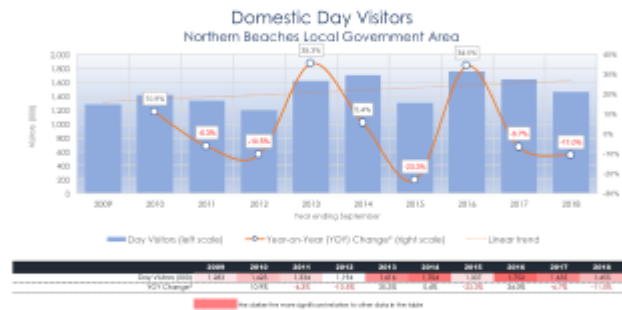
The darker the more significant relative to other data in the table

#### NOTES

International visitors to Manly do not distinguish between overnight or day visitors. Northern Beaches LGA International Overnight visitors have been deducted from the Manly visit total to estimate International Manly Day Visitors. This assumes all LGA visitors visit Manly at some stage during their stay.



## VISITATION TO THE NORTHERN BEACHES



## VISITATION TO THE NORTHERN BEACHES



## VISITATION TO THE NORTHERN BEACHES

| Main Reason for Trip<br>5 year total:<br>2013/14 – 2017/18 | Domestic Overnight |                  |             | International  |                   |             |
|--|--------------------|------------------|-------------|----------------|-------------------|-------------|
|  | Visitors           | Visitor Nights   | % Visitors  | Visitors       | Visitor Nights    | % Visitors  |
| Visiting friends and relatives                             | 1,317,444          | 4,139,579        | 54.3%       | 174,905        | 2,753,160         | 35.8%       |
| Holiday  | 636,445            | 1,856,091        | 26.2%       | 175,560        | 3,678,900         | 36.0%       |
| Business   | 344,200            | 978,417          | 14.2%       | 27,222         | 298,350           | 5.6%        |
| Education  |                    |                  |             | 27,969         | 2,466,336         | 5.7%        |
| Employment   |                    |                  |             | 13,666         | 1,280,909         | 2.8%        |
| Other reason   | 132,695            | 566,839          | 5.5%        | 68,652         | 1,542,227         | 14.1%       |
| <b>TOTAL</b>   | <b>2,426,159</b>   | <b>7,540,927</b> | <b>100%</b> | <b>487,977</b> | <b>12,019,884</b> | <b>100%</b> |

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

## CONSULTATION INSIGHTS

To date, we have consulted with a wide variety of businesses, tourism operators and representatives from the Northern Beaches Council as well as organisations such as Chambers of Commerce, State and Commonwealth Government agencies, including Destination NSW, NSW National Parks and Wildlife Service and Sydney Harbour Federation Trust, among others.

The meetings and workshops provided rich insights into:

- Broader community views on the current visitor economy in the Northern Beaches area
- Strengths, weaknesses and opportunities for the visitor economy
- Challenges or gaps to address

## CONSULTATION INSIGHTS



- Communities of the Northern Beaches strongly value the environmental qualities and aesthetics of the region, which influences their views on supporting tourism as part of economic growth.
- Access to the northern precinct of the Northern Beaches is a clear limitation, specific issues include lack or high-cost parking for visitors, competition for parking with local communities (especially those residents located on the western foreshores of Pittwater) and public transport.
- B-Line (and associated services such as Keoride) was identified as a popular service that has enhanced access to the area.
- Limited accommodation options, especially more traditional style accommodation such as hotels. Importance of maintaining accommodation to suit a range of budgets and tastes, including for the youth market and facilities such as Currawong Beach Cottages and the NRMA Sydney Lakeside Holiday Park
- Facilities and accommodation that support disabled access was also highlighted as an opportunity, although requires broader business support.

## CONSULTATION INSIGHTS



- Visitation is strongly influenced by seasonality and is weather-dependent. The peak period of travel includes summer and school holidays, with many sites at capacity during this period. A key impact is on year-round viability of many businesses
- Experience offering is limited. Key areas identified included Aboriginal tourism products and nature-based products. A range of issues were identified including:
  - Challenges facing commercial operators accessing national parks as well as constraints on developing and delivering high-quality, customer-centric experiences
  - Access to key points of interest as well as water-based access, such as overcrowding at wharves
  - Low-level awareness of the needs relating to export-ready products
  - NPWS not well funded to develop products offering world-class experiences
- Constraints on open space and recreational areas, in part due to high demand from within the local community for sporting and recreation facilities. Opportunity for adaptive reuse of existing assets

## CONSULTATION INSIGHTS



- Key strengths and opportunities identified related to:
  - Surfing culture and outdoor sporting pursuits, from swimming to sailing and cycling - area is home to industry innovation + events assist in highlighting and promoting the active, healthy outdoor lifestyle of the Northern Beaches;
  - Art and creative industries - a very strong community of artists, popular local trails and events, including for film and photography. Opportunity for the Northern Beaches Coast Walk
  - History and heritage of the region was also a key theme
  - Nature and the region's spectacular waterways are seen as a very strong opportunity
- Generally poor perception of the way in which the Northern Beaches is promoted, especially year-round and to encourage greater dispersal to less well-known parts of the LGA
- Events perceived as a positive opportunity, despite constraints such as noise and lack of facilities to cater to large groups of people. Local, small-scale events were seen as an important contribution to the vibrancy of local communities

## DISCUSSION & INSIGHTS



northern  
beaches  
council

- Vision for the Northern Beaches' visitor economy
- Current situation, including strengths and weaknesses
- Opportunities, gaps and/or challenges to address within the DMP
- General discussion & questions

Attachment 3



# Smart Beaches Project Update

SRG 7 March 2019



## Project Launch



## What is a Smart Beach?

A Smart Beach uses **technology** and **data** to achieve improved beach **safety** and **amenity**



## Project Outcomes



## Project Partners – Co-design



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**UTS**

UNIVERSITY  
OF TECHNOLOGY  
SYDNEY



Australian Government

**BUILDING OUR FUTURE**



NATIONAL  
NARROWBAND  
NETWORK  
Co.



SURF LIFE SAVING  
NEW SOUTH WALES

**NOKIA**



**SUMS+**



Data  
Analytics  
Centre





## LoRaWAN Gateway Manly

