

Northern Beaches Council 2019 Visitor Survey

Prepared for:



northern
beaches
council

Background and project design



Background

The Northern Beaches Council were keen to understand what drives visitation to the key tourist locations of Manly and Palm Beach. In particular, they were seeking to gather information on the profile of these visitors, for example:

- Their origins
- Length of stay
- Expenditure and nature of spend
- Satisfaction with the experience
- Improvements or gaps in the offer

The findings of this project are planned to feed into a Destination Management Plan for the Northern Beaches and to provide an indication of changes that may have occurred since the baseline read (in 2018) undertaken for these locations.

Project Design

This Follow-up measure was quantitative in nature, and involved a series of n=613 face-to-face intercept interviews:

- n=439 visitors in Manly (including n=190 at Manly Wharf/West Esplanade)
- n=174 visitors in Palm Beach

A short questionnaire (5 to 8 minutes) was devised to be employed amongst visitors in each location.

A range of weekday and weekend days were included, and a variety of times (from morning through to evening) were covered from each location.

Fieldwork was carried out between 4 January and 21 January 2019.

Palm Beach survey zones

Zone 1

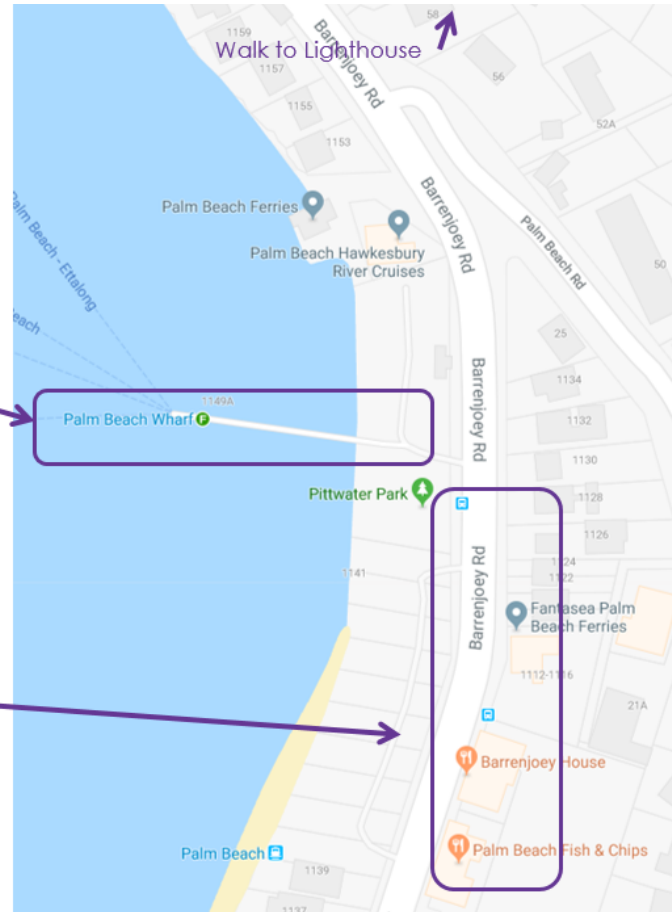
Survey Spot #1

The Wharf is a key location for visitors. Day trippers come to Palm Beach from the Central Coast and Visitors daytrip & stay overnight at accommodation, camping & airbnb at offshore locations.

We have permission from fantasiaa cruising to interview visitors as they wait for the ferry. Please see ferry timetable for indication of when key visitor movements will take place

Survey Spot #2

Between ferry movements it would be worthwhile approaching people at the bus stop and outside the businesses. Alternatively Pittwater park and children's playground along the shoreline could be a good location.



Zone 2



Survey Spot #3

The Boathouse is a popular venue that attracts locals & visitors. It's a popular spot for locals to take friends & family who are visiting the area. Alf's bait shop is next to the Boathouse (Home & Away) and the carpark to the North of the boathouse will catch visitors who have come by car to do the lighthouse walk.

Survey Spot #4

If its good weather with lots of beachgoers, the Surf Club could be worth a try, however it was pretty quiet with the kiosk closed when we scoped it out at 1pm on Thurs 11/1/18. If you see tour busses arriving it would be worth catching them here.

Survey Spot #2

Governor Phillip Park – a good spot, particularly on Market days (28/29th Jan). Otherwise it's a popular shady picnic spot with children's playground.

Survey Spot #1

The Bus stop on Beach Rd is the busiest area for visitors arriving by bus and those walking around from the wharf on their way to the Home & Away sites/ Barrenjoey lighthouse



Manly survey zones



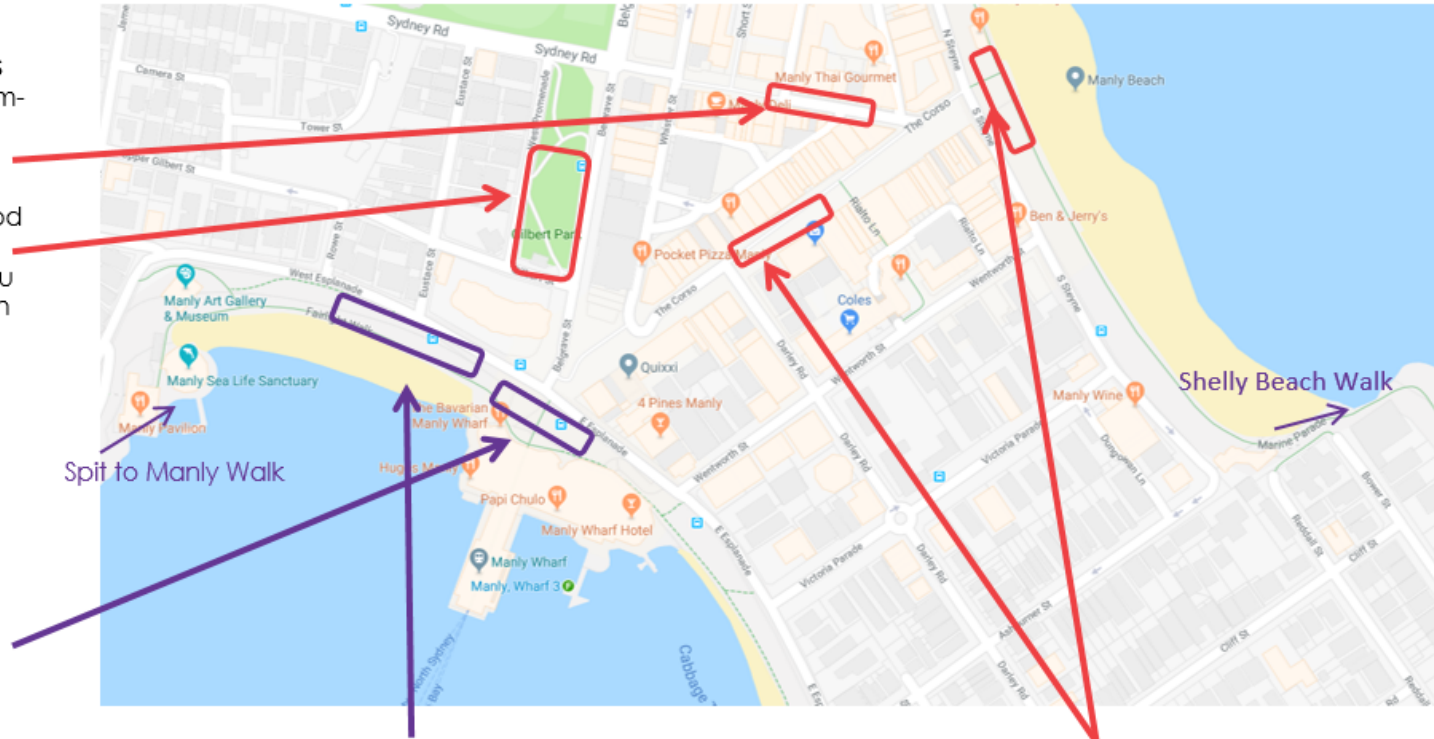
Survey Spot #4 – Market Locations
Manly Markets – Saturdays & Sundays 9am-5pm this area attracts a lot of visitors. Its also a popular dining precinct in the evenings.

Gilbert Park - Friday evenings 5-9pm a food market is held here, we are unsure of the proportion of visitors/locals so see how you go. Outside this time there won't be much activity at this location.

Survey Spot #1 – Wharf

The Wharf captures people arriving by ferry and public transport before they disperse. On busy days large waves of people may make it difficult to get people to stop and chat. Peak times are 9-11am and 3-5pm.

The area near the visitor information centre could be a good location. Please stay out the front in the forecourt area as the wharf itself is a private building.

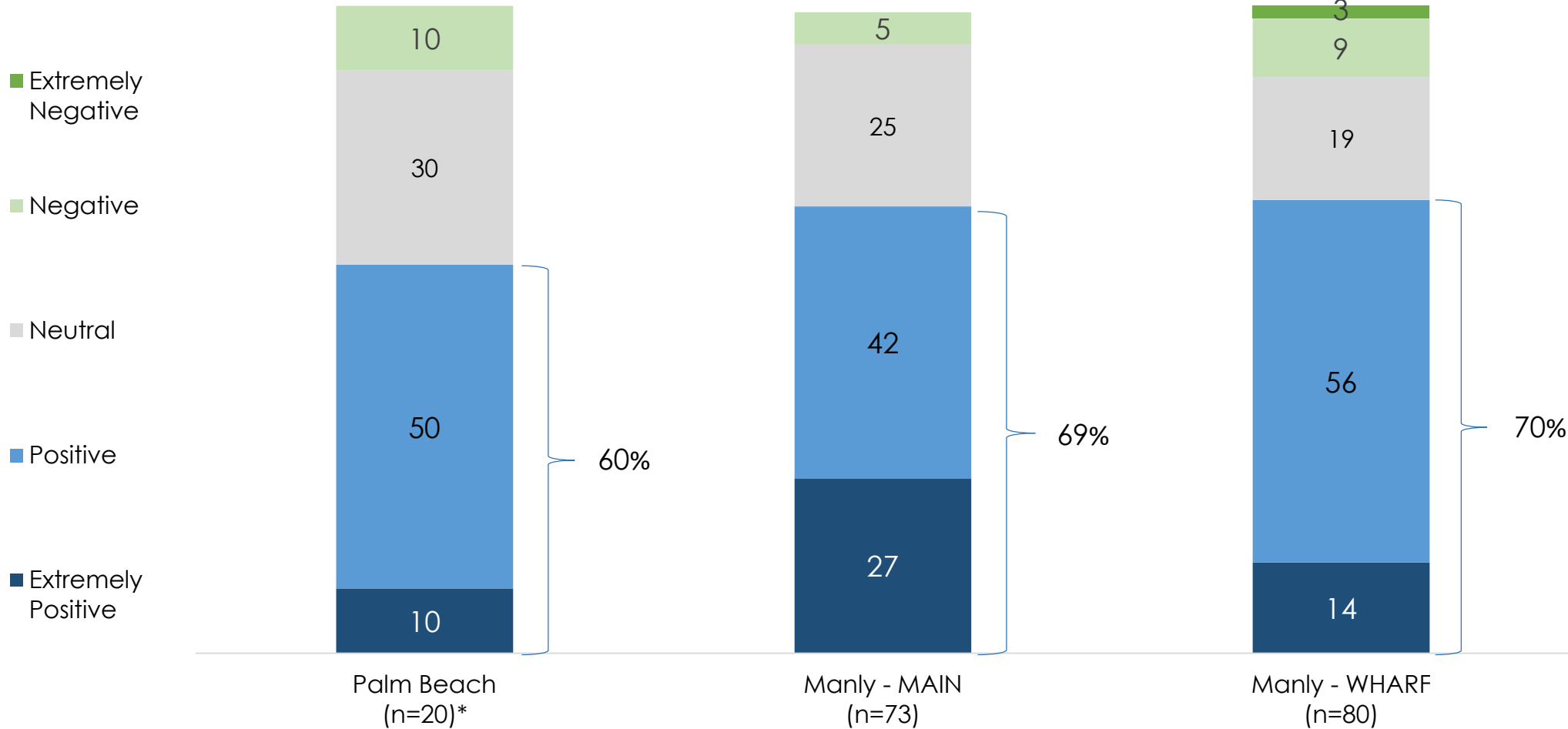


Survey Spot #2 – The Office & Spit to Manly West Esplanade - This grassy picnic area attracts different demographics, particularly younger daytrippers and backpackers since the alcohol free zone restrictions have been relaxed. This location is buzzing in the late afternoon 3-8pm as people picnic, watch the sunset and pre-drink before hitting up Manly's nightlife and people finishing the spit to manly / Fairlight walk.

Survey Spot #3 – Mid-Corso & Beachfront Foot traffic from the wharf tends to slow down mid-corso as people disperse from the Ferry. People tend to stop to admire the view at the beachfront while they decide where to go next. This would be a great spot to talk to people before they disperse further (ie walk around to shelly beach is popular). 10am-6pm will see a lot of day-trippers while evenings will be a great opportunity to capture overnight visitors & Manly's nightlife.



Perceived impact of tourism on the Northern Beaches



Local Northern Beaches residents were asked to reveal their opinion of the impact of tourism.

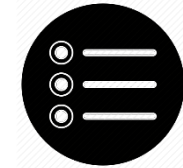
The majority of those who responded indicated that they felt that tourism had a positive impact (though they were more likely to indicate 'positive' than 'extremely positive').

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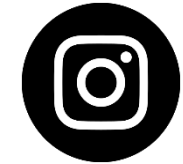
Who they are



What attracted them



What they experienced



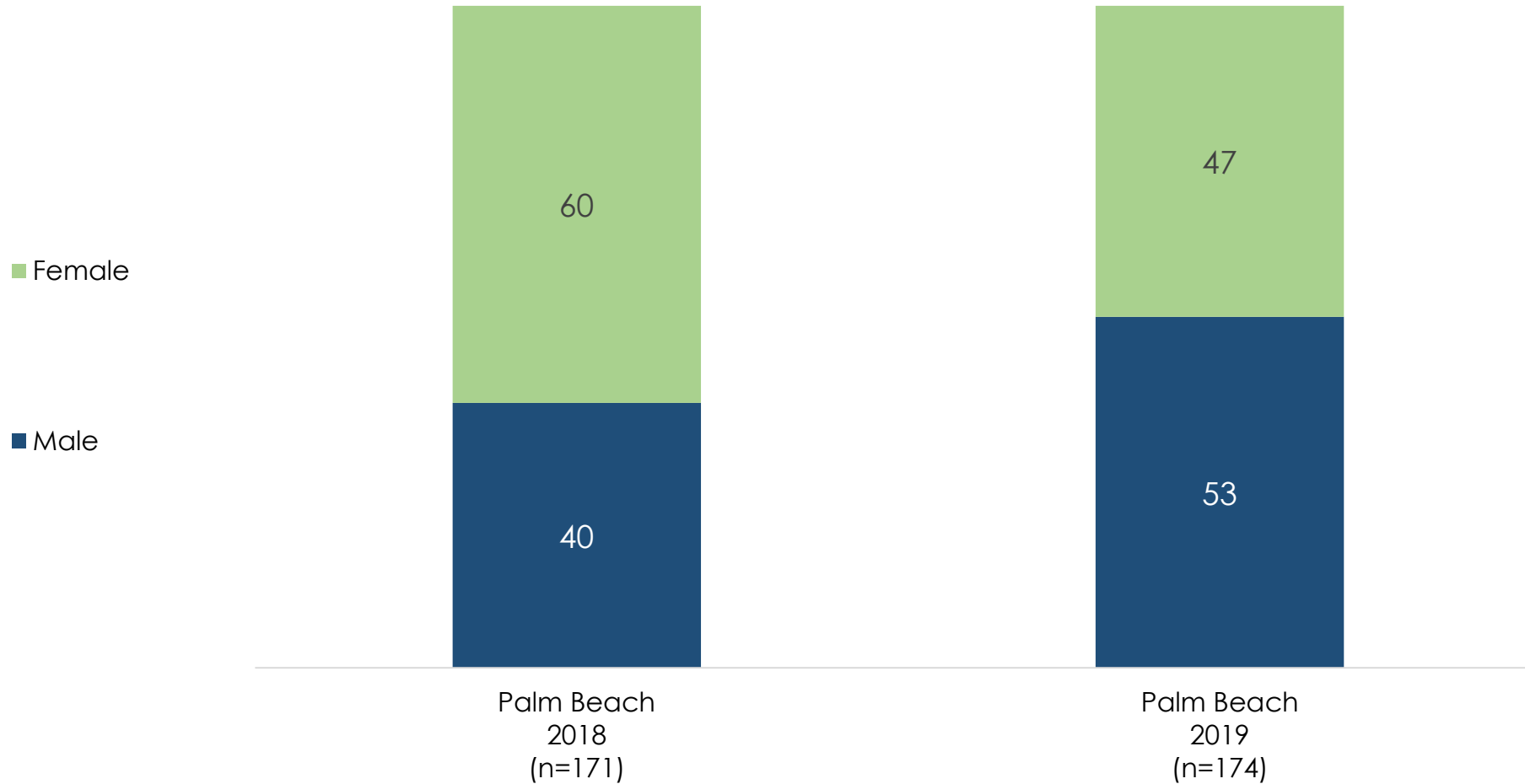
Satisfaction & NPS





Whereas 2018 had a skew towards the female population, in 2019 there was a slight male skew to the respondent base (53%).

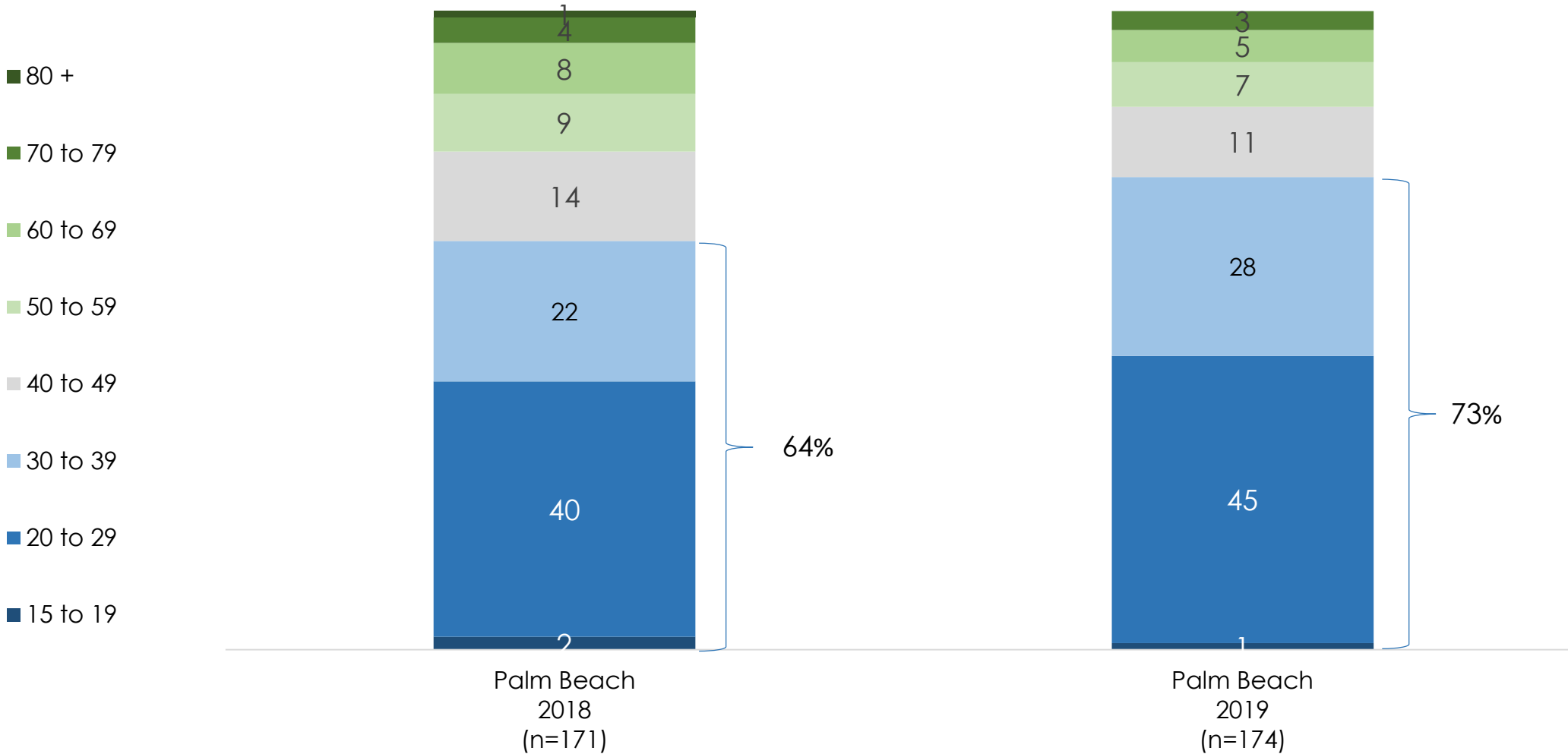
Gender of respondents





Age range of respondents

In 2019, there was a relatively young age profile - with 74% of respondents under 40 years old, and almost a third (28%) aged 20 to 29.





*Similarly to 2018,
many visitors
were in
attendance with
a partner,
however less
were with friends
than in the
previous year.*

Who they were visiting with

	Palm Beach 2018 (n=171) %	Palm Beach 2019 (n=174) %
Partner	49	51
Friends	45	27
Children	28	23
Self only	5	13
Family NFD	10	8
Parent(s)	4	2
Sibling(s)	1	-
Work colleagues	2	1
Grandchildren	1	-

Place of residence

	Palm Beach 2018 (n=171) %	Palm Beach 2019 (n=174) %
Sydney	68	58
Inner City	12	16
Lower Northern	11	11
Eastern Suburbs	7	2
Central West	8	3
Central Northern	8	7
St. George-Sutherland	3	1
Inner West	4	2
Canterbury-Bankstown	3	3
Northern Beaches	2	1
Blacktown	4	1
Outer West	2	2
Fairfield-Liverpool & Outer South West	4	3
Other NSW	8	3
Other Australia	6	5
Overseas	18	34
UK	8	6
USA	-	2
New Zealand	-	3
France	1	1
The Netherlands	2	-
Germany	2	4
Other	4	13



The 2019 respondent base contained a higher proportion of overseas visitors (34%, compared to 18% in 2018).



Mode of transport used

Age	Total (n=174) %	15-29 years (n=80) %	30-49 years (n=67) %	50+ years (n=27) %
Car	50	34	64	59
Bus	45	65	25	30
Ferry	8	3	9	19

Younger respondents (aged 15-29 years) were most likely to travel to Manly using the bus (65%), when compared to older respondents (30+ years).

A larger proportion of respondents from the older age bracket (aged 50+) rode on the ferry compared to younger respondents.

Q4. And how did you get here today? DO NOT PROMPT. MULTIPLE RESPONSE.

BASE: All Palm Beach respondents (n=174)



Most overnight visitors were staying in a campground or with friends/relatives.

While based on small numbers, this result differs from 2018, where most respondents were staying in a private letting.

Accommodation type used

	Palm Beach 2018 (n=12)* %	Palm Beach 2019 (n=22)* %
With friends/relatives (unpaid)	8	41
Campground	25	41
Private letting (e.g. Airbnb)	50	14
Motel/Backpacker	8	5
Hotel	8	-

Q7. What style of accommodation are you using? Is it..... READ OUT.

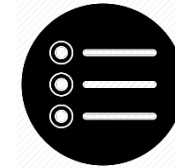
BASE: Palm Beach respondents indicating that they were staying overnight (2018: n=12; 2019: n=22)

* WARNING: Small base size

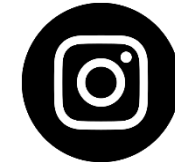
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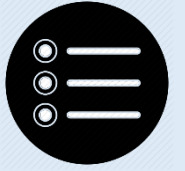


Satisfaction & NPS



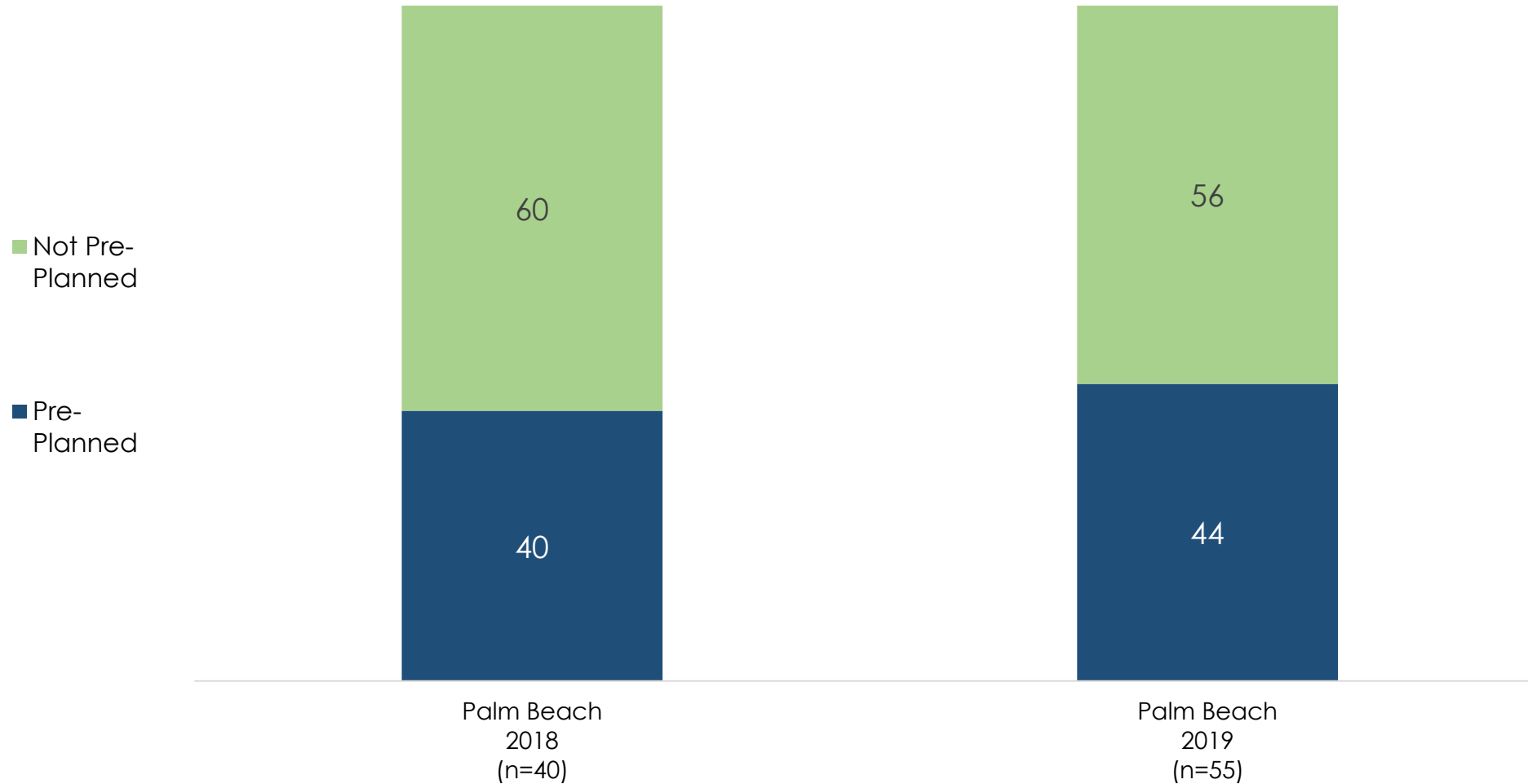
Information sources

	Palm Beach 2018 (n=171) %	Palm Beach 2019 (n=) %
Word of mouth (in person)	49	48
Previous visit/experience	33	26
From Home and Away	9	9
Through social media	2	9
We just Googled "Sydney beach"	2	7
We live/used to live in Sydney	1	2
A description in a travel guide	1	2
Part of a set tour	-	1
Everybody knows it/its iconic	4	1
Internet/website (SPECIFY)	6	-
We just came across it	1	-
Friends/family live here	1	-
Other (SPECIFY)	1	-
Don't know	-	-

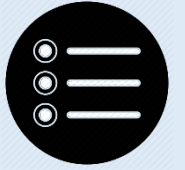


Similarly to 2018, word of mouth, and previous visiting experiences were the most common information sources.

Incidence of visit being pre-planned



The majority of those from Interstate or Overseas indicated that their visit to Palm Beach was not pre-planned. This result is similar to 2018.



The beach was the key drawcard in both years.

Other reasons for visiting Palm Beach in 2019 included visiting friends and family as well as riding the ferry.

Specific attractions resulting in visit

	Palm Beach 2018 (n=171) %	Palm Beach 2019 (n=174) %
The beach	64	92
Visiting friends and family	12	10
The ferry ride	2	6
The lighthouse	15	-
The markets	6	-
The food/cafes	3	-
The ambience/atmosphere	1	-
Seeing the Home and Away set	7	-
The views/it's a pretty area	5	-
General sightseeing	2	-
Its less crowded than other Sydney beaches	3	-
The headland	6	-
There are good walks/trails	1	-
Business purposes	1	1
Other	9	-

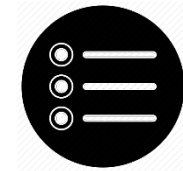
Q5. And what specifically attracted you to the area? Why did you want to visit here? DO NOT PROMPT. MULTIPLE RESPONSE.

BASE: All Palm Beach respondents (2018: n=171; 2019: n=174)

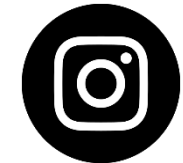
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Satisfaction & NPS



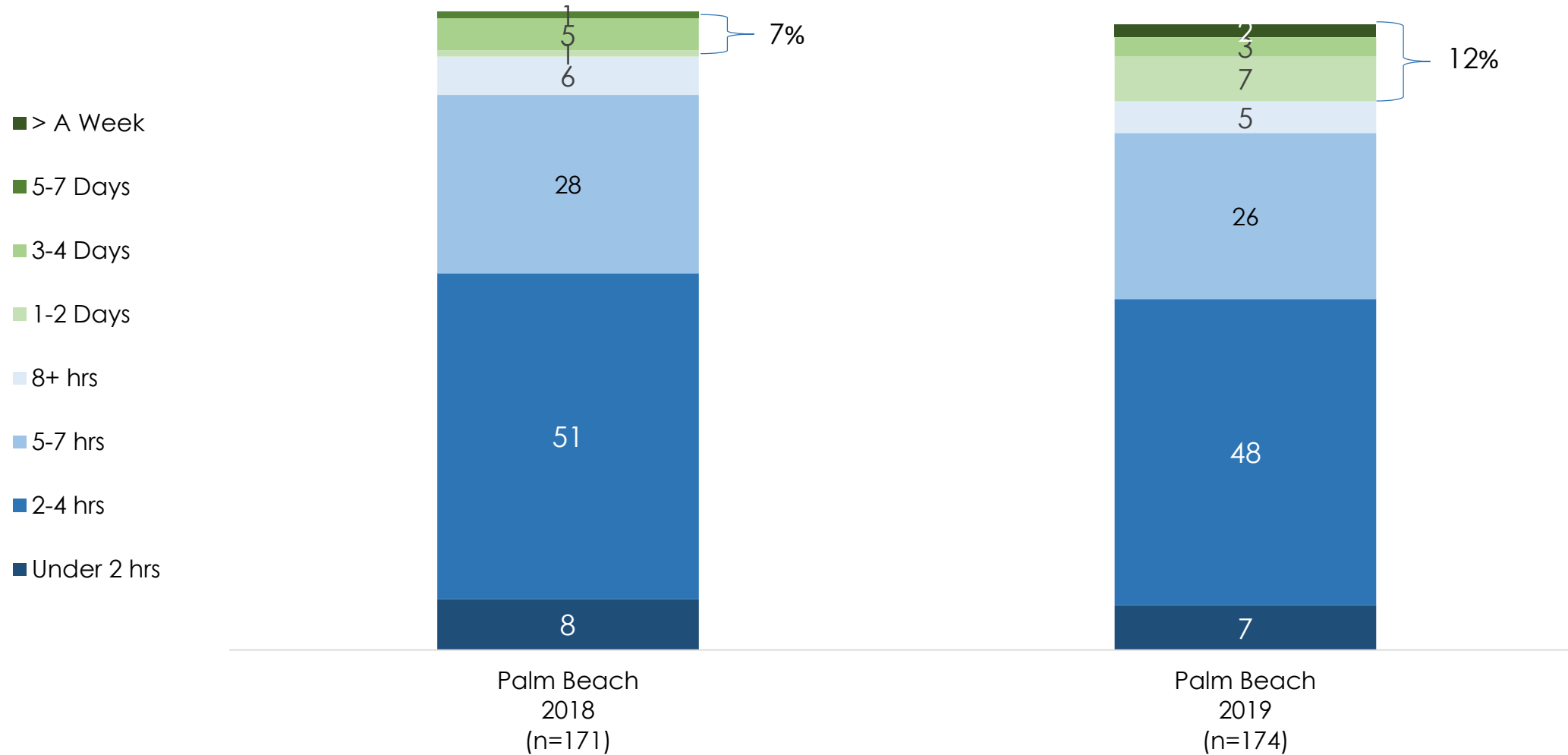


The majority of 2019 respondents were only day-tripping (88%). Overnight stays increased marginally (to 12%) in 2019.

A two to four hour stay was the most common for both years.



Anticipated length of stay



Q6. In total, how long do you anticipate that you will spend in this area?

BASE: All Palm Beach respondents (2018: n=171; 2019: n=174)



In both 2018 and 2019, visiting the beach was identified as a main activity.

The next most common activities in 2019 were sightseeing and eating at a restaurant or café (both increased in popularity). Whilst the proportion going for a walk or bicycle ride decreased.

Activities undertaken (or planned)

	Palm Beach 2018 (n=171) %	Palm Beach 2019 (n=174) %
Visit the beach	85	88
Sightseeing	50	56
Eat at restaurant or café	41	49
Go for a walk or bicycle ride	43	23
A drink at a bar or pub	12	10
Eat from a take-away outlet	35	7
Visit friends or relatives	13	5
Shopping	13	3
Take a ferry ride	1	2
Have a picnic/BBQ	11	2
Visit the markets	12	-
Visit the Lighthouse	7	-
Just relaxing	1	-
Visit the Aquarium	-	-
Other	3	-

Q10. What have you already done, and do you plan to do while here? READ OUT. MULTIPLE RESPONSE.

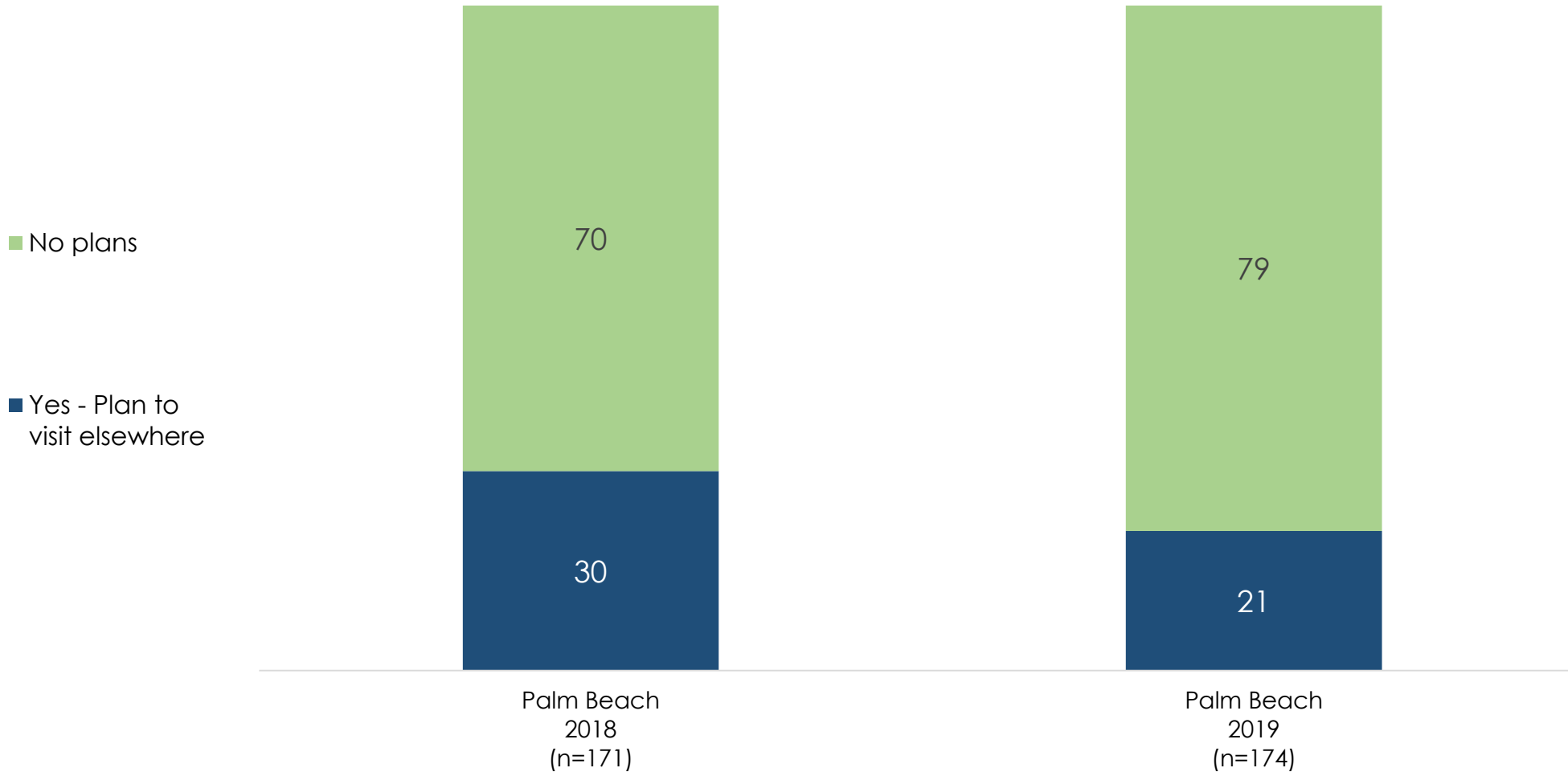
BASE: All Palm Beach respondents (2018: n=171; 2019: n=174)



In 2019, around one in five respondents planned to visit elsewhere on the Northern Beaches.

The proportion planning to go elsewhere decreased from the level recorded in 2018.

Visitation of other Northern Beaches locations



Q11. Are you planning on visiting any other places on the Northern Beaches during your visit today?

BASE: All Palm Beach respondents (2018: n=171; 2019: n=174)



Similarly to 2018, those also visiting other locations in 2019 tended to visit Avalon, Manly and/or Newport.

Where else they plan to visit

	Palm Beach 2018 (n=52) %	Palm Beach 2019 (n=27)* %
Avalon	23	22
Manly	15	22
Newport	19	19
Various Beaches NFI	-	11
Whale Beach	13	7
Dee Why	10	7
Bilgola	8	4
Mona Vale	4	4
Bayview	-	4
Narrabeen	12	-
Freshwater	2	-
Collaroy	2	-
Curl Curl	2	-
Balgowlah	4	-
Other	13	-

Q11. Are you planning on visiting any other places on the Northern Beaches during your visit today? SPECIFY

* WARNING: Small base size

BASE: Palm Beach respondents visiting other locations (2018: n=52; 2019: n=27)



Nine in ten respondents indicated that they would spend up to \$50 per person.

The average spend in 2019 was marginally lower than 2018 (\$29 and \$32 respectively).

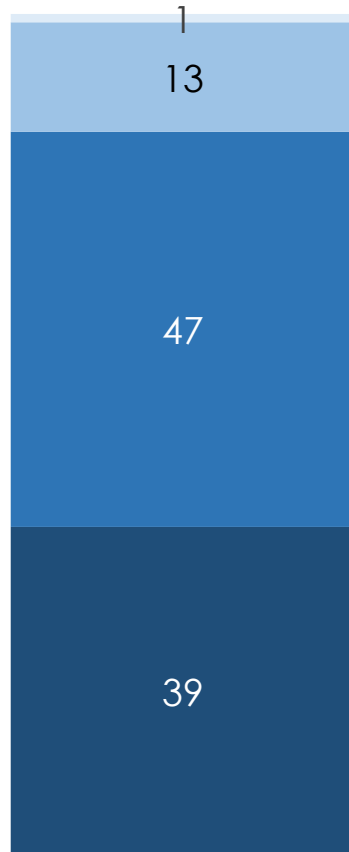
Spend level (per person)

AVERAGE SPEND

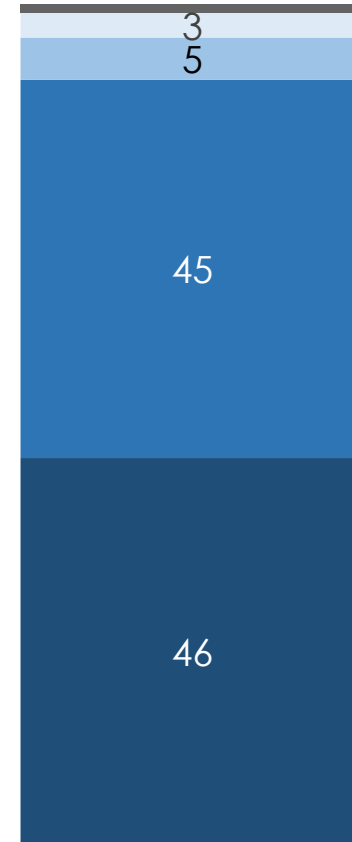
\$32

\$29

- Refused
- > \$500
- \$351-\$500
- \$201-\$350
- \$151-\$200
- \$101-\$150
- \$51-\$100
- \$20-\$50
- Under \$20



Palm Beach
2018
(n=171)



Palm Beach
2019
(n=171)

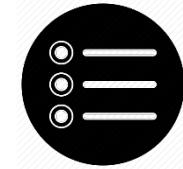
Q14. Approximately much money (PER PERSON) have you spent, or do you plan to spend on your visit here today?

BASE: All Palm Beach respondents (2018: n=171; 2019: n=174)

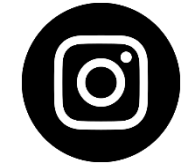
Who they are



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What they experienced



Satisfaction & NPS



About the NPS



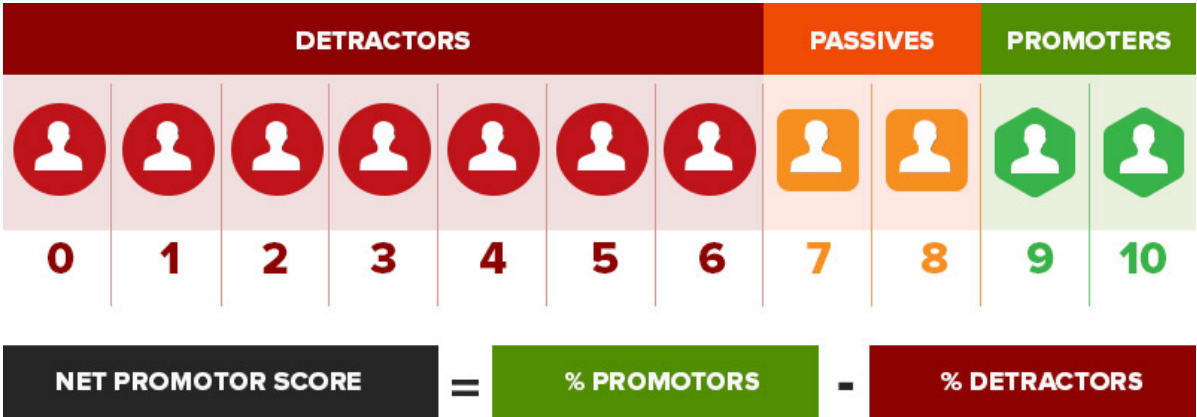
How to calculate & interpret NPS results

A Net Promoter Score (NPS) can range from -100 (where everyone is a 'detractor') to +100 (where everyone is a 'promoter').

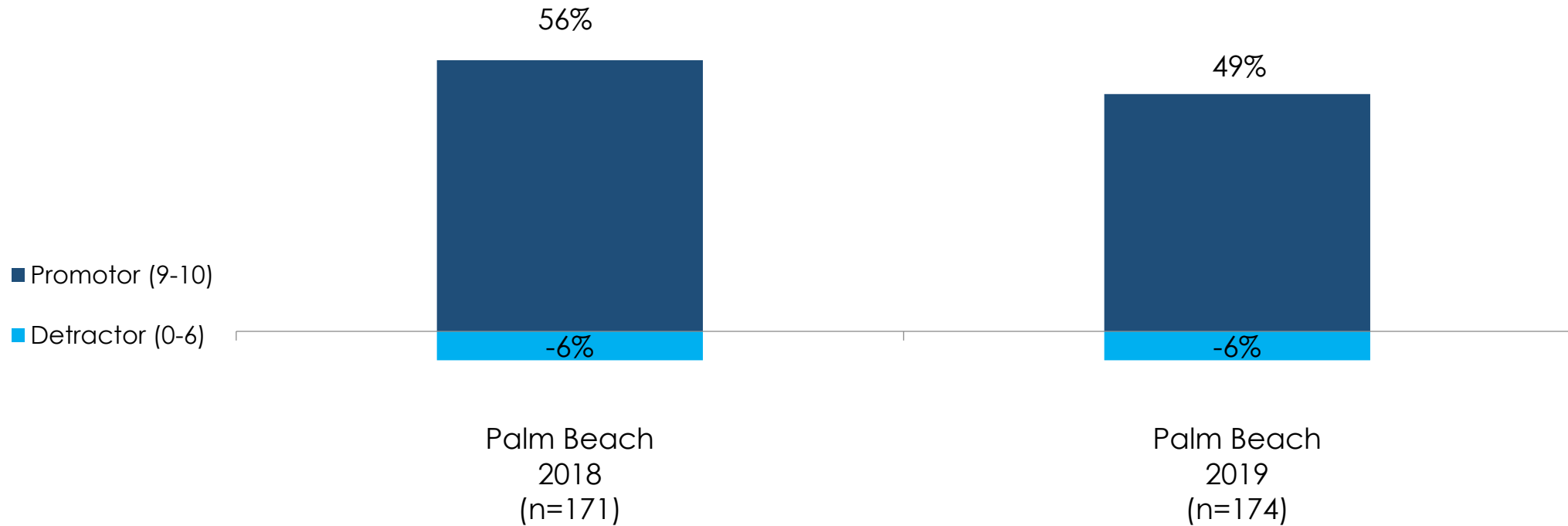
NPS is calculated by taking the percentage of all 'promoters' and subtracting the percentage of all 'detractors'.

The 'promoters' are those who rate their likelihood of recommending at 9-10 out of 10, while the 'detractors' are considered those who rate their likelihood of recommending at 0-6 out of 10.

While interpretation of what is considered a good NPS can be said to vary by industry, a score of 50 to 80 is typically considered 'very good' or even 'outstanding', while a score around 30-40 is universally seen as 'good', and anything above 20 is 'favourable'.



Net promotor score (NPS)



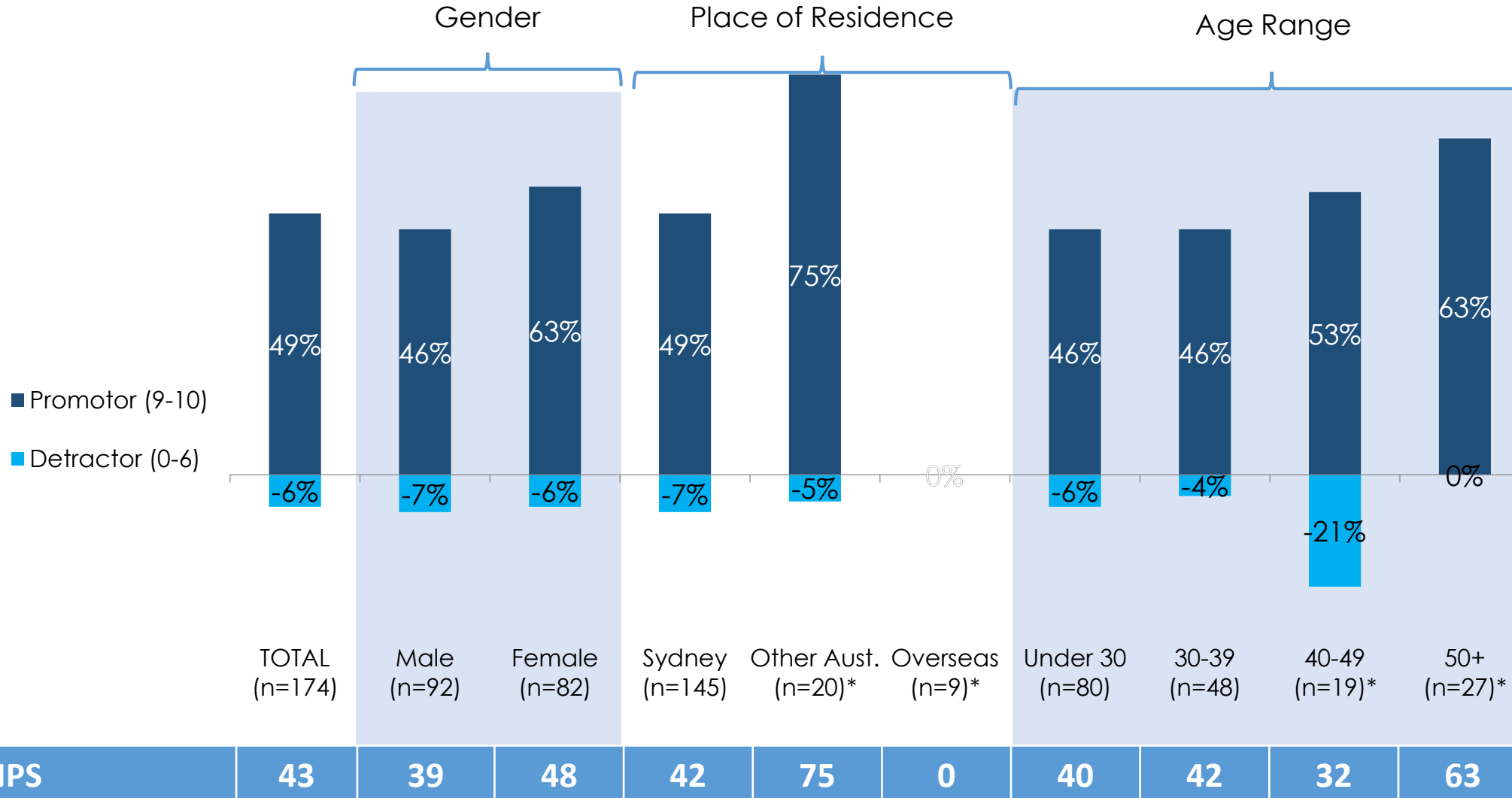
The overall NPS in 2019 was classified as good (at 43), which represents a slight decrease from 2018 (50).

NPS	50	43
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Q9. How likely would you be to recommend Palm Beach to family and friends as a place to visit using a scale of 0 to 10, where 0 is not at all likely to recommend and 10 is extremely likely to recommend?

BASE: All Palm Beach respondents (2018: n=171; 2019: n=174)

Net promotor score (NPS) – Palm Beach



Females were also more likely to recommend the Palm Beach location than males were (48 and 39 respectively).

All of the overseas visitors provided an neutral rating (7-8).

Respondents aged 50 and over were most likely to recommend Palm Beach, while those between 40 and 49 were least likely to.



Many respondents were unable to suggest a change for the Palm Beach location.

More food options and better and cheaper transport were the most common suggestions for 2019.

What would encourage a longer stay

	Palm Beach 2018 (n=171) %	Palm Beach 2019 (n=174) %
Better transport/cheaper transport	7	12
More food options/more cafes/restaurants	13	12
Its fine the way it is	29	12
More food options/more cafes/restaurants	-	5
Better shops/more diverse shops	1	5
More parking	9	5
More activities/events/attractions	5	5
Nothing	5	4
More/better toilets	3	2
More shade	2	2
BBQ area/picnic area/playground near the beach	4	2
Cheaper parking	18	-
Cheaper accommodation	4	-
More markets/hold markets more often	1	-
More walks/access to the National Park	2	-
Cheaper food and drink	2	-
Better weather	1	-
More seating	2	-
Cheaper (NFD)	-	-
Other	6	8
Don't know	7	38

Q8. What would encourage you, or other visitors like you, to stay longer or return to Palm Beach?

BASE: All Palm Beach respondents (2018: n=171; 2019: n=174)

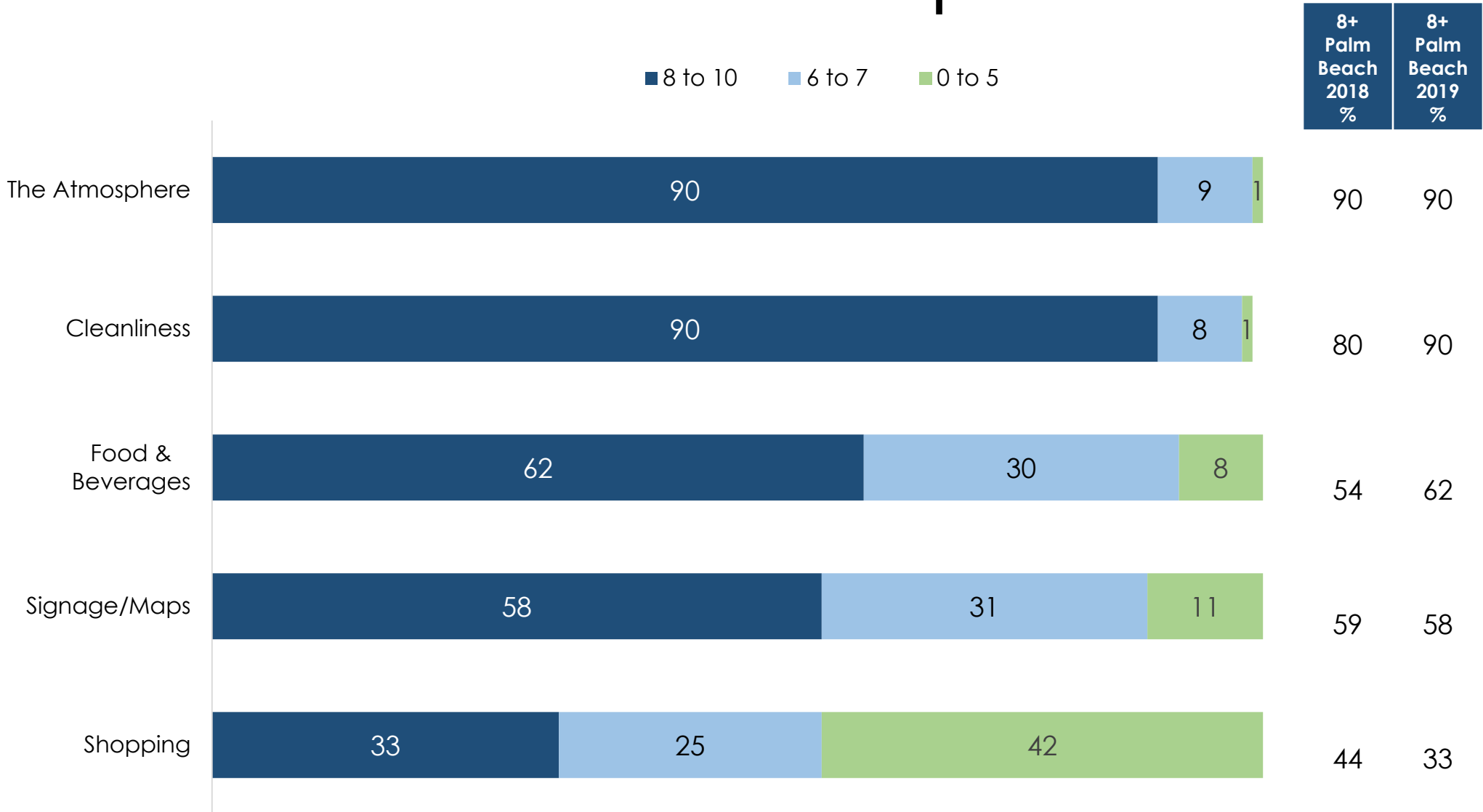
Satisfaction with various aspects of the visit



Satisfaction was high for most measured aspects.

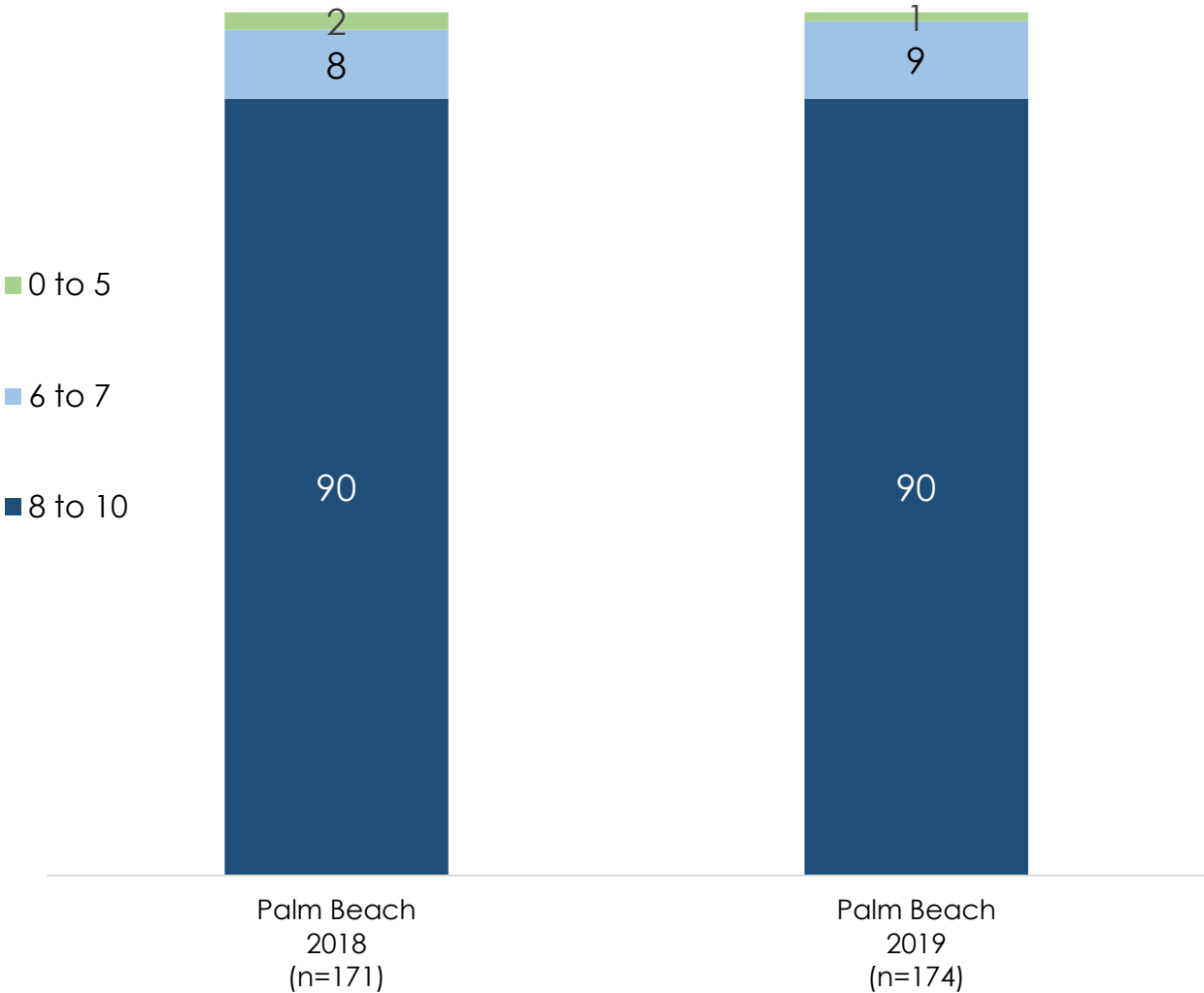
The highest satisfaction was expressed for the atmosphere and cleanliness of the location.

Satisfaction with cleanliness, food & beverages increased in 2019, whereas respondents satisfaction with shopping decreased.



Q12. Now I would like you to think about your overall experience in Palm Beach, how would you rate each of the following on a scale of 0 to 10, where 0 is VERY POOR and 10 is VERY GOOD Using any number from 1 to 10, what score would you give to indicate your satisfaction with?READ OUT. ROTATE.

Satisfaction with the atmosphere



Those who responded with scores of 5 or less	Palm Beach 2018 (n=3)* #	Palm Beach 2019 (n=1)* #
Have more shaded rest areas	n=3	n=1
More live music	n=2	-
Other	n=1	-

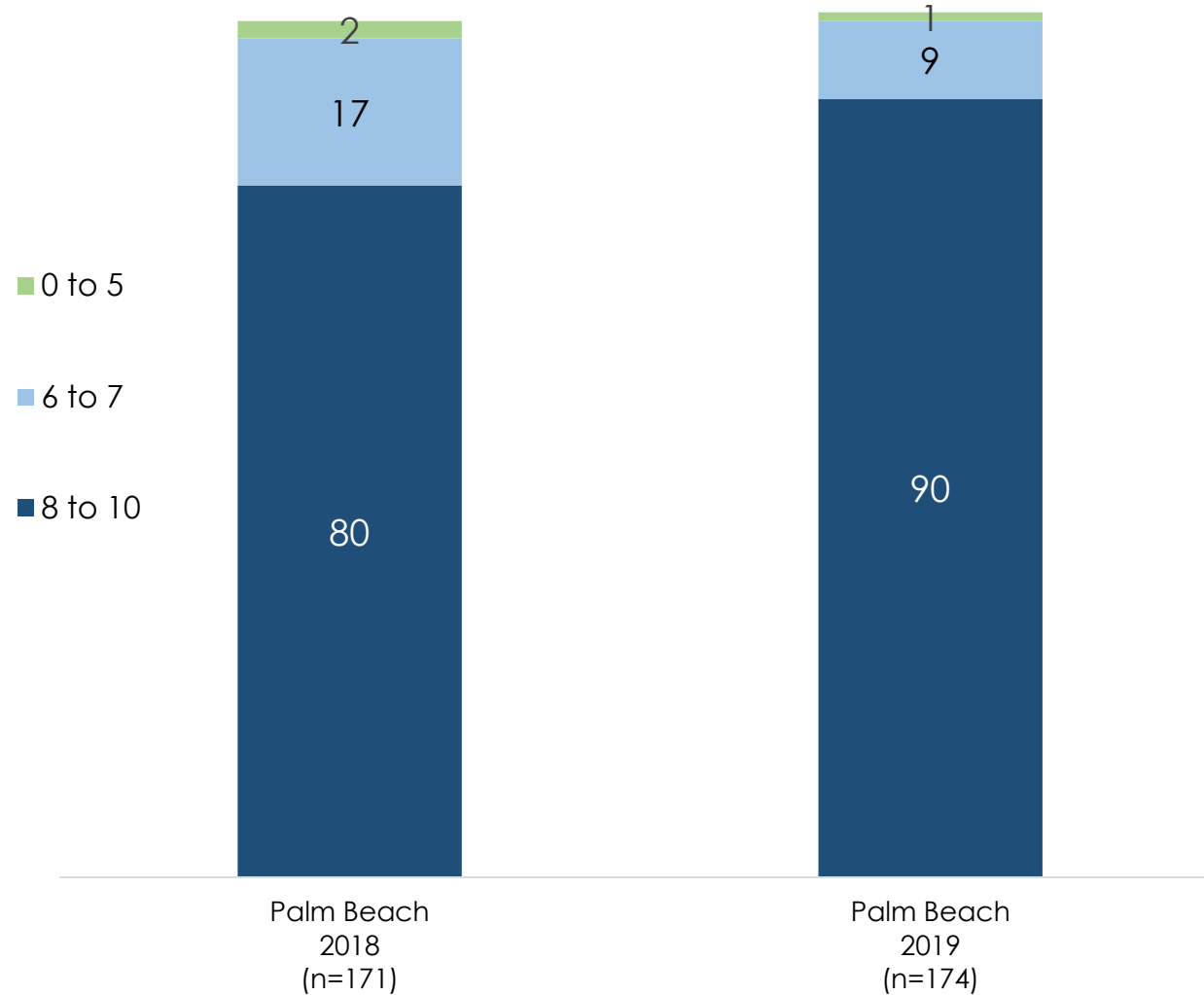
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Q13. IF SCORED 5 OR LESS: How could it be improved?

* WARNING: Small base size



Satisfaction with cleanliness



Those who responded with scores of 5 or less	Palm Beach 2018 (n=4)* #	Palm Beach 2019 (n=2)* #
By picking up litter	n=3	n=2
Cleaning up the toilets & putting soap in the bathrooms	n=1	n=2
Other	n=1	-

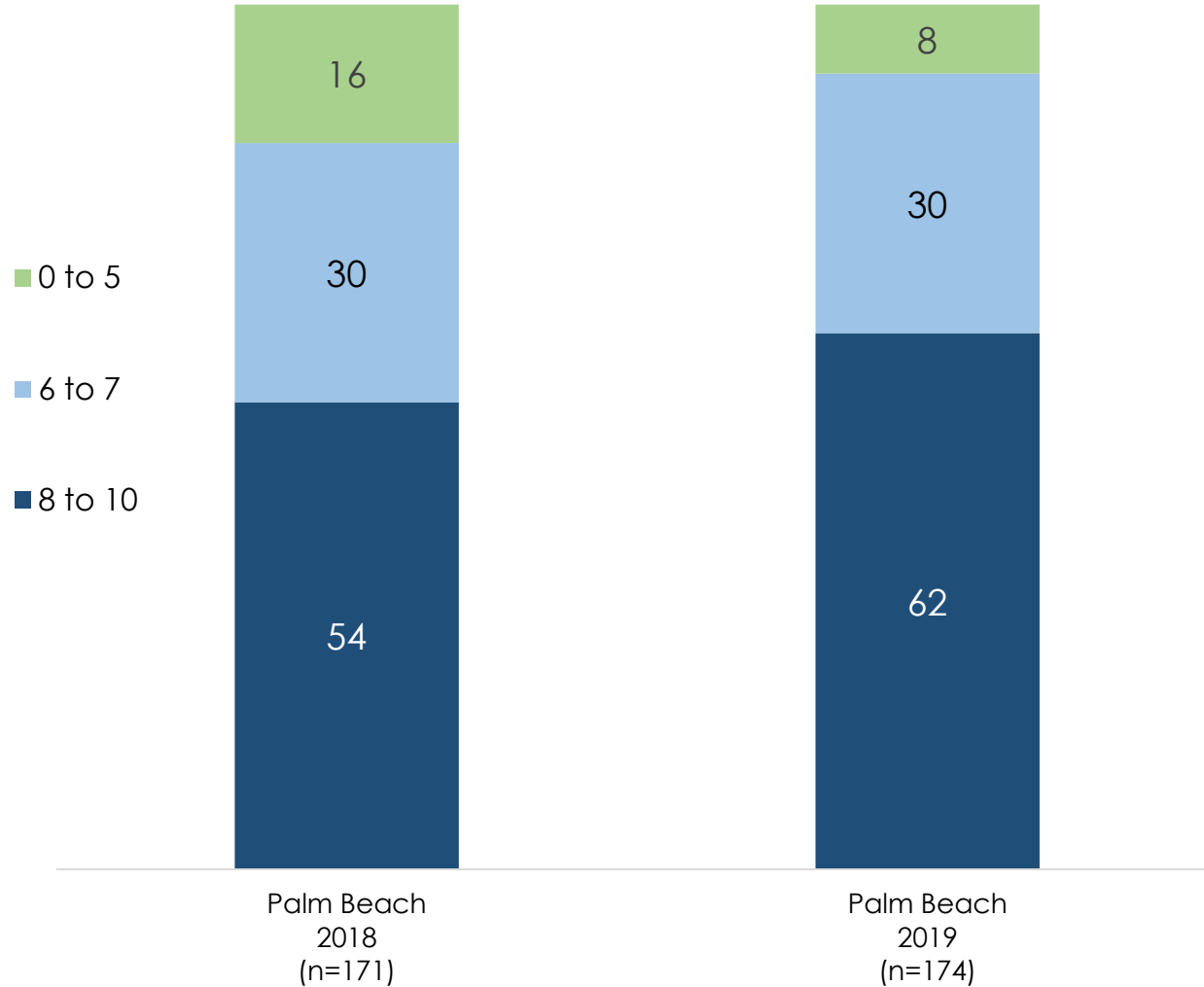
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Q13. IF SCORED 5 OR LESS: How could it be improved?

* WARNING: Small base size



Satisfaction with food & beverages



Those who responded with scores of 5 or less	Palm Beach 2018 (n=16)* #	Palm Beach 2019 (n=8)* #
Offer more options/greater diversity	n=6	n=6
Food is too expensive/have cheaper options	n=4	n=2
Offer better quality food/not just fries, hamburgers etc.	n=3	-
Maybe a pop up café/a coffee van	n=2	-
Food venues should stay open later	n=2	-
Have more family restaurants	n=2	-
Other	n=3	-
Not sure	n=1	-

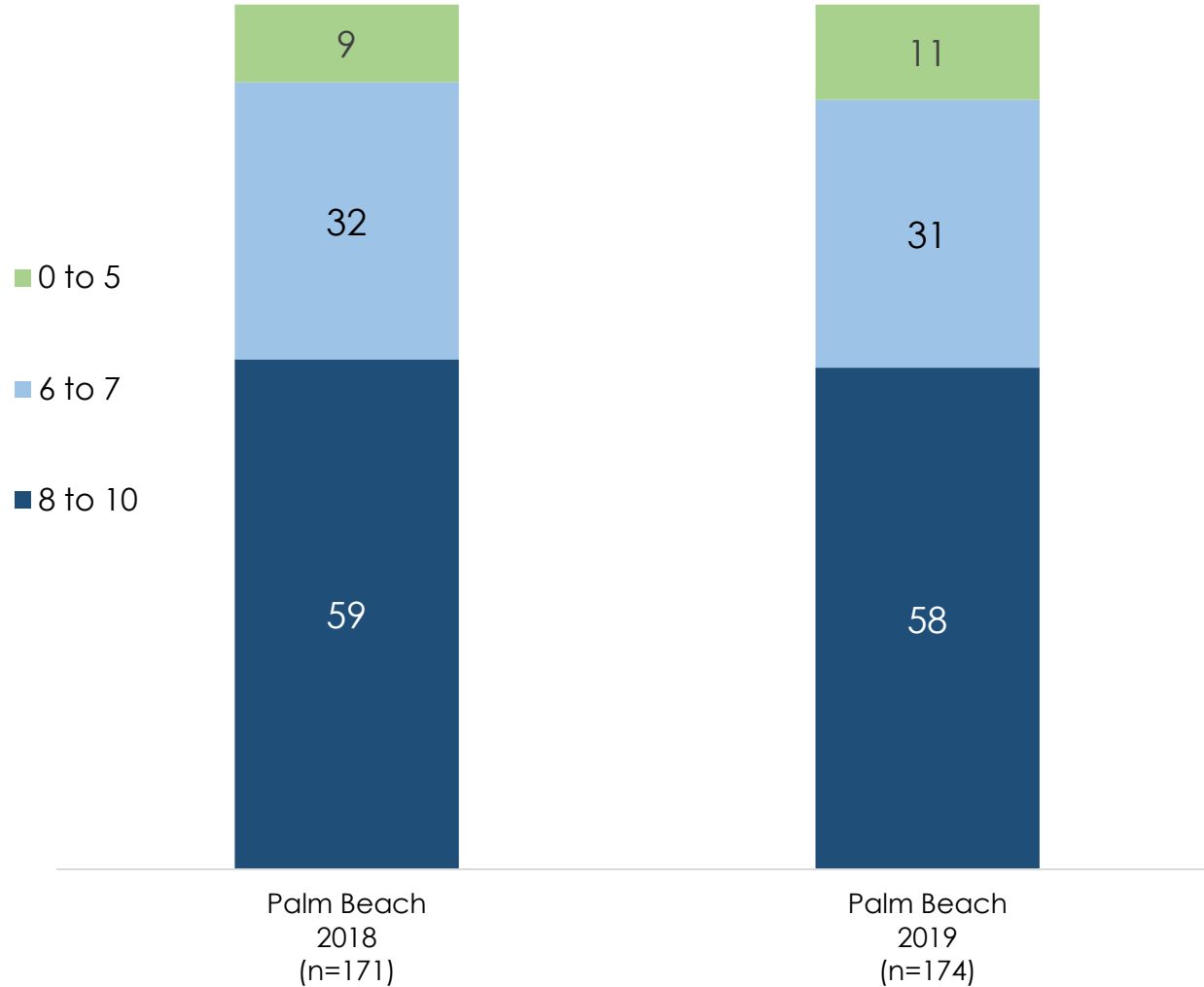
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Q13. IF SCORED 5 OR LESS: How could it be improved?

* WARNING: Small base size



Satisfaction with signage/maps



Those who responded with scores of 5 or less	Palm Beach 2018 (n=11)* #	Palm Beach 2019 (n=15)* #
Have more signs/maps	n=5	n=4
Have bigger/more obvious signs	n=3	n=4
Put in signs indicating the way to the beach	n=1	n=3
Maps that highlight other attractions/walking trails/galleries/restaurants	-	n=3
Other	n=4	n=1
Not sure	n=2	-

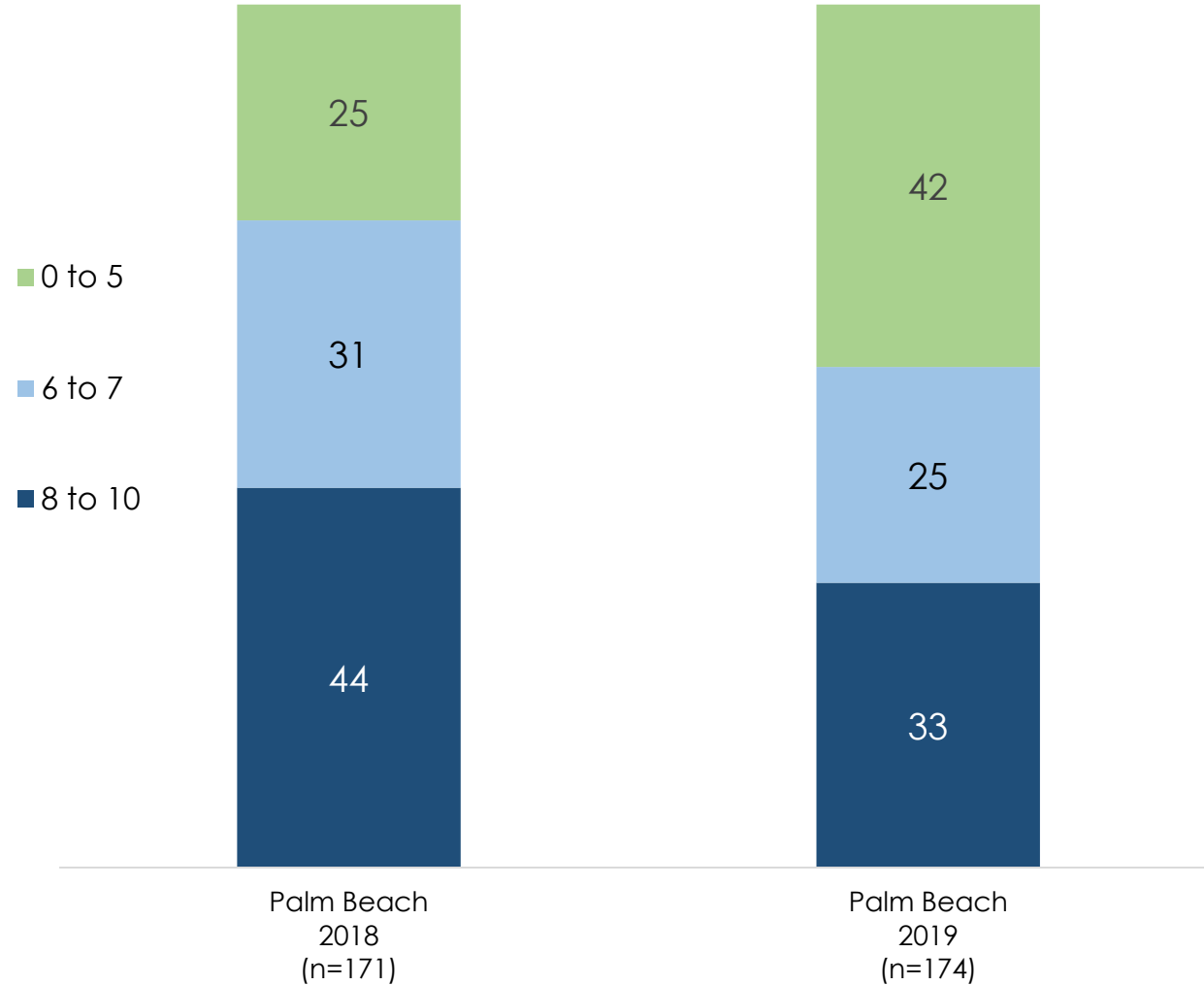
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Q13. IF SCORED 5 OR LESS: How could it be improved?

* WARNING: Small base size



Satisfaction with shopping



Those who responded with scores of 5 or less	Palm Beach 2018 (n=15)* #	Palm Beach 2019 (n=20)* #
Have more shops	n=4	n=11
Fine the way it is	-	n=5
Shops aren't needed/reduce them/focus on natural beauty	-	n=3
Have a broader range of shops/greater diversity	n=6	n=1
Cheaper shops	n=1	-
Other	n=5	-
Not sure	n=1	-

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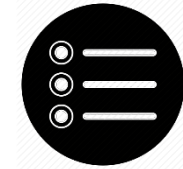
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Manly

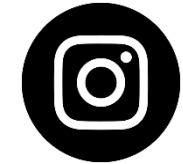
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What attracted them



What they experienced



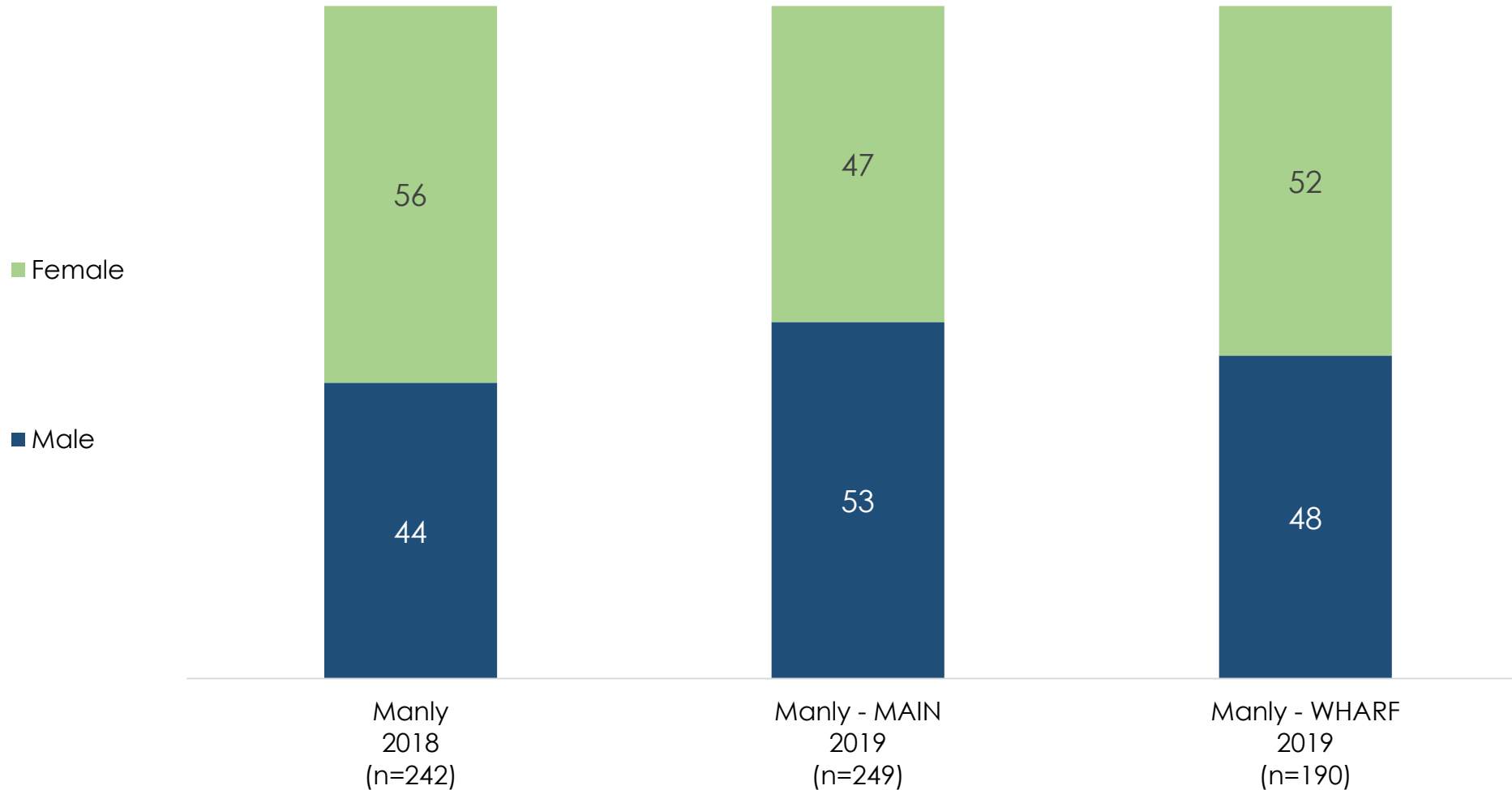
Satisfaction & NPS





There was a slightly higher proportion of male respondents in 2019 for both Manly locations.

Gender of respondents

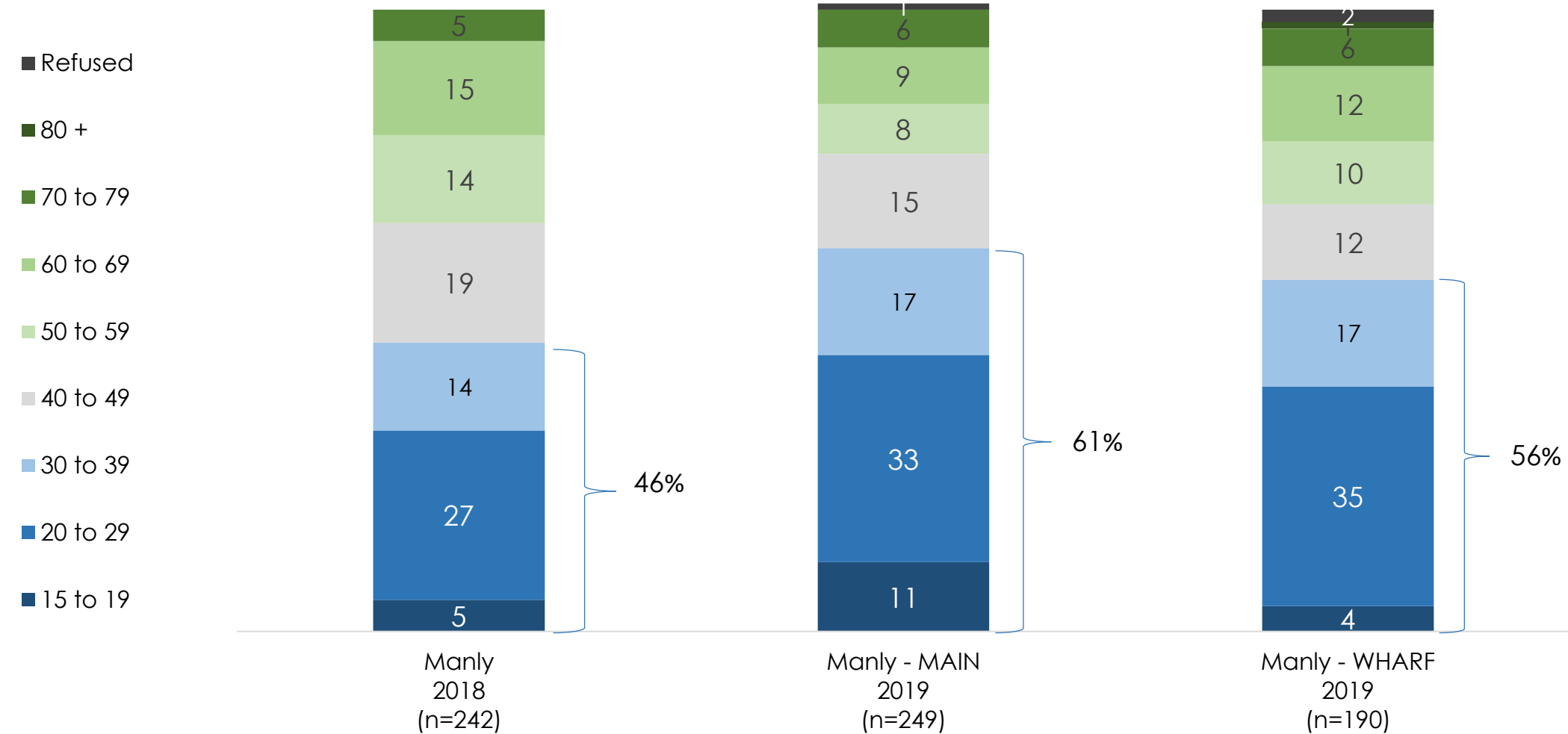


i. RECORD GENDER

BASE: All Manly respondents (2018: n=242; 2019 Main Area: n=249; 2019 Wharf/Wst Esplanade n=190)



Age range of respondents



The 2019 respondent base had a younger age profile than in 2018 - with 61% under 40 years old in the Main Manly location, compared to 46% in 2018.



As was the case in 2018, many visitors were in attendance with a partner and/or friends.

Who they were visiting with

	Manly 2018 (n=242) %	Manly MAIN 2019 (n=249) %	Manly WHARF 2019 (n=190) %
Partner	45	43	37
Friends	30	36	31
Children	13	18	19
Self only	14	12	5
Family NFD	6	6	5
Parent(s)	2	1	3
Sibling(s)	3	1	1
Work colleagues	1	-	2
Grandchildren	1	-	1

ii. Who are you attending this area with?

BASE: All Manly respondents (2018: n=242; 2019 Main Area: n=249; 2019 Wharf/Wst Esplanade n=190)



Place of residence

	Manly 2018 (n=242) %	Manly MAIN 2019 (n=249) %	Manly WHARF 2019 (n=190) %
Sydney	39	40	39
Inner City	7	4	8
Lower Northern	6	7	4
Eastern Suburbs	5	3	3
Central West	4	6	5
Central Northern	4	4	1
St. George-Sutherland	3	3	6
Inner West	3	3	4
Canterbury-Bankstown	1	-	3
Northern Beaches	2	1	2
Blacktown	1	3	-
Outer West	2	3	1
Fairfield-Liverpool & Outer South West	2	3	3
Other NSW	6	5	3
Other Australia	10	10	9
Overseas	45	45	49
UK	12	11	12
USA	7	7	4
New Zealand	-	4	1
Canada	3	3	2
France	2	2	1
Germany	2	2	3
Other	16	16	16

While there was variance at the LGA & Country level, the broad composition of visitors in 2019 was consistent with those from 2018 – with two fifths of the respondent base residing in Sydney.



The ferry was the most common mode of transport for all age groups. This was followed by the bus for respondents aged 15-29 years and commuting in a car for respondents from the two eldest age brackets.

Age	Total (n=249) %	15-29 years (n=109) %	30-49 years (n=80) %	50+ years (n=58) %
Ferry	71	72	61	67
Car	21	17	28	14
Bus	17	20	15	10
Bicycle	-	-	1	-

Q4. And how did you get here today? DO NOT PROMPT. MULTIPLE RESPONSE.

BASE: All Palm Beach respondents (n=249)



Private letting services and staying with friends or relatives remain the most commonly used accommodation types.

Accommodation type used

	Manly 2018 (n=39)* %	Manly MAIN 2019 (n=18)* %	Manly WHARF 2019 (n=31)* %
Private letting (e.g. Airbnb)	33	33	32
With friends/relatives (unpaid)	31	28	39
Motel/Backpacker	26	22	6
Hotel	10	17	19

Q7. What style of accommodation are you using?

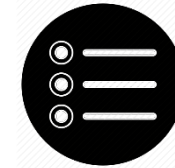
* WARNING: Small base size

BASE: Manly respondents indicating that they were staying overnight (2018: n=39; 2019 Main Area: n=18; 2019 Wharf/Wst Esplanade n=31)

Who they are



What attracted them



What they experienced



Satisfaction & NPS



Information sources

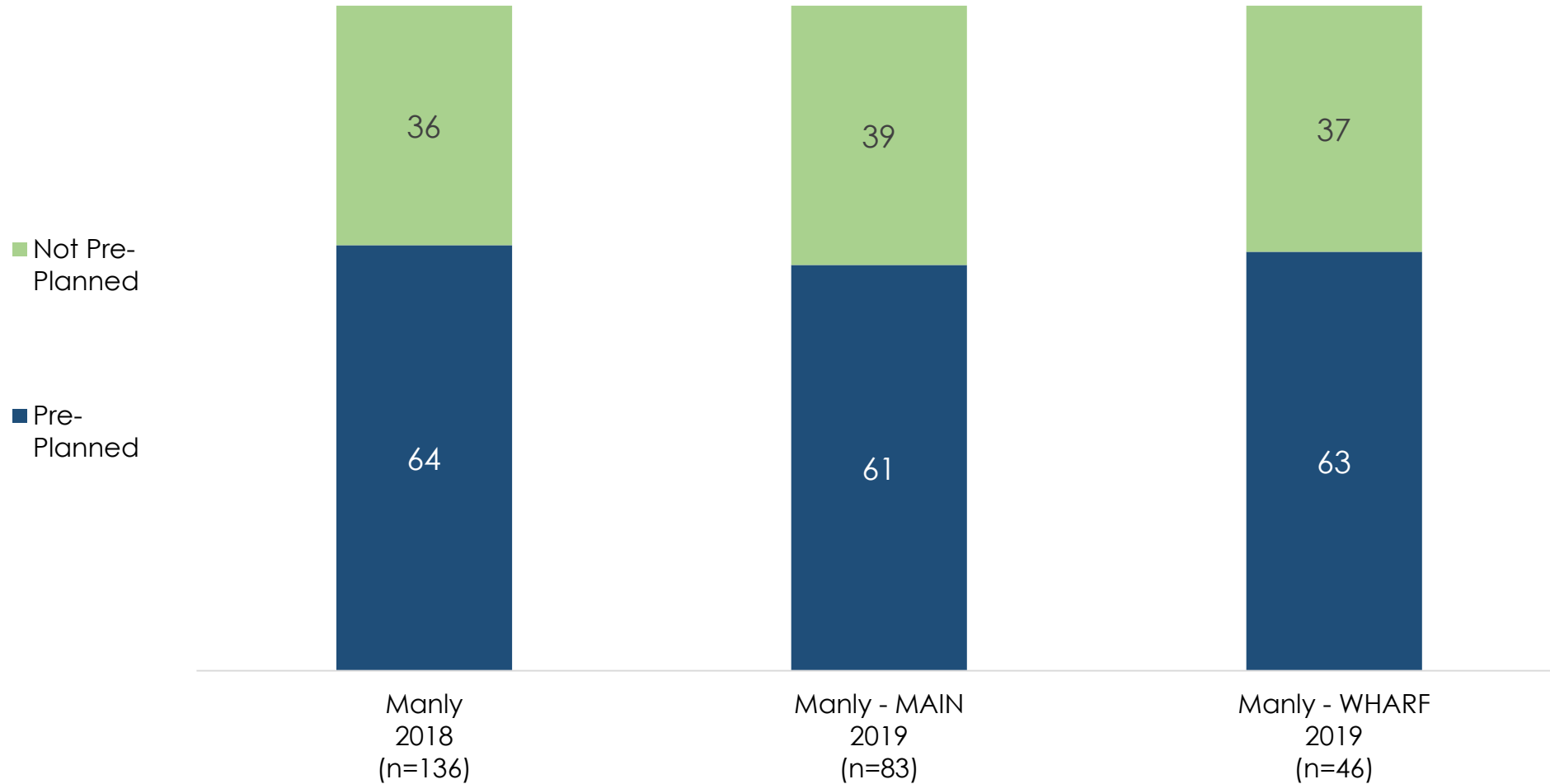
	Manly 2018 (n=242) %	Manly MAIN 2019 (n=249) %	Manly WHARF 2019 (n=190) %
Word of mouth (in person)	50	34	45
Previous visit/experience	45	59	49
A description in a travel guide	2	7	3
Internet/website	1	5	5
Through social media	-	7	2
We just Googled "Sydney beach"	-	2	2
We live/used to live in Sydney	1	1	2
Part of a set tour	-	1	1
Everybody knows it/its iconic	3	-	-
We just came across it	2	-	-
Friends/family live here	1	-	-
Other	5	-	-
Don't know	1	-	-



Word of mouth, and previous visiting experiences continue to be the most common information sources.

The 'Internet/website' sources were mainly Google searches.

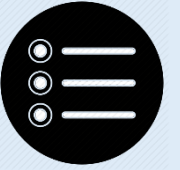
Incidence of visit being pre-planned



The majority of those from Interstate or Overseas indicated that their visit to Manly was pre-planned.

V. Was your visit to Manly/Palm Beach planned before you arrived in Sydney?

BASE: Manly respondents from Interstate or Overseas (2018: n=136; 2019 Main Area: n=83; 2019 Wharf/Wst Esplanade n=46)



The beach was the key drawcard for both Manly locations – but less so for the Manly Wharf/West Esplanade respondents.

Specific attractions resulting in visit

	Manly 2018 (n=242) %	Manly MAIN 2019 (n=249) %	Manly WHARF 2019 (n=190) %
The beach	71	88	64
Visiting friends and family	15	14	21
The ferry ride	21	8	5
The markets	3	-	-
The food/cafes	5	-	-
The ambience/atmosphere	5	-	-
The views/it's a pretty area	1	-	-
General sightseeing	3	-	-
Its less crowded than other Sydney beaches	2	-	-
Recommendation/we were told it was good	4	-	-
There are good walks/trails	3	-	-
Business purposes	2	2	5
Other	16	16	22

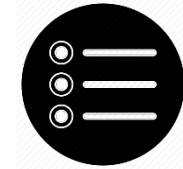
Q5. And what specifically attracted you to the area? Why did you want to visit here?

BASE: All Manly respondents (2018: n=242; 2019 Main Area: n=249; 2019 Wharf/Wst Esplanade n=190)

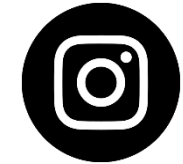
Who they are



What attracted them



What they experienced



Satisfaction & NPS

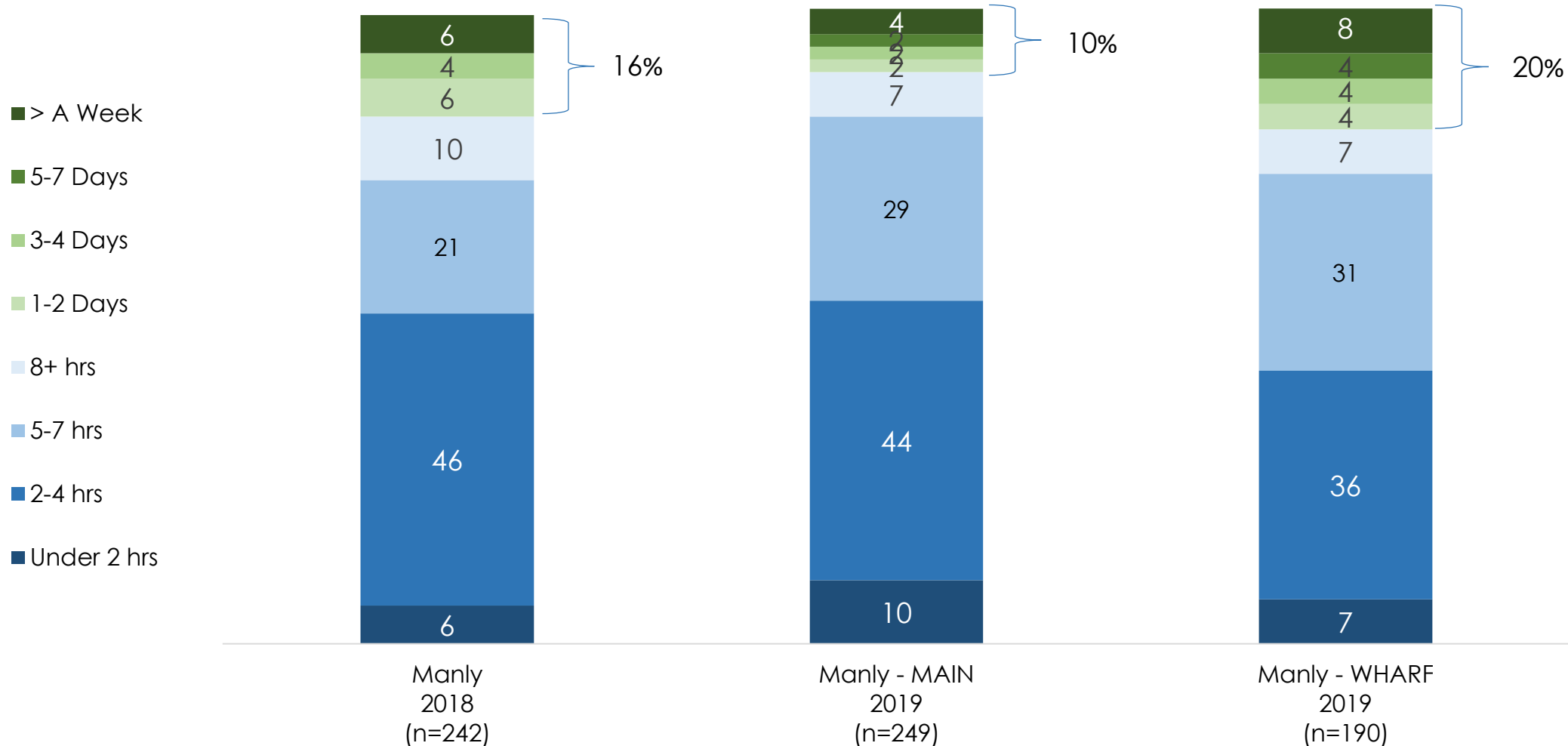




The large majority of 2019 respondents were only day-tripping (90% for Manly Main and 80% for Manly Wharf).

A two to four hour stay was the most common for each location.

Anticipated length of stay



Q6. In total, how long do you anticipate that you will spend in this area?

BASE: All Manly respondents (2018: n=242; 2019 Main Area: n=249; 2019 Wharf/Wst Esplanade n=190)



The beach was identified as a main activity for both Manly locations – though the intention of visiting the beach was lower amongst the Manly Wharf respondents.

Eating at a restaurant or take-away shop was also popular.

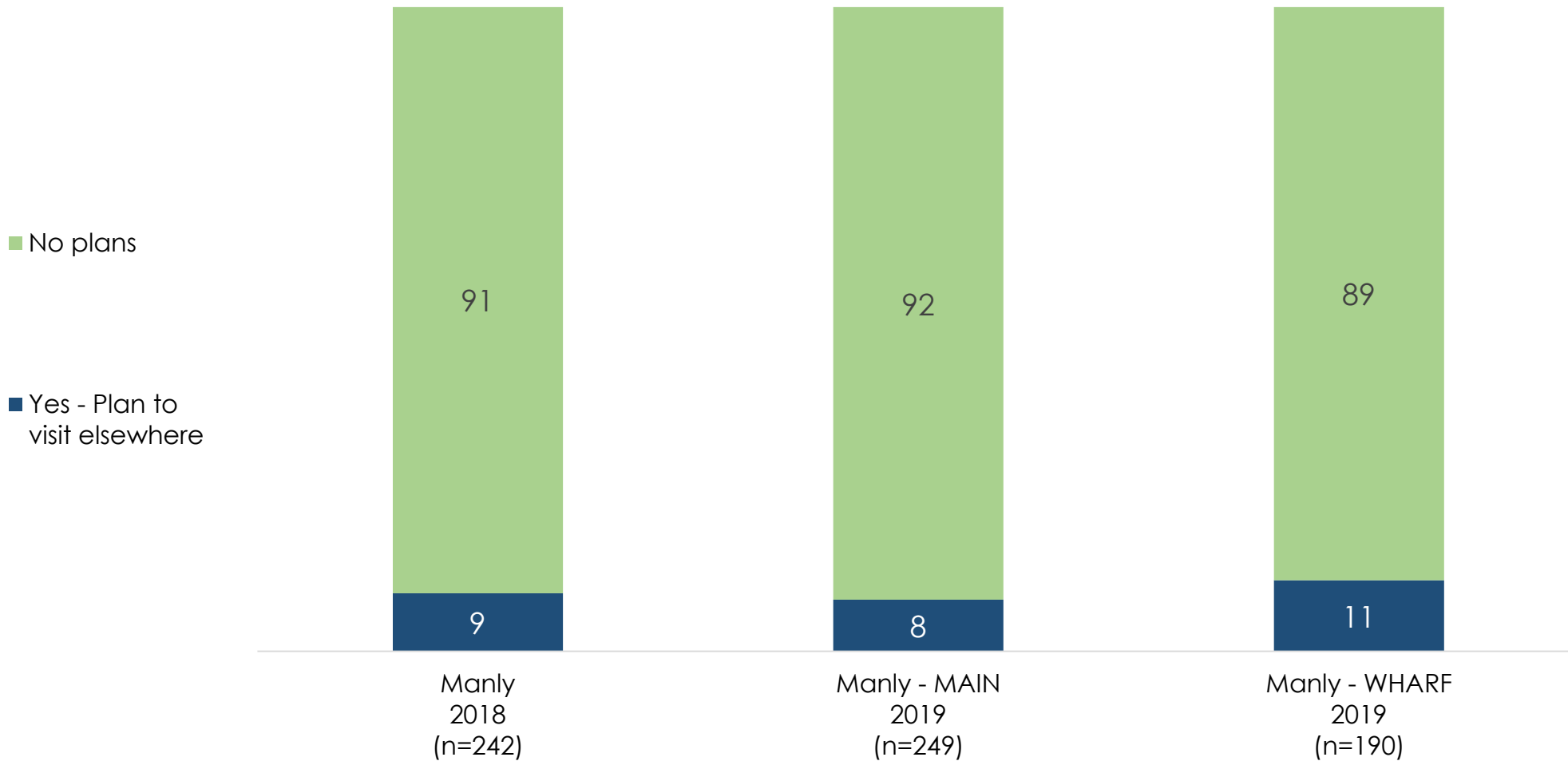
Activities undertaken (or planned)

	Manly 2018 (n=242) %	Manly MAIN 2019 (n=249) %	Manly WHARF 2019 (n=190) %
Visit the beach	90	88	66
Eat at restaurant or café	61	53	53
Go for a walk or bicycle ride	64	32	31
Sightseeing	52	25	24
Eat from a take-away outlet	38	27	16
Shopping	51	27	20
A drink at a bar or pub	38	23	18
Visit friends or relatives	20	12	15
Visit the markets	2	-	1
Have a picnic/BBQ	-	-	1
Take a ferry ride	1	1	2
Just relaxing	1	-	1
Visit the Aquarium	2	-	-
Other	5	1	1



Around one in ten of the 2019 Manly respondents planned to visit elsewhere on the Northern Beaches.

Visitation of other Northern Beaches locations



Q11. Are you planning on visiting any other places on the Northern Beaches during your visit today?

BASE: All Manly respondents (2018: n=242; 2019 Main Area: n=249; 2019 Wharf/Wst Esplanade n=190)



Those also visiting other locations (in 2019) were most likely to visit Dee Why.

Where else they plan to visit

	Manly 2018 (n=22)* %	Manly MAIN 2019 (n=18)* %	Manly WHARF 2019 (n=16)* %
Dee Why	14	28	25
Freshwater	14	22	6
Various Beaches	-	17	6
Manly	9	6	-
Fairlight	-	6	6
Newport	-	-	6
Shelley Beach	23	-	13
Whale Beach	-	-	6
Palm Beach	9	-	13
Balgowlah	-	-	13
Curl Curl	5	11	-
Narrabeen	14	-	-
Collaroy	5	-	-
Avalon	5	-	-
Other	14	11	6

Q11. Are you planning on visiting any other places on the Northern Beaches during your visit today?

* WARNING: Small base size

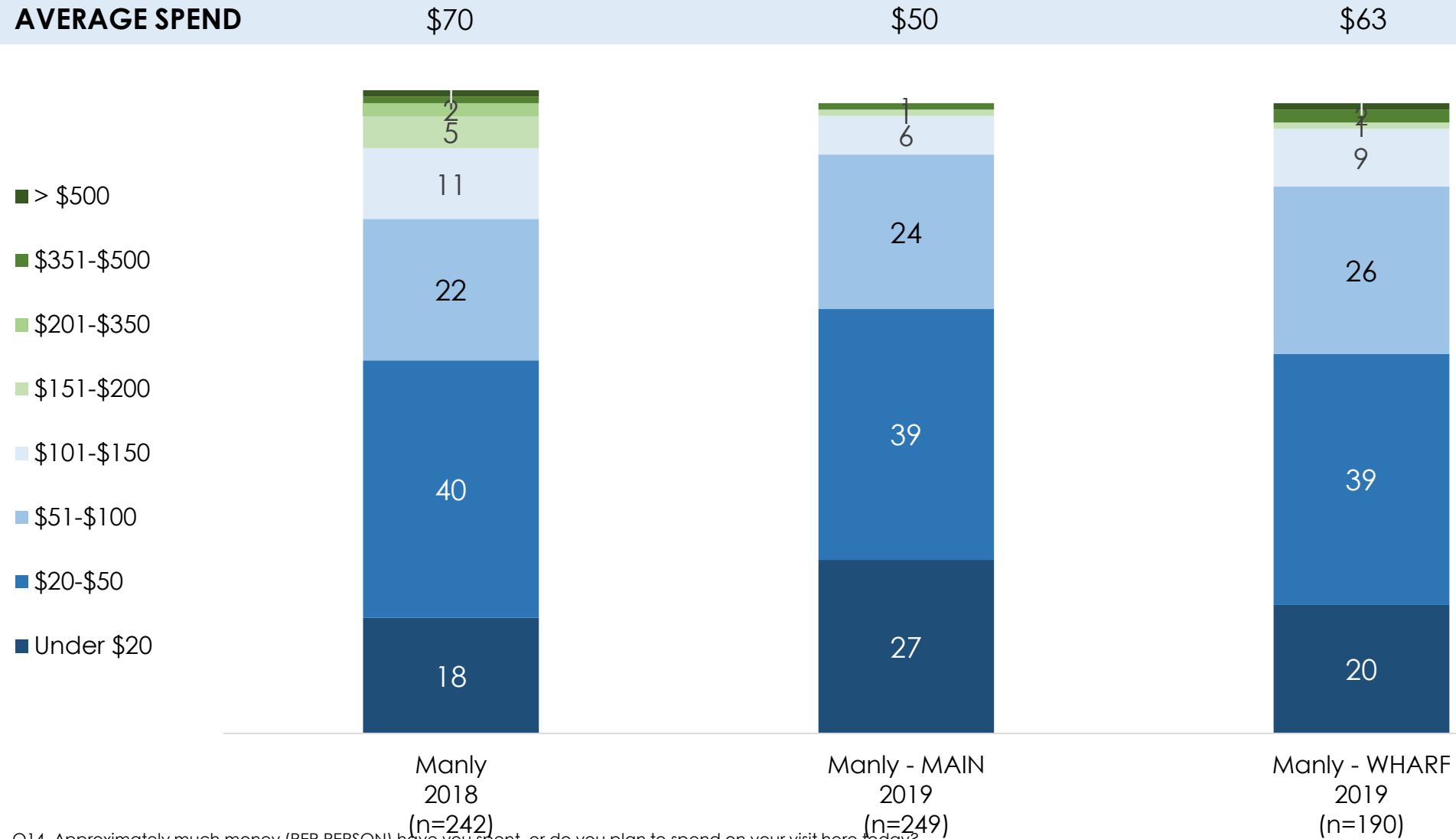
BASE: Manly respondents visiting other locations (2018: n=22; 2019 Main Area: n=; 2019 Wharf/Wst Esplanade n=)



The majority of respondents at both Manly locations indicated that they would spend up to \$50 per person.

The average spend was higher amongst Manly Wharf respondents (\$63, compared to \$50).

Spend level (per person)



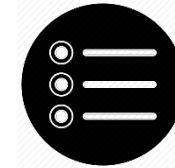
Q14. Approximately much money (PER PERSON) have you spent, or do you plan to spend on your visit here today?

BASE: All Manly respondents (2018: n=242; 2019 Main Area: n=249; 2019 Wharf/Wst Esplanade n=190)

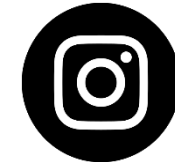
Who they are



What attracted them



What they experienced



Satisfaction & NPS





About the NPS

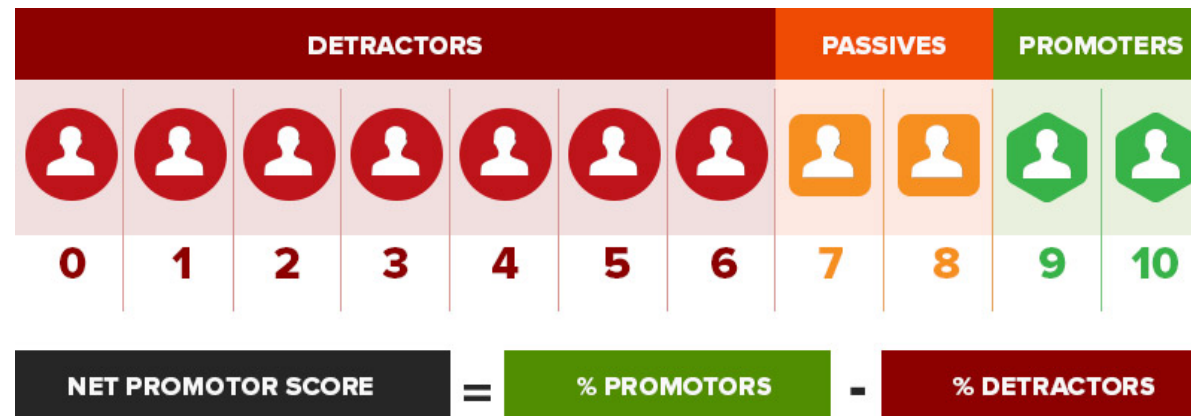
How to calculate & interpret NPS results

A Net Promoter Score (NPS) can range from -100 (where everyone is a 'detractor') to +100 (where everyone is a 'promoter').

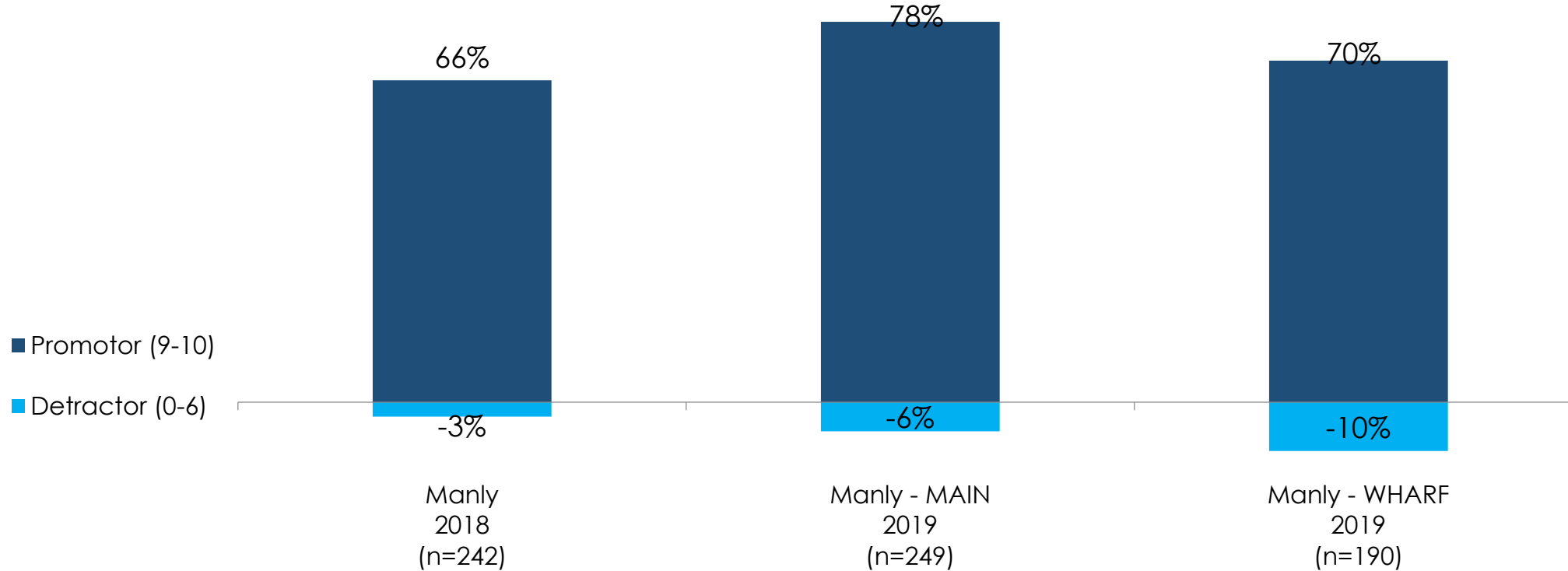
NPS is calculated by taking the percentage of all 'promoters' and subtracting the percentage of all 'detractors'.

The 'promoters' are those who rate their likelihood of recommending at 9-10 out of 10, while the 'detractors' are considered those who rate their likelihood of recommending at 0-6 out of 10.

While interpretation of what is considered a good NPS can be said to vary by industry, a score of 50 to 80 is typically considered 'very good' or even 'outstanding', while a score around 30-40 is universally seen as 'good', and anything above 20 is 'favourable'.

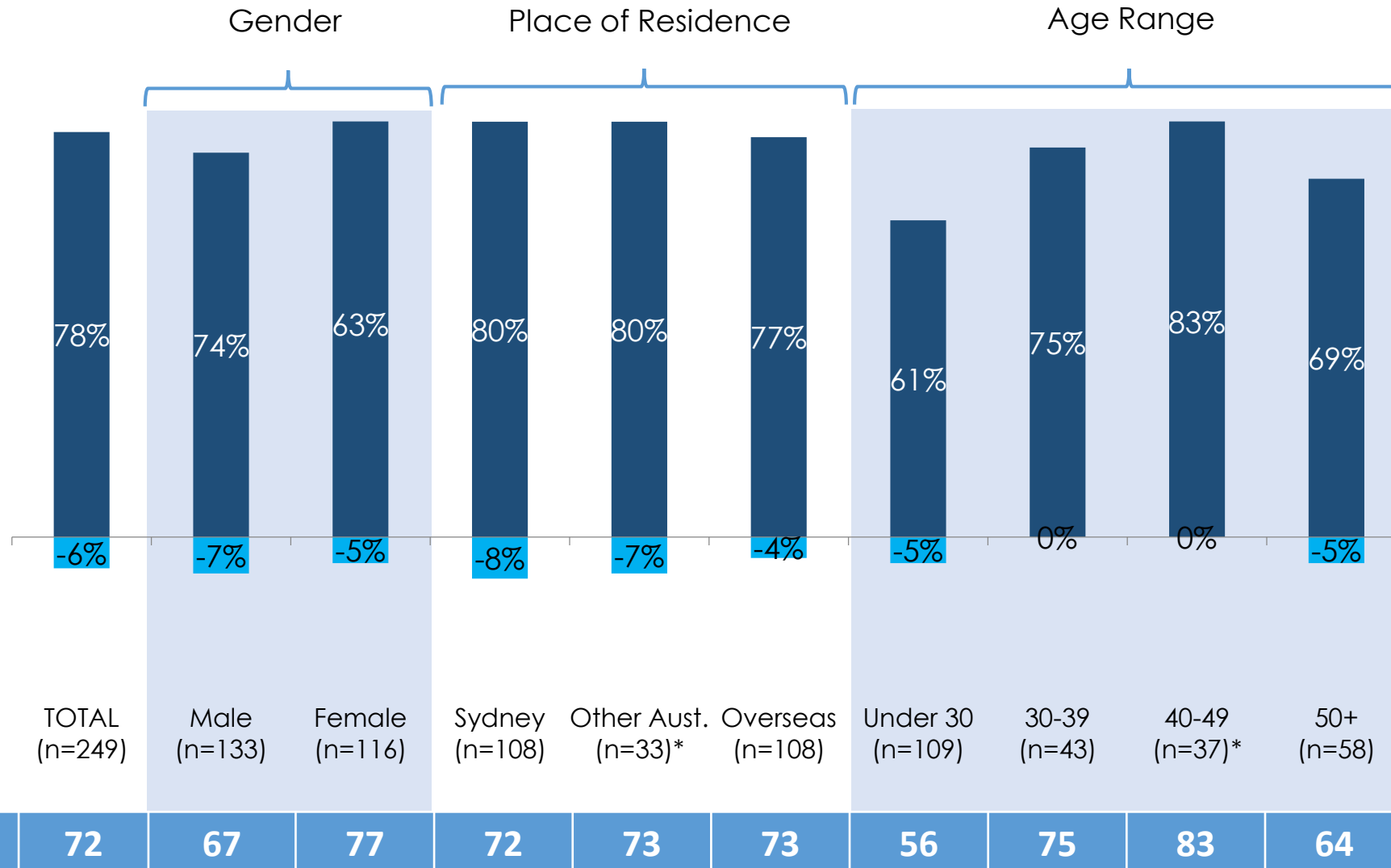


Net promotor score (NPS)



The NPS for Manly is very high (at 60 or more), and was higher for the respondents in the Main area than it was for those at Manly Wharf/West Esplanade.

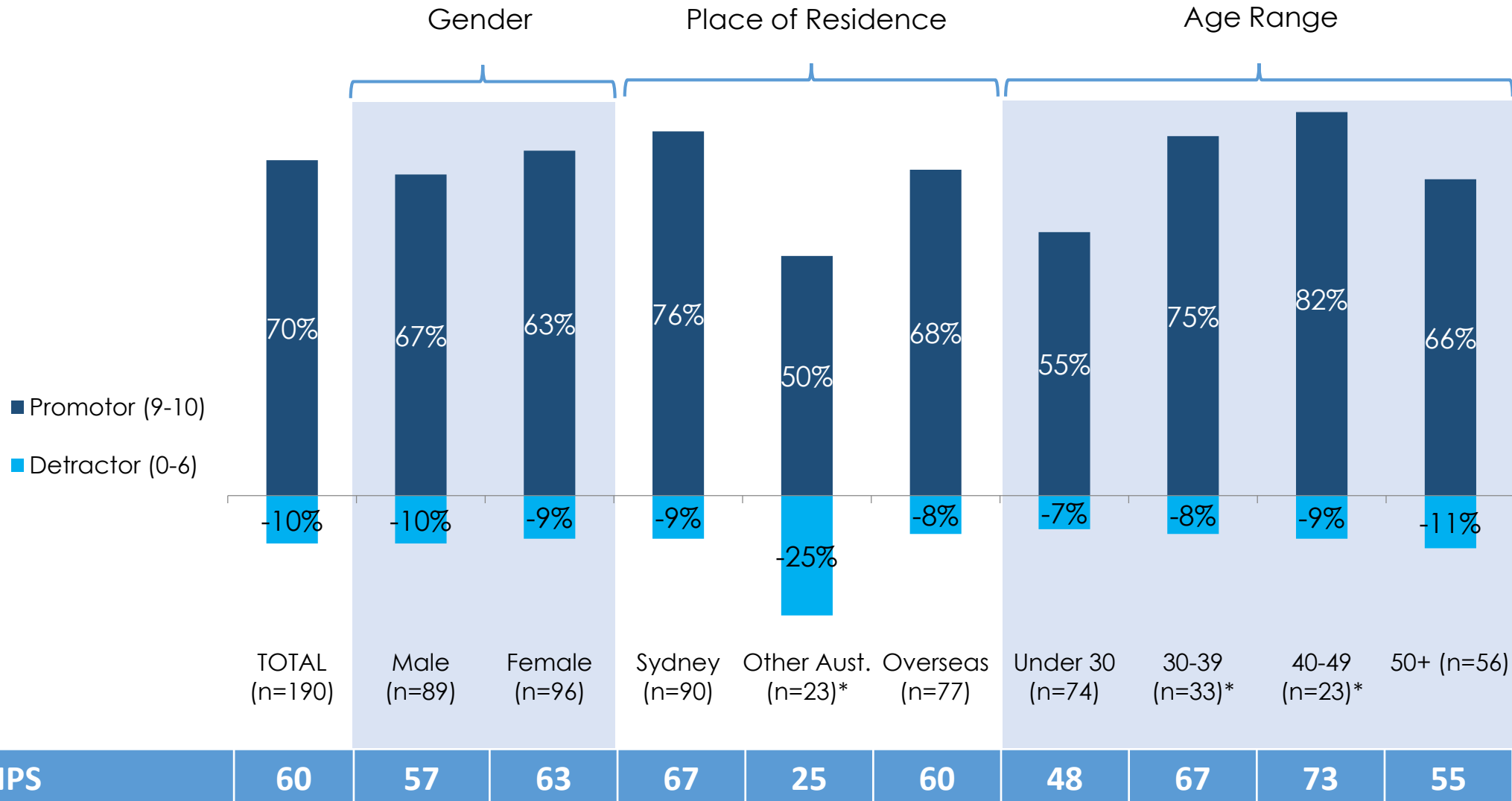
Net promotor score (NPS) – Manly MAIN



Amongst the Manly visitors, female respondents were more likely to recommend the location than males were (77 and 67 respectively).

The mid age groups were also more likely to recommend Manly than the older and younger groups.

Net promotor score (NPS) – Manly WHARF



Amongst the Manly WHARF area visitors, female respondents were more slightly likely to recommend the location than males were (63 and 57 respectively).

The Sydney residents were also more likely to recommend the Manly WHARF area than other visitors.



Many respondents were unable to suggest a change for either Manly location.

More food options, better transport, more activities and more parking were the most common suggestions made.

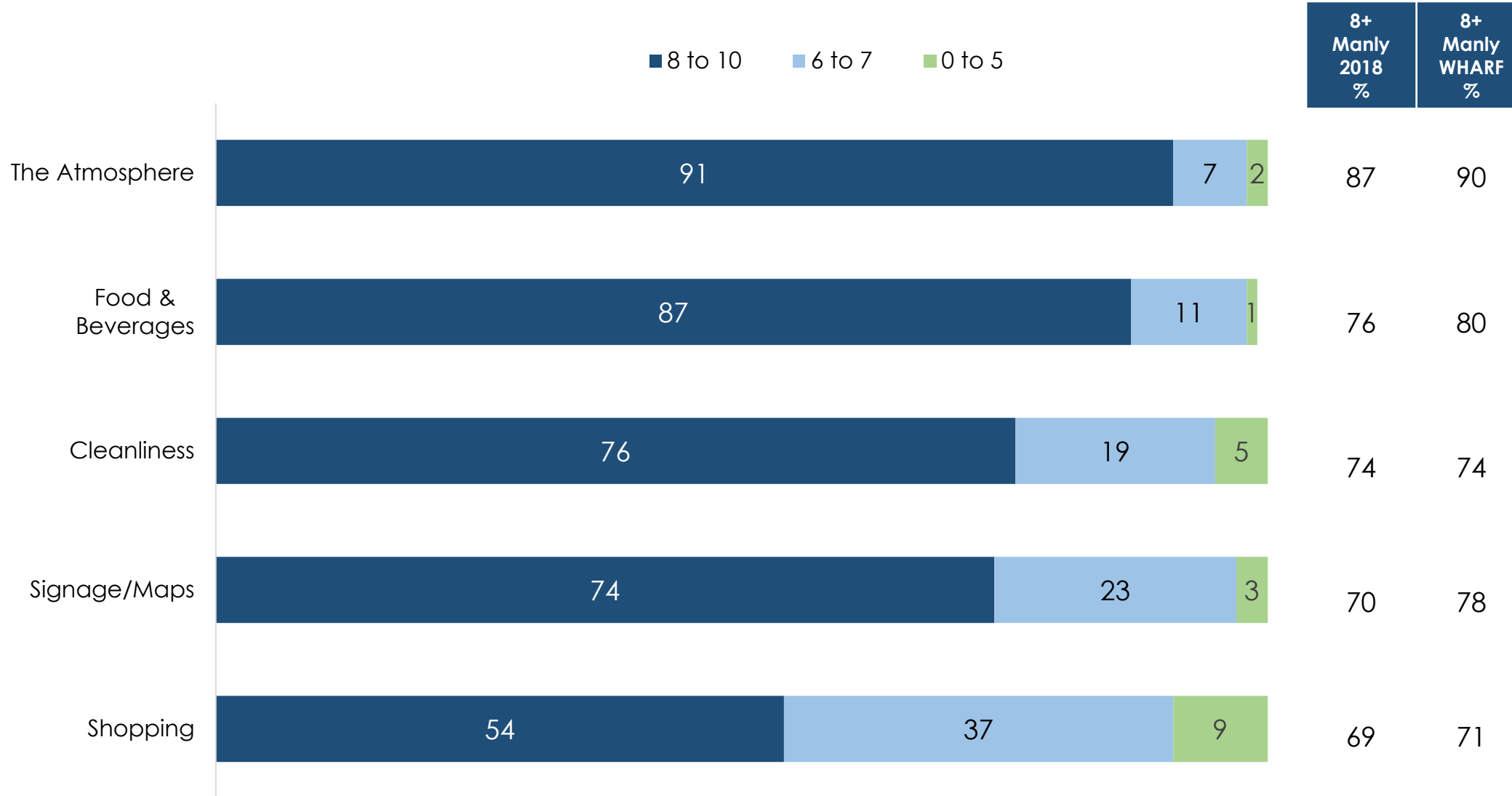
What would encourage a longer stay

	Manly 2018 (n=242) %	Manly MAIN 2019 (n=249) %	Manly WHARF 2019 (n=190) %
Its fine the way it is	33	13	32
Nothing	13	9	6
More food options/more cafes/restaurants	5	3	6
Better transport/cheaper transport	5	9	5
More activities/events/attractions	5	7	8
More parking	6	6	3
Cheaper parking	-	6	-
Better weather	1	3	2
More shade	5	2	2
BBQ area/picnic area/playground near the beach	1	2	1
Cheaper (NFD)	1	1	2
More/better toilets	1	1	1
Cheaper food and drink	1	3	-
Better shops/more diverse shops	1	1	1
More walks/access to the National Park	1	1	-
Cheaper accommodation	3	1	-
More markets/hold markets more often	2	-	-
Other	10	12	17
Don't know	11	29	28

Q8. What would encourage you, or other visitors like you, to stay longer or return to Manly/Palm Beach?

BASE: All Manly respondents (2018: n=242; 2019 Main Area: n=249; 2019 Wharf/Wst Esplanade n=190)

Satisfaction with various aspects of the visit



Satisfaction was high for all measured aspects.

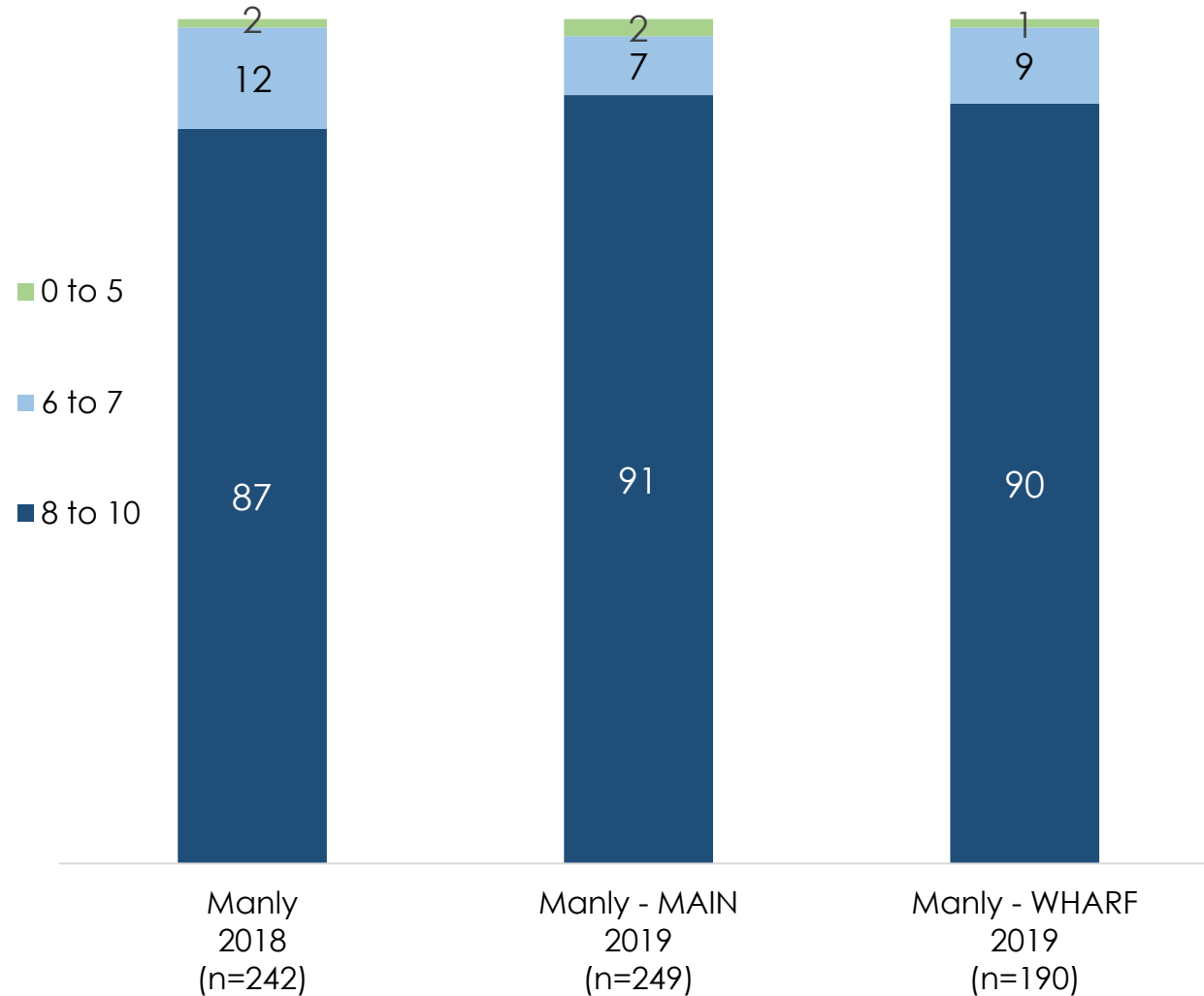
The highest satisfaction was expressed for the atmosphere of the location.

Q12. Now I would like you to think about your overall experience in Manly/Palm Beach, how would you rate each of the following on a scale of 0 to 10, where 0 is VERY POOR and 10 is VERY GOOD
Using any number from 1 to 10, what score would you give to indicate your satisfaction with?READ OUT. ROTATE.

BASE: All Manly respondents (2018: n=242; 2019 Main Area: n=249; 2019 Wharf/Wst Esplanade n=190)



Satisfaction with the atmosphere

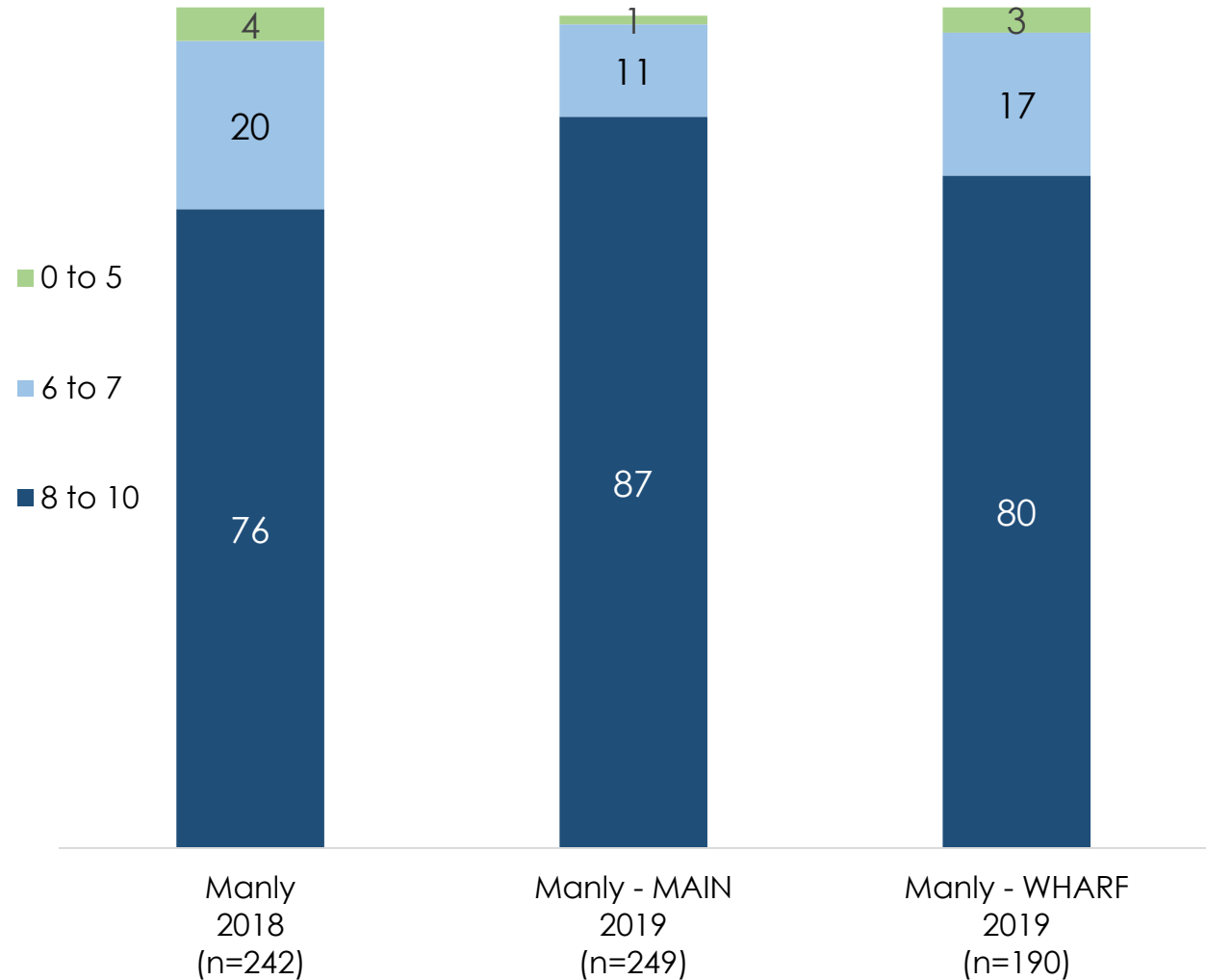


Those who responded with scores of 5 or less	Manly 2018 (n=4)* #	Manly MAIN 2019 (n=4)* #	Manly WHARF 2019 (n=)* #
Beautify the green spaces/maintain trees	-	n=1	-
Control overcrowding	-	n=1	-
More live music	n=1	-	-
Have more shaded rest areas	-	-	-
Pop up food stalls	n=1	-	n=1
Other	n=2	-	-
Not sure	n=1	n=2	n=1

10. Now I would like you to think about your overall experience in Manly/Palm Beach, how would you rate each of the following on a scale of 0 to 10, where 0 is VERY POOR and 10 is VERY GOOD
Using any number from 1 to 10, what score would you give to indicate your satisfaction with?READ OUT. ROTATE.
11. IF SCORED 5 OR LESS: How could it be improved?

* WARNING: Small base size

Satisfaction with food & beverages



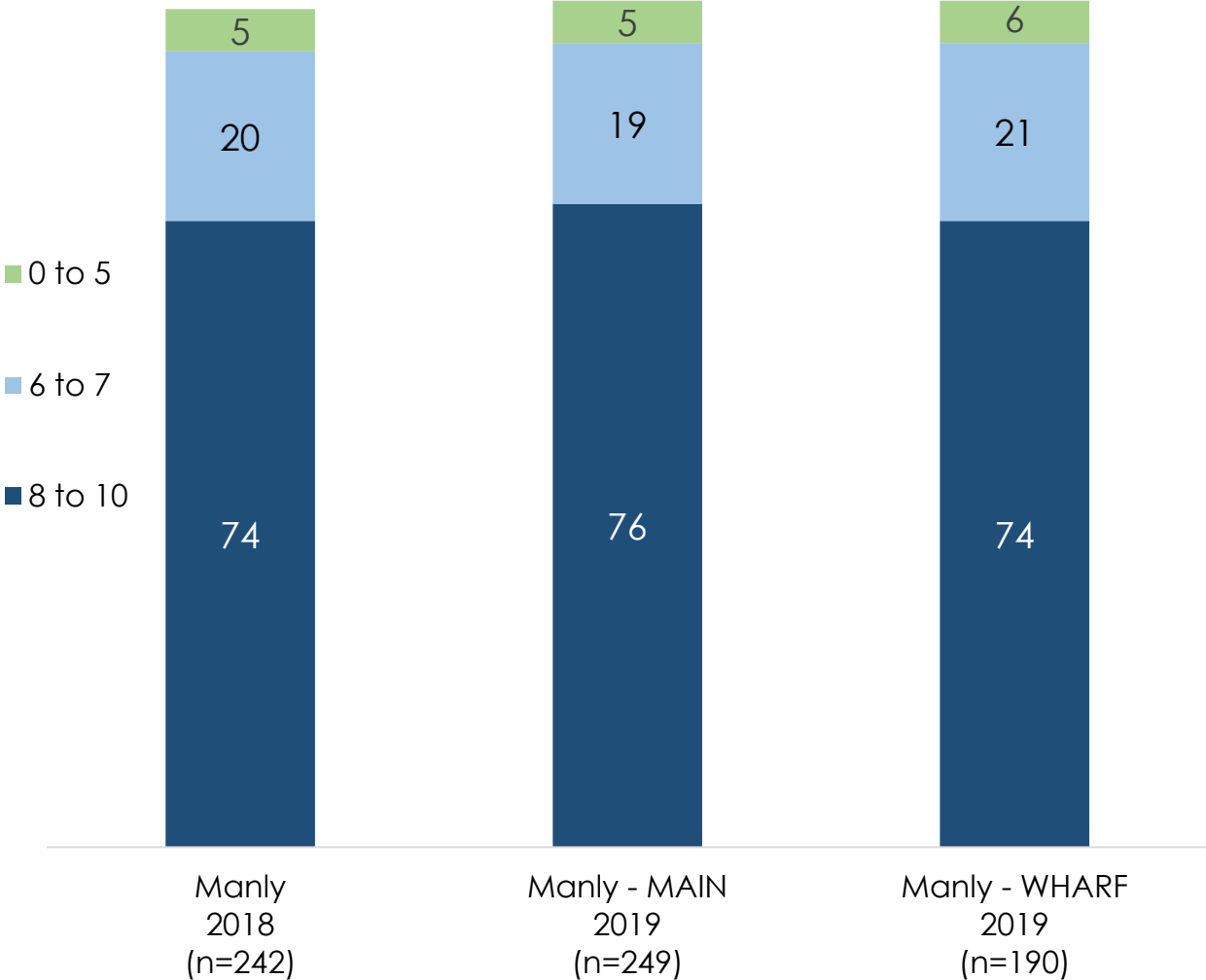
Those who responded with scores of 5 or less	Manly 2018 (n=9)* #	Manly MAIN 2019 (n=2)* #	Manly WHARF 2019 (n=5)* #
Food is too expensive/have cheaper options	n=3	n=2	n=2
Offer more options/greater diversity	n=2	-	n=2
More religious food options/Halal/Kosher	-	n=1	-
Offer better quality food/not just fries, hamburgers etc.	n=3	-	-
Other	n=2	-	-
Not sure	n=1	-	n=1

10. Now I would like you to think about your overall experience in Manly/Palm Beach, how would you rate each of the following on a scale of 0 to 10, where 0 is VERY POOR and 10 is VERY GOOD
Using any number from 1 to 10, what score would you give to indicate your satisfaction with?READ OUT. ROTATE.
11. IF SCORED 5 OR LESS: How could it be improved?

* WARNING: Small base size

BASE: All Manly respondents (2018: n=242; 2019 Main Area: n=249; 2019 Wharf/Wst Esplanade n=190)

Satisfaction with cleanliness



Those who responded with scores of 5 or less	Manly 2018 (n=13)* #	Manly MAIN 2019 (n=)* #	Manly WHARF 2019 (n=11)* #
Cleaning up the toilets & putting soap in the bathrooms	n=4	n=9	n=2
By picking up litter	n=5	n=2	n=4
Increase availability of bins	-	1=1	n=5
Other	n=4	n=2	-

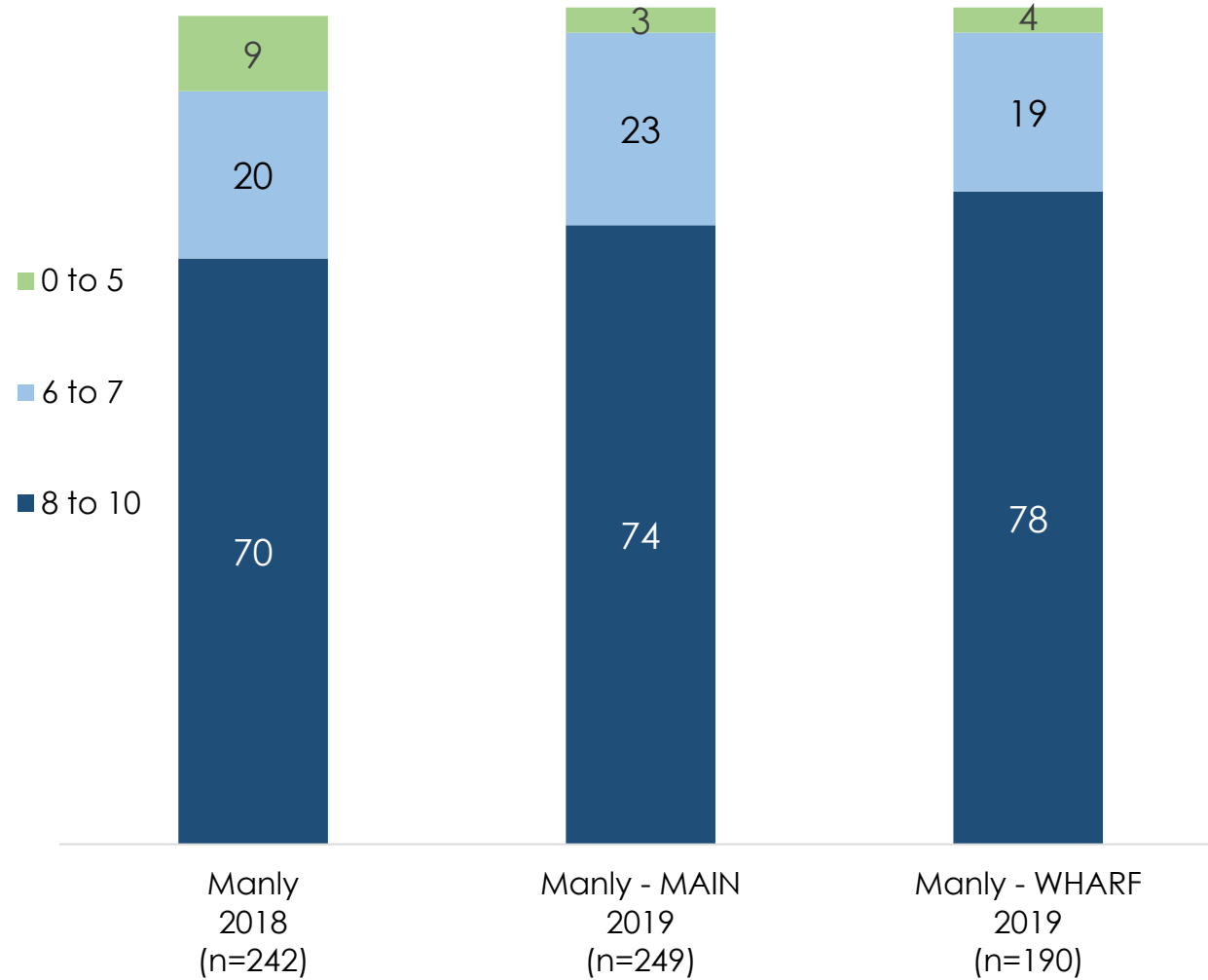
10. Now I would like you to think about your overall experience in Manly/Palm Beach, how would you rate each of the following on a scale of 0 to 10, where 0 is VERY POOR and 10 is VERY GOOD
Using any number from 1 to 10, what score would you give to indicate your satisfaction with?READ OUT. ROTATE.
11. IF SCORED 5 OR LESS: How could it be improved?

* WARNING: Small base size

BASE: All Manly respondents (2018: n=242; 2019 Main Area: n=249; 2019 Wharf/Wst Esplanade n=190)



Satisfaction with signage/maps



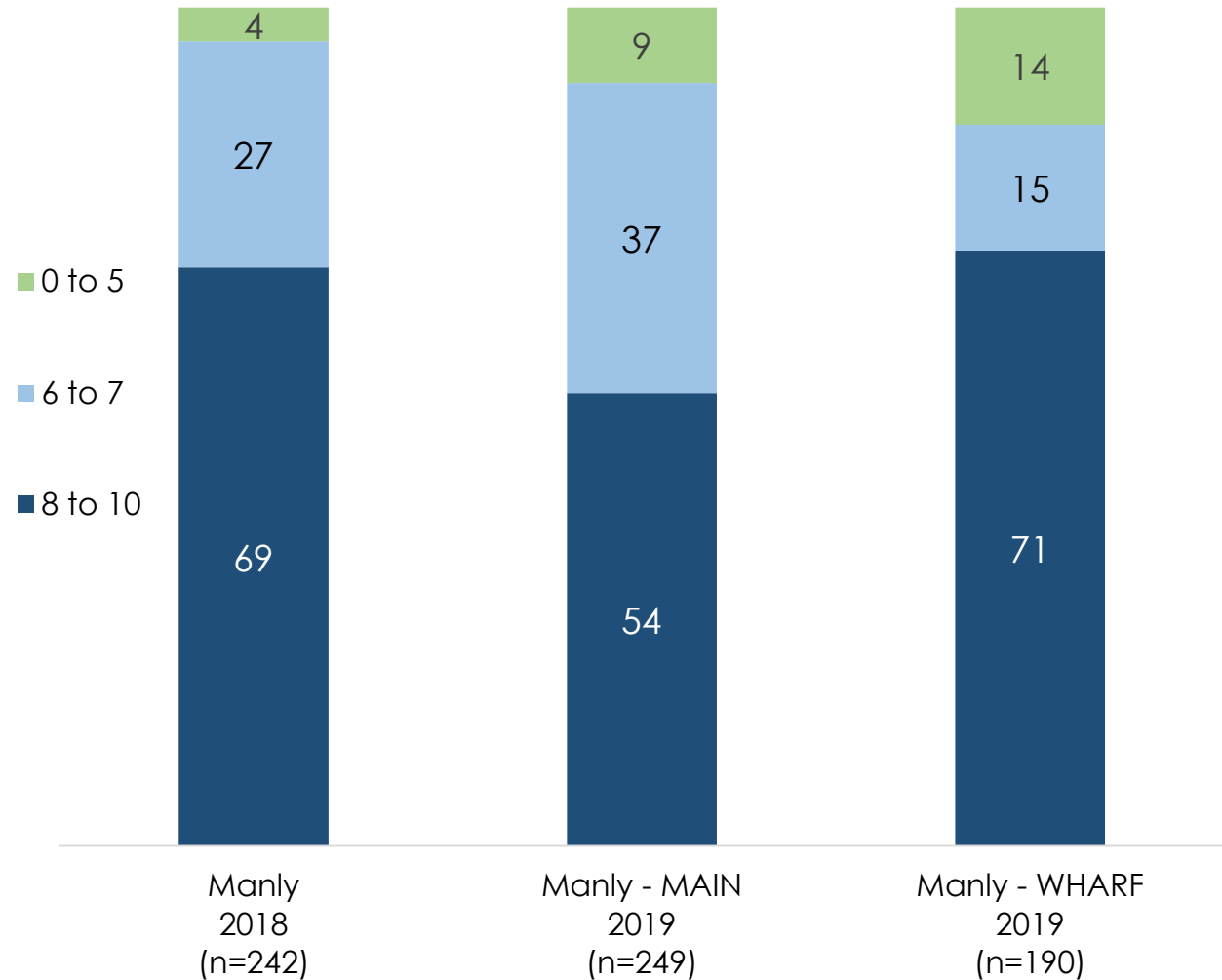
Those who responded with scores of 5 or less	Manly 2018 (n=17)* #	Manly MAIN 2019 (n=)* #	Manly WHARF 2019 (n=4)* #
Maps that highlight other attractions/walking trails/galleries etc.	-	n=1	n=2
Have an app	-	-	n=1
Have more signs/maps	n=9	n=1	-
Have bigger/more obvious signs	n=4	n=2	n=1
Put in signs indicating the way to the beach	n=1	-	-
Other	n=3	n=1	-
Not sure	1=1	-	-

10. Now I would like you to think about your overall experience in Manly/Palm Beach, how would you rate each of the following on a scale of 0 to 10, where 0 is VERY POOR and 10 is VERY GOOD
Using any number from 1 to 10, what score would you give to indicate your satisfaction with?READ OUT. ROTATE.
11. IF SCORED 5 OR LESS: How could it be improved?

* WARNING: Small base size

BASE: All Manly respondents (2018: n=242; 2019 Main Area: n=249; 2019 Wharf/Wst Esplanade n=190)

Satisfaction with shopping



Those who responded with scores of 5 or less	Manly 2018 (n=7)* #	Manly MAIN 2019 (n=16)* #	Manly WHARF 2019 (n=16)* #
Have a broader range of shops/greater diversity	n=2	n=7	n=6
Have more shops	n=1	n=5	n=4
Cheaper shops	n=2	n=1	n=3
Longer shopping hours	n=2	n=2	-
Other	n=2	-	n=1
Not sure	n=1	n=1	n=1

10. Now I would like you to think about your overall experience in Manly/Palm Beach, how would you rate each of the following on a scale of 0 to 10, where 0 is VERY POOR and 10 is VERY GOOD Using any number from 1 to 10, what score would you give to indicate your satisfaction with?READ OUT. ROTATE.

11. IF SCORED 5 OR LESS: How could it be improved?

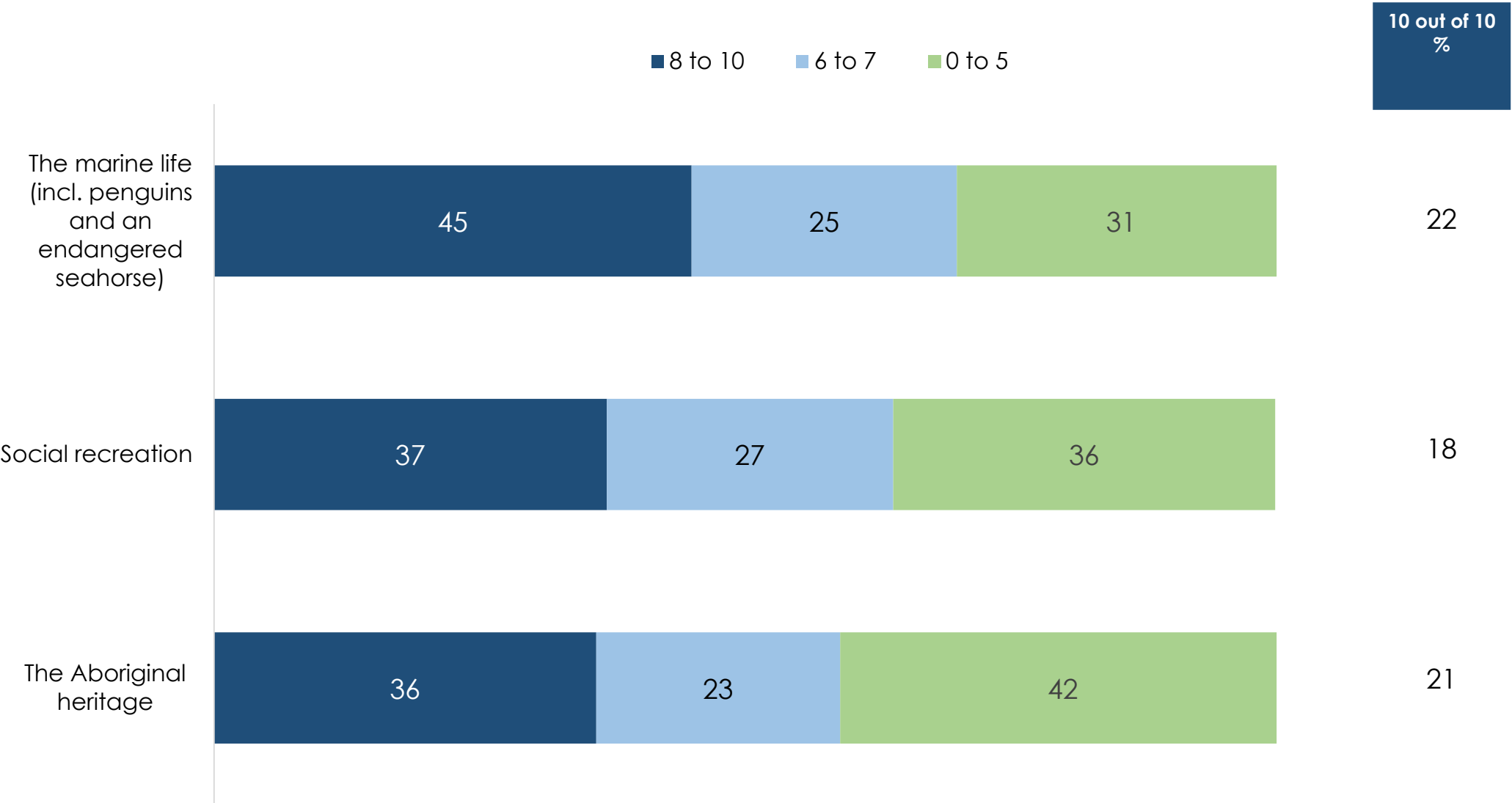
* WARNING: Small base size

BASE: All Manly respondents (2018: n=242; 2019 Main Area: n=249; 2019 Wharf/Wst Esplanade n=190)

Manly Wharf / West Esplanade Specific



Interest in various aspects of the area



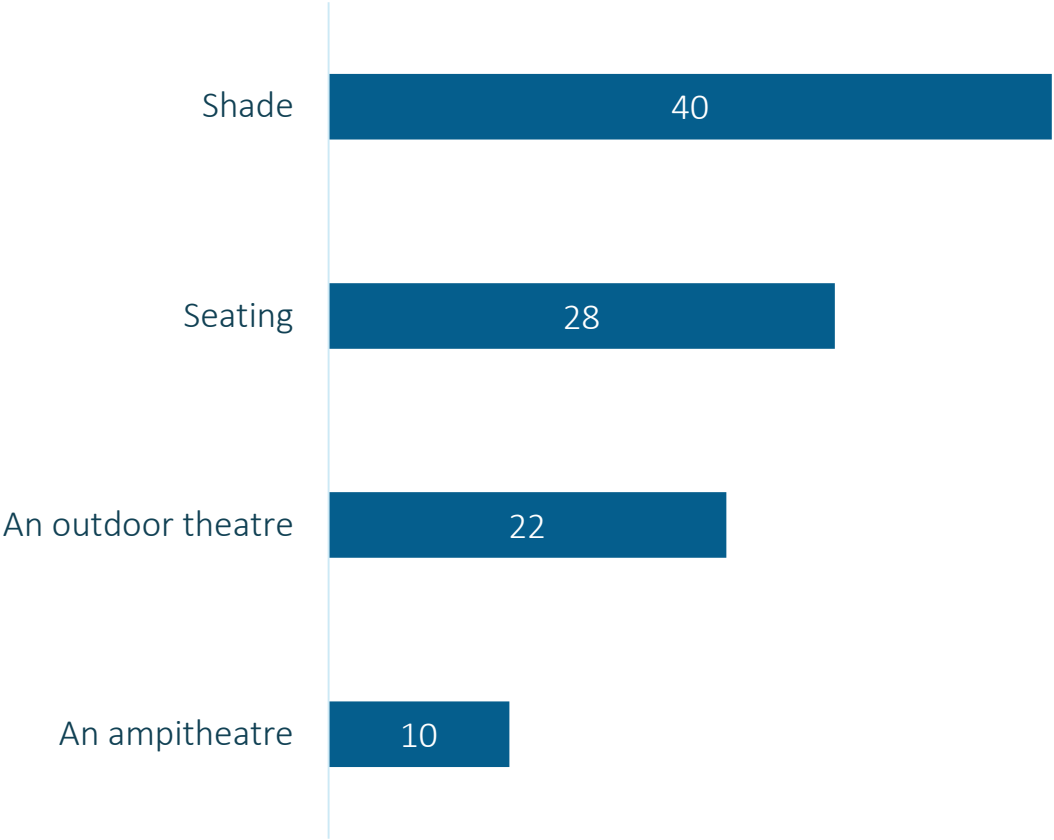
The highest level of interest was displayed in relation to the marine life.

14. On a scale from 0 to 10, where 0 means you are not at all interested, and 10 means you are extremely interested, how interested would you be in finding out more about each of the following aspects of this local area?

BASE: Manly Wharf/West Esplanade respondents (2019: n=190)

New Addition Preferences – index score

Note – Scores are calculated by converting a 1st place ranking to a score of 2, and 2nd place ranking to a score of 1.

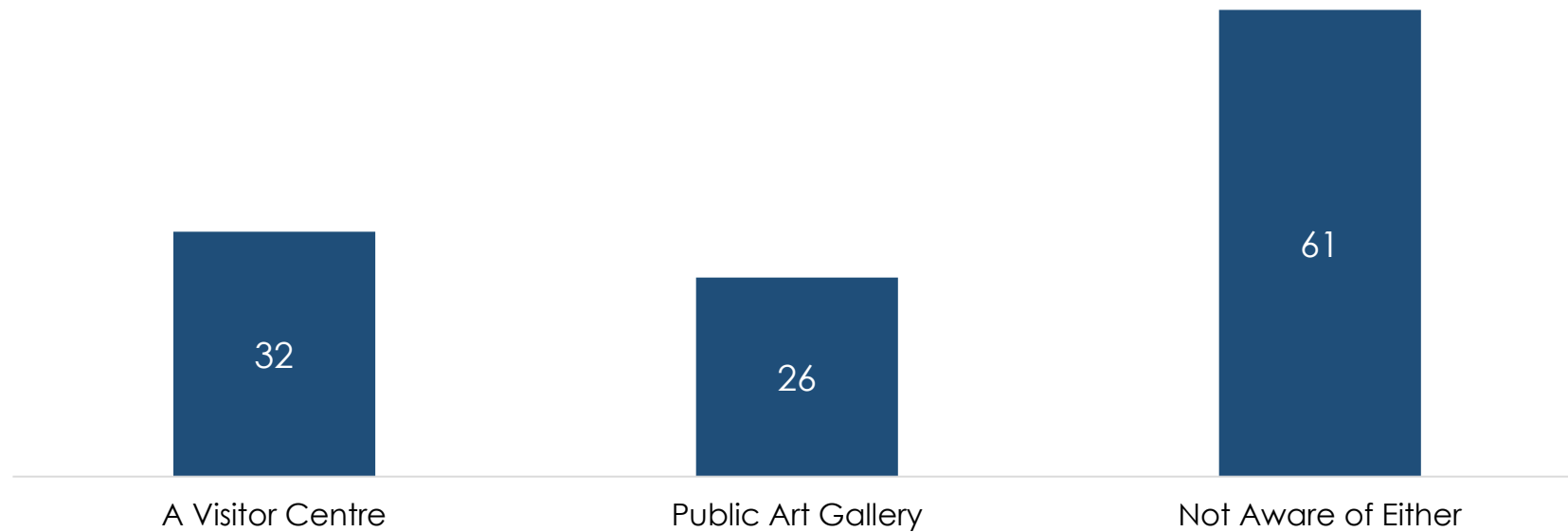


Taking both first and second preferences into account (in the Index Score generated), there was an overall preference for additional shade opportunities.

Q15. Please select up to two of the following potential additions to this area that you think would add value to this location? WRITE IN '1' FOR FIRST SELECTION, AND '2' FOR THE SECOND.

BASE: Manly Wharf/West Esplanade respondents (2019: n=190)

Awareness of facilities in the area



The majority of the Manly Wharf respondents were unaware of either the visitor centre or the public art gallery (61%).

16. Were you aware that the following facilities were located in this area?

BASE: Manly Wharf/West Esplanade respondents (2019: n=190)

Summary

Summary

Characteristic	Manly - MAIN	Manly - WHARF	Palm Beach
Visitor profile	<p>61% under 40 years old</p> <p>Most commonly attended with partner (43%)</p> <p>- 36% with friends, & 18% with children</p> <p>Many from overseas (45%), fewer Sydney (40%)</p>	<p>56% under 40 years old</p> <p>Most commonly attended with partner (37%)</p> <p>- 31% with friends, & 19% with children</p> <p>Many from overseas (49%), fewer Sydney (39%)</p>	<p>74% under 40 years old</p> <p>Most commonly attended with partner (51%)</p> <p>- 27% with friends, & 23% with children</p> <p>Most from Sydney (58%), fewer from overseas (34%)</p>
Information sources	<p>Likely to have visited previously (59%)</p> <p>- word-of-mouth also prominent (34%)</p>	<p>Most likely to have visited previously (49%)</p> <p>- Reasonably high reliance on word-of-mouth (45%)</p>	<p>High reliance on word-of-mouth (48%)</p> <p>- Previous experience also important (26%)</p> <p>- Home & Away a secondary source (9%)</p>
Specific attractions sought	<p>The beach was the clear main attraction (88%)</p> <p>- Visiting friends & family also featured to some degree (14%)</p>	<p>The beach was the main attraction (64%)</p> <p>- Visiting friends & family also important (21%)</p>	<p>The beach was the single main attraction (92%)</p>

Summary

Characteristic	Manly - MAIN	Manly - WHARF	Palm Beach
Activities undertaken	A beach visit was extremely common (88%) - Most were also eating at a restaurant or café (53%) - Around a third were also going for a walk or ride (32%)	The majority visited the beach (66%) - Most were also eating at a restaurant or café (53%) - Just under a third were also going for a walk or ride (31%)	A beach visit was extremely common (88%) - General sightseeing was the next most popular activity (56%) - Almost half were also eating at a restaurant or café (49%)
Length of stay	Most commonly from 2-4 hours (44%) - Only 10% for a day or more	Over a third from 2-4 hours (36%) - 20% for a day or more	Most commonly from 2-4 hours (48%) - 12% for a day or more
Spend level	Most common spend level was \$20-\$50 (39%) - Average spend level was \$50	Most common spend level was \$20-\$50 (39%) - Average spend level was \$63	Most common spend level was under \$20 (46%) - Average spend level was \$29
NPS	An extremely high NPS resulted (72) - NPS was higher amongst female respondents (77)	A high NPS resulted (60) - NPS was higher amongst female respondents (63)	A good NPS resulted (43) - NPS was higher amongst female respondents (48)
Satisfaction	Satisfaction was extremely high for 'atmosphere' (91% 8+) and 'food & beverages' (87% 8+)	Satisfaction was extremely high for 'atmosphere' (90% 8+) and 'food & beverages' (80% 8+)	Satisfaction was extremely high for 'atmosphere' (90% 8+) and 'cleanliness' (90% 8+). - Lower satisfaction with shopping (33% 8+)

Appendix: Questionnaire

Northern Beaches Visitor Survey
SB07-F



Date: __/__/2019

Start Time: ____:____ am/pm

Survey Introduction

Good morning/afternoon/evening. I am conducting a very short survey on behalf of Northern Beaches Council to help them plan for visitor needs, and to understand how visitors contribute to the local economy. Can I have a few minutes of your time to ask some questions about your visit?

Please be assured that all responses will remain totally confidential and anonymous.

Screener

- Can I just confirm that you are a visitor to the area (i.e. you are not a permanent resident of the Northern Beaches).
NOT a local 1 GO TO Q3
Permanent resident of the Northern Beaches 2 CONTINUE
- Just one quick question for you - Do you think tourism positively contributes to the local area?
Yes 1 THANK & TERMINATE
No 2 THANK & TERMINATE

Question Set

- How did you find out about this area? DO NOT PROMPT. MULTIPLE RESPONSE.
Word of mouth (in person) 1 Internet/website (SPECIFY) _____
Previous visit/experience 2 _____ 6
Through social media 3 Newspaper (SPECIFY) _____ 7
A description in a travel guide 4 Other (SPECIFY) _____
Part of a set tour 5 _____ 8
- And how did you get here today? DO NOT PROMPT. MULTIPLE RESPONSE.
Ferry 1 Car 3 Other (SPECIFY) _____
Bus 2 Bicycle 4 _____ 5
- And what specifically attracted you to the area? Why did you want to visit here? DO NOT PROMPT. MULTIPLE RESPONSE.
The beach 1 Business purposes 3
Visiting friends and family 2 The ferry ride 4
Other specific attraction(s) (SPECIFY) _____ 5
- In total, how long do you anticipate that you will spend in this area?
LESS THAN A DAY A DAY OR MORE (incl. overnight)
Under two HOURS 1 One to two DAYS 5
Two to four HOURS 2 Three to four DAYS 6
Five to seven HOURS 3 Five to seven DAYS 7
Eight or more HOURS 4 More than a WEEK 8
- IF AN OVERNIGHT STAY INVOLVED (FROM Q6: What style of accommodation are you using? Is it.....READ OUT.
Hotel 1 Private letting (e.g. AIRBNB) 4
Motel/backpackers 2 With friend/relative (unpaid) 5
Bed & Breakfast 3 Campground 6

1

- What would encourage you, or other visitors like you, to stay longer or return to Manly/Palm Beach?

- How likely would you be to recommend Manly/Palm Beach to family and friends as a place to visit using a scale of 0 to 10, where 0 is not at all likely to recommend and 10 is extremely likely to recommend?

Likelihood of recommending 0 1 2 3 4 5 6 7 8 9 10

- What have you already done, and do you plan to do while here? READ OUT. MULTIPLE RESPONSE.

Eat at restaurant or café	1	Sightseeing	5
Eat from a take-away outlet	2	Shopping	6
A drink at a bar or pub	3	Visit friends or relatives	7
Visit the beach	4	Go for a walk or bicycle ride	8
Anything else (SPECIFY) _____			9

- Are you planning on visiting any other places on the Northern Beaches during your visit today?

No 1 Yes 2 (SPECIFY) _____

- Now I would like you to think about your overall experience in Manly/Palm Beach, how would you rate each of the following on a scale of 0 to 10, where 0 is VERY POOR and 10 is VERY GOOD Using any number from 1 to 10, what score would you give to indicate your satisfaction with?READ OUT. ROTATE.

	Very Poor										Very good										N.A.
i. Cleanliness	0	1	2	3	4	5	6	7	8	9	10	99									
ii. Signage/Maps	0	1	2	3	4	5	6	7	8	9	10	99									
iii. The Atmosphere	0	1	2	3	4	5	6	7	8	9	10	99									
iv. Shopping	0	1	2	3	4	5	6	7	8	9	10	99									
v. Food & Beverages	0	1	2	3	4	5	6	7	8	9	10	99									

- IF SCORED 5 or LESS FOR ANY AT Q12, ASK: How could it be improved? RECORD ASPECT NUMBER.

- Approximately much money (PER PERSON) have you spent, or do you plan to spend on your visit here today?

Under \$20	1	\$101 to \$150	4	\$351 to \$500	7
\$20 to \$50	2	\$151 to \$200	5	More than \$500	8
\$51 to \$100	3	\$201 to \$350	6	Refused (DO NOT OFFER)	9

Manly West Esplanade and Manly Wharf ONLY

- On a scale from 0 to 10, where 0 means you are not at all interested, and 10 means you are extremely interested, how interested would you be in finding out more about each of the following aspects of this local area?

	Not at all										Extremely										
i. The Aboriginal heritage	0	1	2	3	4	5	6	7	8	9	10										
ii. The marine life (incl. penguins and an endangered seahorse)	0	1	2	3	4	5	6	7	8	9	10										
iii. Social recreation	0	1	2	3	4	5	6	7	8	9	10										

2

- Please select up to two of the following potential additions to this area that you think would add value to this location? WRITE IN '1' FOR FIRST SELECTION, AND '2' FOR THE SECOND.

Shade	_____	An outdoor theatre	_____
Seating	_____	An amphitheatre	_____

- Were you aware that the following facilities were located in this area? READ OUT. MULTIPLE RESPONSE.

A visitor centre	1	Not aware of either	3
Public art gallery	2		

Demographics

- RECORD GENDER Male 1 Female 2
- Who are you attending this area with? READ OUT. MULTIPLE RESPONSE.
Self only 1 Children 3 Work colleagues 5
Partner 2 Friends 4 Other _____ 6
- Which of the following age ranges do you fit into? READ OUT
15 to 19 years 1 40 to 49 years 4 70 to 79 years 7
20 to 29 years 2 50 to 59 years 5 80 or older 8
30 to 39 years 3 60 to 69 years 6 REFUSED (DO NOT OFFER) 9
- Can you please tell me your postcode: _____
OR IF FROM OVERSEAS: Please tell me your country: _____
- IF FROM OVERSEAS OR INTERSTATE: Was your visit to Manly/Palm Beach planned before you arrived in Sydney?
Yes 1 No 2

Finish

Thank you very much for your time. ☺

Finish Time: ____:____ pm

Interviewer: _____

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Woolcott Research & Engagement

L6, 104 Mount Street

North Sydney 2060

 +61 29261 5221

 www.woolcott.com.au

Northern Beaches Council
Manly & Palm Beach Visitor Survey
Job # 9807-F
Contact: David Walker

