AGENDA

ECONOMIC & SMART COMMUNITIES STRATEGIC REFERENCE GROUP

Notice is hereby given that a meeting of the Economic & Smart Communities Strategic Reference Group will be held in the Council Chambers, Manly on

WEDNESDAY 11 APRIL 2018

Beginning at 6:00pm for the purpose of considering matters included in this agenda.

Committee Members

Cr David Walton (Chair)	
Mayor Michael Regan	
Cr Sue Heins	
Cr Roslyn Harrison	
Saul Carroll	Small local business
Andy West	
Paul Billingham	
Stuart White	Microsoft Australia
Drew Johnson	Manly Business Chamber
Peter Middleton	Newport Residents Association
Ngaire Young	Northern Beaches Campus, TAFE NSW
Lauren Hosking	
Geri Moorman	
Gordon Lang	
Alan McNamara	
Alexander Coxon	

Council Officer Contacts

Kath McKenzie	Executive Manager, Community Engagement & Communications
Nathan Rogers	Chief Information Officer
Lynne Jess	Governance Officer

Quorum
A majority of members including the Chair or one of the elected Councillors.

Agenda for Economic & Smart Communities Strategic Reference Group Meeting to be held on Wednesday 11 April 2018 in the Council Chambers, Manly Commencing at 6:00pm

Nil

NEXT MEETING Wednesday 20 June 2018

1.0 APOLOGIES

Apologies must be received and accepted from absent Members and leave of absence from the Economic & Smart Communities Strategic Reference Group meetings must be granted.

2.0 DECLARATION OF PECUNIARY AND CONFLICTS OF INTEREST

Reference Group Members are advised of the following definitions of a "pecuniary" or "conflict" of interest for their assistance:

*Section 442 of the Local Government Act, 1993 states that a "pecuniary" interest is as follows:

> *"(1) [Pecuniary interest] A Pecuniary interest is an interest that a person has in a matter because of a reasonable likelihood or expectation of appreciable financial gain or loss to the person or another person with whom the person is associated.*
>
> *(2) [Remoteness] A person does not have a pecuniary interest in a matter if the interest is so remote or insignificant that it could not reasonably be regarded as likely to influence any decision the person might make in relation to the matter."*

Members should reference the Local Government Act, 1993 for detailed provisions relating to pecuniary interests.

*Council's Code of Conduct states that a "conflict of interest" exists when you could be influenced, or a reasonable person would perceive that you could be influenced by a personal interest when carrying out your public duty.

3.0 CONFIRMATION OF MINUTES OF PREVIOUS MEETING

4.0 AGENDA ITEMS

ITEM 4.1	**SMART NORTHERN BEACHES PROJECT**
REPORTING OFFICER	**CHIEF INFORMATION OFFICER**
TRIM FILE REF	**2018/198881**
ATTACHMENTS	**1 ⇩Memo to SRG - Smart Northern Beaches Project**

Memo

Smart Northern Beaches Project

To:	Economic & Smart Communities Strategic Reference Group
From:	Claire Chaikin-Bryan, Project Manager (Transformation)
Date:	27 March 2018
Subject:	Smart Northern Beaches Project Overview
Record number:	2018/204929

The following provides an overview of the Smart Northern Beaches project to the Economic and Smart Communities Strategic Reference Group.

Project Objective

Establish a Strategy, Policy and Action Plan that enables Council to have a consistent, integrated and endorsed approach to the identification, selection and implementation of Smart Community related projects in order to optimise future opportunities for pilots, projects, partnerships and grant funding.

Project Deliverables

The Smart Northern Beaches Project will deliver a:

- Smart Community Strategy 2018-2025 ('Smart Northern Beaches 2025')
  - Provides a vision, guiding principles and smart community initiatives
- Policy for Smart Community Projects, Pilots and Partnerships
  - Supports delivery of the Strategy by providing a procurement framework for how projects, pilots and partnerships can be entered into
- Action Plan for 2018-2019

Current completion timing for deliverables is:

- Draft Strategy, Policy and Action Plan - August 2018 Council Meeting
- Final Strategy, Policy and Action Plan - October 2018 Council Meeting

What is a Smart Community?

A Smart Community is liveable, workable and sustainable. Technology, including the collection and analysis of data, is a key enabler to becoming a Smart Community.

- Liveable: ensuring clean, healthy living conditions without pollution and congestion and digital infrastructure that makes services instantly and conveniently available anytime, anywhere.
- Workable: providing enabling infrastructure — energy, connectivity, computing, essential services — to compete globally for high-quality jobs.
- Sustainable: providing services without stealing from future generations.

Why become a Smart Community?

Becoming a smart community will ensure that the Northern Beaches will be prosperous and resilient for the future, while tackling the challenges of today.

Why is this a Council Issue?

Technological advances are transforming how we live, work and play, bringing challenges both locally and globally. Council has an obligation to play a bigger strategic role beyond roads, rates and rubbish. To advocate for our community, to lead by example and to support our community through the challenges of the future, ensuring that the Northern Beaches remains resilient.

Project Benefits

- Helps us achieve CSP Goals through innovative solutions
- Supports the Northern Beaches Community to be best prepared for the future
- Provides a consistent integrated approach for related projects and pilots (identification, selection, procurement and implementation)
- Provides a potential avenue for increased revenue
- Establishes Northern Beaches Council as a leading organisation in Smart Community practice
- Provides an avenue for partnership and funding opportunities with Universities, State and Federal Government (See Smart Cities and Suburbs Program below)

Federal Government Smart Cities and Suburbs Program

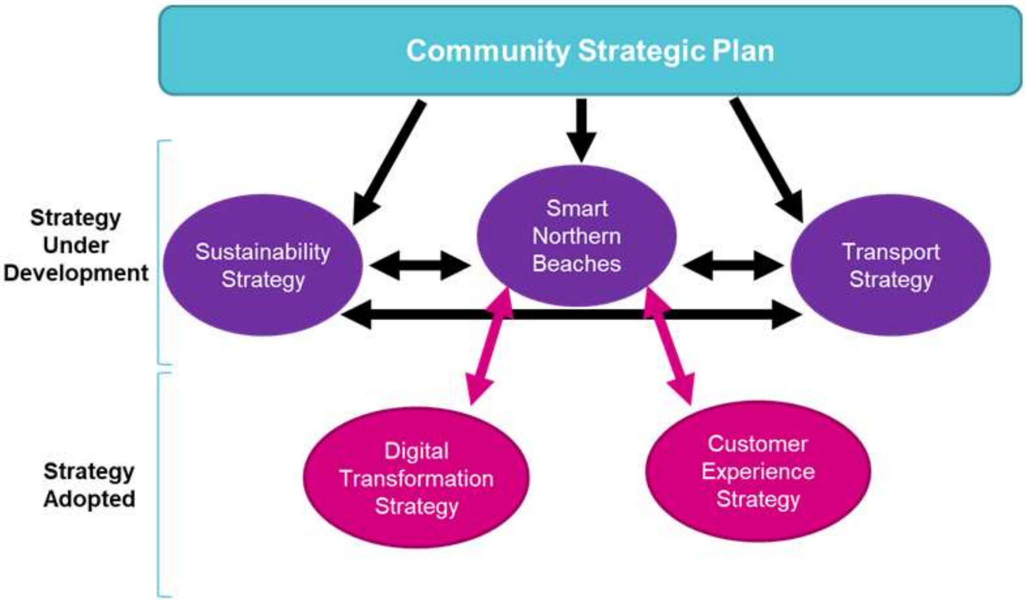
"*The $50 million Smart Cities and Suburbs Program is supporting the delivery of innovative smart city projects that improve the liveability, productivity and sustainability of cities and towns across Australia.*

On 17 November 2017, the Assistant Minister for Cities and Digital Transformation, the Hon. Angus Taylor MP, announced the outcomes of Round 1. Forty nine projects will benefit from a total of $27.7 million in Australian Government funding, across all states and territories.

Round 1 was highly competitive, with 176 applications received. Successful projects are being co-funded by partners including local governments, industry, research organisations and the private sector. This significant investment equates to almost $38 million, or around $1.40 for every Australian Government dollar.

A second funding round is expected to open for applications in the first half of 2018."
(Department of Infrastructure, Regional Development and Cities)

Connection to Other Council Strategies



Connection to Specific Draft Community Strategic Plan Goals

Goal 4 - Our Council is recognised as a community leader in environmental sustainability

Goal 5 - Our built environment is developed in line with best practice sustainability principles

Goal 6 - Our community will continue to work towards sustainable use of resources

Goal 13 - Our businesses are well-connected and thrive in an environment that supports innovation and economic growth

Goal 14 - Our economy provides opportunities that match the skills and needs of the population

Goal 15 - Our economy provides a range of employment and education opportunities to match the skills and needs of the population

Goal 16 - Our integrated transport networks meet the needs of our community

Goal 17 - Our community can safely and efficiently travel within and beyond Northern Beaches

Goal 18 - Our community can easily connect and communicate through reliable communication technologies

Goal 22 - Our Council builds and maintains strong partnerships and advocates effectively on behalf of the community

Strategy Structure

The structure of the Strategy is based on the BSI Standard PAS 181: Smart city framework – Guide to establishing strategies for smart cities and communities. The Strategy will contain:

- Vision
- Guiding Principles (targeting 4)
- Grouped Topic Areas – these will cover how to deliver the guiding principles in practice and metrics to measure achievement and benefits realisation

Potential Strategy Topic Areas

The Strategy and the Pilots and Projects coming from it will touch a number of areas in Council. This is a list of potential topic areas covered by the Strategy:

- Co-working and Innovation Hubs
- Entrepreneurship/Start-Ups
- Digital Economy
- STEM Education and Digital Literacy
- Smart Planning and Urban Development
- Smart Buildings
- Smart Infrastructure
- Smart Poles/Lighting
- Smart Parking
- Autonomous Vehicles and Electric Vehicles
- Smart Waste
- Clean Energy Generation
- Internet of Things (IoT)
- Digital Transformation and Innovation
- Digital Democracy

Upcoming Strategic Reference Group Engagement

A kick-off engagement workshop will be run with the Economic and Smart Communities Strategic Reference Group at the 11 April 2018 meeting.

Recommendation

That the Economic and Smart Communities Strategic Reference Group note this memo.

C. Chaikin-Bryan

Claire Chaikin-Bryan
Project Manager (Transformation)

ITEM 4.2	**TOURISM - VISITOR SURVEY RESULTS**
REPORTING OFFICER	**ECONOMIC DEVELOPMENT COORDINATOR**
TRIM FILE REF	**2018/198931**
ATTACHMENTS	**1 ⇩Key Findings 2018 Palm Beach and Manly Visitor Survey**
	2 ⇩SHOROC Visitor Economy Opportunities Paper

Northern Beaches Visitor Survey January 2018

Key Findings

northern beaches council

Update: Visitor Survey Results – Who they were

- 413 face-to-face intercept interviews Manly (242)and Palm Beach (171)
- Young age profile (53%) under 40 years
- Most attended with partner (46%), friends (26%) or children (19%)
- Manly: Overseas (45% highest from UK), less from Sydney (29%)
- Palm Beach: Majority from Sydney (68%) and less from overseas (18%)
- Overnight visitors in Manly and Palm Beach
    - 37% stayed private letting
    - 25% with friends/family
    - 22% motel/backpackers
    - 10% hotel
    - 6% camping

Visitor Feedback – What attracted them

- Information sources about the area:
  - High reliance word-of-mouth (50% both locations)
  - Returning visitors higher for Manly (45% compared to 33% for Palm Beach)
  - Low internet/website usage 1% for Manly and 6% for Palm Beach
- 59% said visit was ‘pre-planned’
  - Esp. Interstate and Overseas
  - Fewer pre-planned trips to Palm Beach than Manly
- Beaches key draw card for visiting
  - 71% for Manly and 64% for Palm Beach
- Other attractors:
  - Ferry ride (Manly)
  - Light house and Home and Away (Palm Beach)

Visitor Feedback: What they Experienced

- 88% were day-trippers
  - 16% stayed more than 1 day (Manly)
  - 7% stayed more than 1 day (Palm Beach)
  - 2-4 hours the most common length of stay for both locations
- Visit the beach key activity (88%)
  - walk/bike ride; eating; shopping; and drinking (Manly)
  - sight seeing; markets; and picnics (Palm Beach)
- Almost one in five planned to visit elsewhere in Northern Beaches that day
- Average daily spend per person $54
  - $70 (Manly)
  - $32 (Palm Beach)

Visitor Feedback: What they thought

- Majority of visitors to both Manly and Palm Bach would recommend to other visitors
  - Female and domestic visitors more likely to highly recommend
- To encourage visitors to stay longer over 40% said it was fine the way it is or nothing.
  - For Manly more parking, better transport and more food options were cited
  - For Palm Beach cheaper parking, more food options were cited
- Satisfaction overall high
  - 88% rating 8 or above out of 10 for Atmosphere
  - 77% rating 8 or above for Cleanliness (only 4% rate under 5, citing litter and cleanliness of toilets as areas for improvement)
  - Manly score significantly higher than Palm Beach visitors for food and beverage shopping options

SHOROC
Visitor Economy Opportunities Paper

SHOROC

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1. EXECUTIVE SUMMARY

The Stafford Group (The Group) was commissioned to develop a Visitor Economy Opportunities Paper for SHOROC. This opportunities paper was requested to provide guidance on the potential for expanding the visitor economy in the Northern Beaches region and to also highlight any challenges.

As an Opportunities Paper, it is provided at a top line level only so it is important that readers understand this is not a comprehensive strategy or plan. Rather, this work should lead to the development of such a strategy or plan for the Northern Beaches.

It is clearly evident that the visitor economy is an important component of the broader economy[1] of the Northern Beaches with visitor spend actively supporting a number of local businesses and events. In spite of this, there is concern expressed by a number of stakeholders and through the literature reviewed, that the communities lifestyle in the Northern Beaches is sacrosanct and needs to be protected and preserved. Growth in the visitor economy is not necessarily viewed positively where it is thought to generate conflict with locals over access to parking, use of recreational facilities and increased traffic congestion especially.

1.1. Key Findings

The following reflect the key findings identified.

- The Northern Beaches is generally recognised as offering the quintessential beachside Australian lifestyle experience surrounded by a variety of high quality national parks and often Council controlled or managed reserve lands.
- Numerous quality walking trails, cycle trails and water-based experiences have been introduced in different parts of the Northern Beaches to support greater understanding of the natural environment and to encourage stronger recreational use.
- The focus to date has been heavily on outdoor based infrastructure and related experiences, particularly recognising the strength of the National Parks and harbour foreshore areas which abound in the region.
- Access into the Northern Beaches is often very challenging by road due to traffic congestion and, in particular, delays associated with the Spit Bridge.
- The Councils actively support a number of events within the region with challenges including the sustainability of some of the major events and getting attendees into and out of event locations because of transport limitations.
- The traditional tourism hub for the region is Manly which is also seen as one of the major icons of greater Sydney for the inbound visitor markets.

[1] Tourism and the visitor economy is estimated to represent approximately 10% of regional employment and 9.6% of total value added output for the regional economy which are higher percentages than the NSW State average.

- Whilst many stakeholders are keen to see growth in the visitor economy, the stronger interest appears to focus around growing visitor yield rather than growing visitor numbers. The product needs to be developed, however, to adequately achieve this.
- Whilst Mosman is noted as part of the SHOROC region, most stakeholders commented the perceived gateway into the Northern Beaches was Manly though Mosman is seen to have a number of important visitor attractions (Taronga Zoo, shopping precincts and coastal walkways) which are noted as offering considerable value.

1.2. Primary Challenges for Visitor Economy Growth

The following are noted as the primary challenges from the literature review and the stakeholder consultation undertaken. These are not provided in priority order and are supplemented with a number of other challenges as identified later in this report.

- Traffic congestion and road access into the Northern Beaches is seen to be problematic, particularly during peak periods and for events.
- The region is not perceived as an integrated region but rather a grouping of Council areas. Whilst there is complementary product across the region, this often appeals to different markets which require alternative marketing strategies.
- There is a low level of destination awareness other than the lifestyle beach experience which the Northern Beaches are synonymous with and as mostly attractive residential enclaves.
- Whilst there has been a number of infrastructure developments (walkways, cycle-ways and experiences particularly in and around national parks and reserve areas), there is relatively little commercial development to generate financial returns from the use of this infrastructure by visitors and a heavy focus on recreational facilities rather than low impact and sustainable commercial nodes.
- The region lacks sufficient commercial short-term accommodation facilities and is nervous about where development of this should be located with an evident nimby concern prevalent.
- Car parking, particularly at beach locations is seen to be highly problematic due to the lack of sufficient car parking or the way that parking systems are managed.
- There is currently a lack of robust visitor data (numbers, spend, trends etc.) to provide an evidence base to help grow support for improving the visitor economy and gaining greater support from Councils and community. The DNSW State Government visitation estimates are also disputed by many stakeholders.

1.3. Opportunities

Many of the challenges noted above can be found in other parts of Sydney as well as other major cities globally. Importantly, there are solutions to these challenges if there is the political will and community support to grow the visitor economy on a sustainable basis. The key opportunities are seen as follows.

- The introduction of smaller to medium size boutique accommodation focussed on potentially growing a higher spending leisure market along with a small scale meeting/conference market.
- Introduction of a high quality conference facility which can support a number of local tours and related product.
- Utilising a number of the surf clubs for seasonal food and beverage operations to support local community needs as well as visitor markets.
- Introduction of pop-up cafes and retail facilities on a seasonal basis to help support and grow the commercial opportunities associated with the various walkways and cycle-ways which have been developed.
- Developing more water-based transport opportunities which can also offer heritage, history and indigenous interpretation based tours following the coast line and sites of significance.
- Developing night time based and appropriately scaled family friendly events and activities to support the local community as well as a wider Sydney visitor market who are keen for evening experiences.
- Addressing the highly seasonal nature of the visitor economy by actively encourage promotional initiatives which support stronger visitation in low and shoulder season periods and which package product to achieve this.
- Identifying training and upskilling initiatives to support the bulk of tourism and related businesses throughout the Northern Beaches which are characterised as micro or small businesses.
- Growing the calm water boating and kayaking experiences (including charter vessels) particularly around Pittwater/Ku-ring-gai Chase National Park.
- Assessing and developing an integrated visitor services strategy across the Northern Beaches through an integrated regional website, the supply of information to locals and other visitor markets online and the introduction of initiatives such as popup visitor information booths during peak periods at high visitation locations and at major events.
- Assessment of improved employment opportunities (full-time, part-time and casual) also linked to the large student market studying in the Northern Beaches and noting the tourism employment challenges which already exist and which need to be adequately filled.
- Developing a tourism strategy or destination management plan for the Northern Beaches which supports an integrated approach for growing the desired visitor markets and potentially focussed on promoting visitor yield rather than greater numbers through the creation of new and improved product options.
- The potential creation of activity centred round specific visitor precincts, nodes and hubs in key locations throughout the Northern Beaches which can potentially aim to consolidate visitor spend and activity and actively avoid conflict with the lifestyle requirements of local communities.

1.4. Potential Structure for Tourism

A requirement of the project brief was the determination of a suggested organisational structure to help drive tourism activity and strengthen the benefits from the visitor economy. Determination of an optimum structure needs to be considered in the current somewhat fluid environment created by:

- the NSW State Government desire for local government amalgamations and the potential implications of this on the region and its boundaries which should be known shortly; and
- the recent review of the regional tourism model by Destination NSW and the potential implications for new organisational structures to allow regions to determine their own boundaries and possible structures across local government areas.

Based on The Group's extensive work in restructuring tourism entities across NSW, QLD and TAS as well as in NZ and parts of the South Pacific and South East Asia, we are of the view that unless there are no current entities which can be modified to help better promote and drive the visitor economy, it is neither cost effective or structurally desirable to create new entities for this purpose.

Industry stakeholders are generally very weary of resources being applied to creating new regional tourism entities where much funding is often needed for personnel and related overheads and a disproportionately small amount is actually used to leverage marketing and promotional campaigns.

Furthermore, most traditional regional tourism entities are skilled and focussed on promotional activity but often lacking in expertise to deal with product development, industry development and investment and related public infrastructure. This is now recognised in many areas as highly problematic as so much product is either needing enhancement and-or refocus, and lack of new product and facilities limits accessing new and higher yielding visitor markets.

With these points in mind, the Group considers that assuming SHOROC is able to garner the support of both industry stakeholders and the Councils, that a preferred organisational structure to drive tourism for the region should involve:

- SHOROC and its Councils creating a Tourism Advisory Group[2] (TAG) within the SHOROC organisation structure[3];
- that this TAG comprise a mix[4] of Council representation and industry stakeholders from across the region[5];
- that industry stakeholders should include some representation from the development and investment community especially as new development and investment is likely to be a requirement going forward;

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[2] Our advice would be to avoid calling this a Committee or a Board as you need the ability to move members on with ease and attract new members when needed and the more formal the structure, the greater the challenge in retaining the flexibility to achieve this.
[3] If SHOROC was to change in its Council composition by expanding or contracting its boundaries, it is important that sufficient stakeholders from the Northern Beaches are retained within the TAG to drive specific initiatives.
[4] We would suggest that any TAG comprise no more than 11 members with more than 50% being from industry rather than Government;
[5] If the boundaries of the SHOROC region were to change, you need the ability to engage and second new members quickly and efficiently.

- that the TAG should report to the Board of SHOROC[6] on progress in implementing agreed initiatives and its "game plan" should ideally be a DMP or similar with agreed outcomes detailed in an action plan;
- that ongoing consultation with industry and community be provided throughout the region on a half yearly basis; and
- ensuring that the secretarial costs for the TAG are able to be covered by SHOROC.

The more precise structural details for establishing and operating a TAG should be part of the brief if and when a DMP is created for the region.

1.5. Next Steps

There is recognition amongst many stakeholders of the excellent recreational facilities and amenities which have been created throughout the Northern Beaches. What appears to be lacking are the commercial elements to generate commercial benefit and spinoff to help support and grow the visitor economy on a sustainable basis and, through this, garner greater support from Councils as well as local communities.

SHOROC should consider the following as next steps.

- Discussion and agreement on the findings from this Opportunities Paper.
- Harnessing of the collective political will to move forward and activate greater benefit from the visitor economy through generating higher visitor spend levels.
- Establishing an evidence base to highlight current visitor trends and to effectively monitor growth through creation of a robust visitor database including spend patterns, etc.
- Consideration should be given to creating a destination management plan or similar which can offer a sustainable pathway forward and to address community lifestyle and related concerns.

[6] Or any new regional structure which could result from possible Council amalgamations


AVALON BEACH

2. INTRODUCTION

2.1. Overview

The Stafford Group (The Group) was commissioned by the Shore Regional Organisation of Councils (SHOROC) to develop a Visitor Economy Opportunities Paper (the Paper) for the SHOROC Region (the Region). The Region comprises the local government areas (LGAs) of Manly, Mosman, Pittwater and Warringah.

A key priority for SHOROC under its 2014 – 2018 Corporate Plan is to "*Grow local employment and containment*" and the visitor economy and tourism has been identified as a sector which can potentially facilitate the achievement of this priority. Currently, the visitor economy accounts for 10% of all employment within the Region and comprises 10% of total economic output.

2.2. Objectives

The objectives of this Paper include the following:

- provides an overview of the regional visitor economy currently including key data, plans and programs;
- review and identify key assets, strengths and barriers with regard to the visitor economy;
- considers the unique environment as well as community values and needs and cultural opportunities;
- identify and prioritise regional and local opportunities to enhance the visitor economy and its contribution to the region, leverage existing strengths and encourage innovation in the short, medium and longer term; and
- inform development of a future regional destination management strategy.

It is important to understand this Paper does not offer a destination management plan or tourism strategy, but rather is a precursor, which identifies a number of potential opportunities which could be further explored (along with others) via a destination management plan.

2.3. Methodology

The process to complete this Paper involved the following:

- initial liaison with SHOROC and each Council to gather background information and to discuss the consultation program;
- an ongoing literature review to build a solid context for the Paper and to fully understand projects and strategies as well as relevant government policies affecting the region;
- consultation with SHOROC, each Council as well as tourism industry stakeholders (as advised);
- visits to the Region to review product, meet with operators and assess new opportunities and development sites;

- completion of the estimated net economic benefit tourism generates for the Region and, based on visitor forecasts, what its potential may be over the next 10 year period;
- prioritisation of the opportunities identified based on discussions with each Council, DNSW and tourism industry stakeholders etc;
- compilation of findings into this Paper to highlight issues and opportunities which need to now be considered; and
- presentation of the draft findings to key stakeholders.

The Group would like to take this opportunity to thank SHOROC, each Council and all stakeholders who have assisted in the ongoing development of the Paper.


INSPIRE
DISCOVER!
INTRIGUE...
THE CORSO
NO ENTRY
REGULATIONS OF ACTIVITIES IN THE CORSO
NARRABEEN
COLLAROY
HARBORD
FRESHWATER BEACH
QUEENSCLIFF
NEW YORK
MANLY
VANCOUVER
SYDNEY
THE NORTHERN BEACHES
AVALON

3. LITERATURE REVIEW

The following contains the main findings from the literature review which was undertaken as part of this Paper. The Group has segmented its findings according to those which are relevant to each of the four LGAs in the SHOROC region and those which are regionally (SHOROC) relevant.

3.1. SHOROC

3.1.1. SHOROC 2015 – 2016 Operational Plan

The SHOROC 2015-2016 Operational Plan outlines how SHOROC and its partner councils will work together to build a stronger region and stronger councils. One of the major priorities for SHOROC, as outlined in the Operational Plan, is to "grow local employment and containment" which has direct relevance to the visitor economy. Growing the regional visitor economy will produce many benefits for the region, including additional employment opportunities and will provide the opportunity to keep the region's talent within the region, rather than travelling outside the region for job and career progression opportunities which currently occurs.

The Operational Plan also identifies the need for local and state planning integration on a regional basis. The NSW State Government Visitor Economy Taskforce report sets the goal to double overnight visitor expenditure to NSW by 2020. A particular goal for SHOROC and its member councils is to focus on growing visitor yield, rather than focusing directly on visitor numbers. Any increase in visitor spend, and in particular, on overnight spend in the SHOROC region, therefore, would help contribute to the State's 2020 goals.

3.1.2. Shaping Our Future – SHOROC

The SHOROC Shaping Our Future (SOF) document provides a roadmap for the region – outlining issues the region is currently facing along with strategies for dealing with them to maintain the natural environment, way of life and its contribution to the NSW economy.

The following lists points of specific relevance to the visitor economy from the SOF.

- The region is challenged by inadequate public transport services which can impact accessibility and the desire for visitors looking to travel to the region. Public transport improvements include a bus rapid transit system on the north/south corridor from Mona Vale as well as a new underground Neutral Bay interchange to also serve buses from Sydney's North West, linking to a metro-style rapid transit service to Wynyard using the Harbour Bridge and redundant tram tunnels.

- In addition to public transport issues, general road transport is challenged. The three major routes into the region (Warringah Road/Wakehurst Parkway, Mona Vale Road and Spit-Military Road) all have heavy congestion. It is considered that until public transport options are improved, congestion along these roads during peak periods will continue.
- One of the major directions for the region is sustainably meeting the Metropolitan Strategy targets for jobs. As already noted, expanding the visitor economy and tourism sector provides many opportunities for achieving employment growth, particularly as the visitor economy crosses over many economic sectors (retail, transport, accommodation, arts and recreation services etc.).
- The liveability of the region is high valued by each member council as well as the community. There is a need to ensure that any changes to the visitor economy maintain and enhance the region's liveability rather than detract from it.

3.1.3. Sydney Harbour National Landscape – Experience Development Strategy 2013

The Sydney Harbour National Landscape Experience Development Strategy (SHNLEDS) was developed to provide a more detailed overview of experiences that could strengthen the appeal of the Sydney Harbour National Landscape (SHNL) – one of 16 National Landscapes which were included in Australia's National Landscapes Program.[7]

The SHNLEDS notes the target market for the National Landscapes Program are experience seekers who are attracted to the world-class beaches within the SHNL, including particularly Manly and Bondi.

Experiences noted in the SHNLEDS which directly include the SHOROC region are the following.

- Hero Experience 1: Catch a ferry across to Taronga Zoo and enjoy a stunning walk to Manly. Meander around headlands and sheltered bays with magnificent harbour views, parks and historic houses before reaching Manly for an overnight stay at Q Station. Enjoy a dazzling sunrise at North Head in the morning before catching a boat across to Watsons Bay for a walk to The Gap and South Head before returning to stay a night at Watsons Bay or alternately carry onto Nielsen Park to catch a boat back to Circular Quay.
- Hero Experience 2: Travel to Pittwater, transferring to kayaks and paddling with Aboriginal guides to a secluded bay for an overnight camp. Continuing on the next day, stopping at islands that includes helping out conservationists with the little penguin colony on Lion Island and seeing Aboriginal and historic sites before another overnight stop. A short walk above the camp provides amazing sunset views. OR: A seaplane flight or tall ship voyage to Pittwater to start an overnight trail linking ridge lines,

[7] The boundary of the SHNL is The boundary of the Sydney Harbour National Landscape extends broadly from Ku-ring-gai Chase National Park in the north to Royal National Park in the south, and Parramatta in the west,

secluded bays, private accommodation, stunning viewpoints to catch the rising or setting sun. Return via seaplane, tall ship or shuttle, watching for whales along the way.

- Project 1 – "Create the world's best harbour walking experience": This involves creating a harbour walk which can be undertaken both as a day trip but also as an overnight experience. The proposed walk includes attractions/areas such as Taronga Zoo, Manly Spit, Q Station etc.
- Project 2 – "Establish a world-class journey on Pittwater": This involves the creation of a journey in and around the Pittwater/West Head – Cowan Water – Hawkesbury River area of Ku-ring-gai National Park. Options proposed include a multi-day kayak journey or a walking trail combining boat access and private accommodation.

3.2. Manly

3.2.1. Manly Community Strategic Plan (MCSP)

The MCSP identifies four primary economic themes to deliver on the community vision. Within the second theme is "a viable Manly for work, employment and infrastructure":

- a diversified and balanced Manly economy that caters for locals and visitors alike;
- tourism is recognised as a critical part of the local economy;
- Manly has a variety of sustainable transport and car alternatives; and
- improved amenities and physical infrastructure services in Manly.

The MCSP states Manly receives "over 6 million visitors"[8] which is interesting to note, considering DNSW statistics shows Manly LGA receives just over 2m visitors per annum.[9] The discrepancy in this figure may be because DNSW considers a visitor to include only those who travel more than 25km to get to a destination whilst the original figure (6m) may include visitation to Manly by locals and may include a significant repeat number.[10]

When assessing visitor statistics and visitor impact, it is important that the benefits derived by locals and true visitors is separated as the quantifiable benefits from locals versus true visitors cab differ significantly.

Tourism is noted in the MCSP as "providing a major source of employment as well as goods and services".[11] The challenges for Council in growing a sustainable visitor economy for Manly are noted as:

- management of a high volume of visitors and tourists;
- associated real/perceived increases in traffic, litter, garbage and noise; and

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[8] Page 37, Manly Community Strategic Plan
[9] DNSW's figure is based on a three year average because of small sample sizes (Manly Visitor Profile, DNSW).
[10] We note Council uses Manly Ferry Information and statistics from its car park numbers to estimate visitor numbers.
[11] Page 37, Manly Community Strategic Plan

- resident's concern regarding the preservation and protection of the natural environment, built heritage and sense of community and its amenities which are considered drawcards for visitors.

Community engagement revealed that an important economic consideration included the promotion of "tourism as an important part of the local economy".[12] As part of this, the community consider the following important:

- recognising that whilst tourism is a vital part of the economy, a diversification approach to the economy needs to be followed to ensure Manly is not "putting all its eggs in one basket";
- this includes offering/exploring new opportunities and providing a greater balance between visitor needs and resident/worker needs;
- initiatives that achieve this were noted as potentially including greater collaboration with the State and National tourism bodies (DNSW and Tourism Australia respectively), niche marking and benchmarking Manly's environmental/heritage qualities and assets to encourage a boutique approach; and
- the quality of shopping (diversity of the retail mix) was considered a key requirement to growing marketing appeal of Manly and encouraging certain visitor markets.

The second economic goal noted in the MCSP is "Promote tourism as an important part of the local Manly economy". Under this goal are the following strategies (to be delivered over the next 10 years):

- Develop a Manly Tourism Management strategy;
- Promote Manly as a visitor destination and provide local tourism and visitor services; and
- Deliver events and activities to entertain, educate and involve Manly's community.

3.2.2. Hello Manly

We note Council, through its tourism program, supports a Manly Tourism website www.hellomanly.com.au and the Hello Manly Booking and Information Centre.

The Hello Manly website offers an attractive gateway to the Manly region, providing a wide variety of visitor information, an event calendar, travel itineraries, videos and an online shopping facility for Manly merchandise.

Manly is the only LGA in the SHOROC region to have a dedicated destination/visitor information website.

3.2.3. Other Resources

Council also has a tourism sub-page on its official Council website (www.manly.nsw.gov.au) which provides a brief overview of tourism and which links visitors to the Hello Manly website.

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[12] Page 40, Manly Community Strategic Plan

Council also has a "what's on" sub-page on its website which details a number of events and profiles the LGA's four signature events:

- Australia Day 2016;
- Manly Fresh Produce Market (weekly event);
- Manly Jazz; and
- Manly Vibe.

3.3. Mosman

3.3.1. Mosman Community Strategic Plan 2013 – 2023

The Mosman Community Strategic Plan (MOSCSP) includes a number of themes which reflect Mosman's Vision and the underlying values and commitments that support the vision. The themes that direct Council operations include social, environment, economic and governance.

The Table below provides a summary of the tourism-relevant themes and associated programs, directions and strategies.

TABLE 1: MOSCSP TOURISM-RELEVANT PROGRAMS

Theme	Program & Direction	10 Year Strategy
Social	▪ Arts and Culture - A place of cultural excellence that nurtures contemporary arts practices; that celebrates the richness of Mosman's distinctive local culture and heritage; and that delights, challenges, engages and inspires.	▪ Support, develop and showcase a broad range of contemporary arts, artists and arts practices, with special emphasis on the visual arts ▪ Deliver and support events and other projects that celebrate Mosman, drawing inspiration from the area's artists, history, demographics, lifestyle and environment ▪ Engage and extend arts audiences while building patronage and broad community support of local cultural activities ▪ Promote the cultural services and programs provided and supported by Council to a wide audience
Environment	▪ Community Spaces - Public spaces and places that anticipate and respond to community needs, that promote opportunities to connect, and that complement other local services and facilities.	▪ Provide, manage and maintain public land for the benefit of residents, businesses and visitors ▪ Deliver civic and public spaces that promote community connections, complement Mosman's character, foster vitality in local business precincts and incorporate safe, accessible, functional and well-designed facilities
Environment	▪ Traffic and Transport - Transport infrastructure and services that are safe, efficient, provide Mosman-friendly solutions, and promote access and mobility.	▪ Have a managed parking strategy to meet the demand of residents and visitors

Theme	Program & Direction	10 Year Strategy
Economic	▪ Local Economy - A strong local economy where businesses are in tune with local needs and where planning, services and infrastructure help support economic prosperity.	▪ Sensitively promote Mosman's unique qualities, heritage and identity as part of local and regional Initiatives ▪ Capitalise on regional, State and Federal initiatives to help support businesses and the local economy

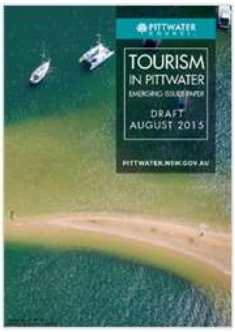
3.3.2. Other Resources

Mosman does not currently have a separate website to promote the LGA as a visitor destination. It does, however, have a sub-page on its official Council website which provides a general overview of attractions and events throughout the LGA. This, however, is not labelled as a tourism sub-page but rather is listed under "recreation".

The opportunity exists to create a regional destination website, which promotes the SHOROC region under a unique destination brand and which provides sub-portals for each of the LGAs and represents the unique look and feel of each of the LGAs.

3.4. Pittwater

3.4.1. Tourism in Pittwater – Emerging Issues Paper (Draft August 2015)



The Tourism in Pittwater - Emerging Issues Paper (EIP) was developed to[13]:

- help increase the overall recognition of the tourism business sector, as a major source of local economic development by government and the business sector;
- assist the alignment of local and relevant state strategies underpinning tourism; and
- be a useful tool for educators, investors, tourism operators and wider business community for implementation of their own plans.

Interestingly, it is the only tourism-specific strategy/paper which has been developed in the past few years for any of the council areas in the SHOROC region.

The strategic objectives for the EIP are noted as:

- to promote and encourage local employment opportunities;
- to work with other councils and authorities to increase sub-regional employment opportunities;

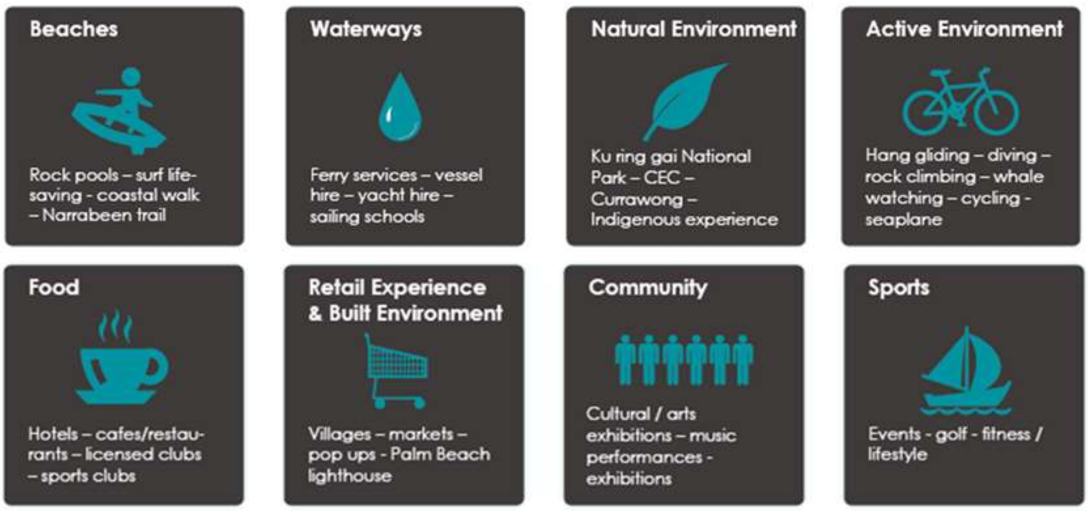
[13] Page 8, Pittwater Emerging Issues Paper

- to support new and existing businesses compatible with Pittwater's values, vision and community aspirations;
- to foster business opportunities through innovative technologies;
- to foster and encourage local and regional training and apprenticeship opportunities;
- to create expanded opportunities for business through a range of planning initiatives;
- to encourage diverse retail and commercial opportunities within town and village centres;
- to promote opportunities for sustainable tourism;
- to recognise and promote the importance of key workers;
- to promote sustainability principles within the Pittwater business community;
- to support and promote local and regional business networks;
- to attain state-of-the-art telecommunications infrastructure including broadband access for the entire Pittwater area; and
- to encourage home-based businesses.

Pittwater considers a sustainable tourism sector as one that:

- our day trippers / visitors will enjoy their time in Pittwater, and will want to travel here for the unique and sustainable tourism experiences we offer;
- tourism-related businesses will be financially profitable, able to reinvest in their businesses, and attract and retain the skilled workers they need;
- the natural environment will be protected and enhanced; and
- we work collaboratively with business and the wider community for mutual benefit.

The "Pittwater Experience" is noted as:



Challenges in growing the visitor economy are noted within the EIP as the following.

- Pittwater Council relies on local communities and operators to produce information, which lacks consistency and destination branding. The availability of information on the natural, cultural and heritage features of the region is especially limited.
- Limited accommodation choice and options for locals and international visitors.
- To attract increasing numbers of visitors / tourism opportunities to increase jobs and spend in town and village centres.
- To ensure greater collaboration locally for public transport accessibility (including walking & cycling and go get) options for visitors throughout Pittwater.
- Continue to lobby state government through the new SHOROC Economic Development Working Group to construct the Bus Rapid Transport system (BRT) to help promote & increase regional tourism visitation.
- Shortage of key workers to support tourism-related small business growth.
- Improve town and village centre beautification, connectivity and vibrancy to create a welcoming atmosphere for visitors.
- Further development of partnerships between Council, local businesses and business organisations are needed to identify and promote sustainable tourism and future development opportunities.
- Community concerns regarding noise, anti-social behaviour, and rubbish associated with day trippers and longer stay visitors.
- The preservation of significant sites – particularly Aboriginal sites – is of key importance.
- Cultural events/assets that are available within Pittwater tend to have a small pool of visitors.
- Conservation of the natural environment is a concern for a large number of Pittwater residents.
- Leverage greater support from NSW State agencies such as The Small Business Commissioner's Office to grow, support and foster tourism sector businesses in town and villages.
- Improve the current 6 out of 10 respondent rating for Pittwater as a tourist destination.
- A lack of tourist / visitor accommodation limits length of stay for visitors to Pittwater.
- Lack of market visibility / identity in Pittwater as a tourist destination.
- Limited public transport to allow greater access to Pittwater beaches, waterways and national parks.

Opportunities for tourism development as noted in the EIP include the following.

- Quality Information - Preparation of high quality information on the natural, cultural and heritage assets of the area to form the basis for interpretation, signage and promotion, and be available in traditional and digital forms.
- Employment Opportunities - Increasing employment opportunities in industries associated with tourism and leisure from consumption of goods and services by tourists and taxation revenue from tourism-related businesses.

- Networks and Relationships - Continuing to build networks and relationships with relevant agencies that support tourism businesses Eg.– NSW Trade & Investment, Destination NSW, NSW State Chamber of Commerce, Tourism Australia.
- Stakeholder Engagement - Tourism providers to work closely with Aboriginal groups, associated stakeholders and heritage assessment professionals to ensure tourism is conducted in a sustainable way. There is potential for event organisers to tap into cultural promotional tools that cater to wider audiences such as Arts Hub, the Feed, Spectrum, Destination NSW events.
- Connectivity - Business and existing tourism providers forging connections to elicit greater outcomes for Pittwater. Potential outcomes include: overnight stays in Pittwater should accommodation be available; cross-promotion with other tour providers; and connection with retail and hospitality.
- Pittwater Artists Trail - Scope to build on the success of the Pittwater Artists Trail, with positive results for participating artists, audiences and Pittwater's tourism providers. Suggestions include: increased promotion through business Chambers and a collaborative tourism association; working with local accommodation providers, YHA etc. to create "open weekend" packages/specials; running shuttle buses on open weekends; leveraging and leveraging existing events and activities to increase access to the trail.
- Culture and the Arts - Scope to attract more visitors and investors with a higher number of cultural offerings (for instance, to market an area as an "arts area", or to promote a range of arts activities under one promotional/festival umbrella.
- History and Heritage - Sharing stories about Pittwater's Aboriginal history, and in particular encouraging visitors to connect with these histories through visits to heritage sites in Ku-ring-gai National Park and surrounding areas.
- Enliven Pittwater- Council's continued support for Enliven Pittwater activities and place management programs across town and village centres which include: upgrading of public spaces, urban renewal, cultural and streetscape activation.
- Local Tourism Interest Group - Council initiating a tourism interest group as a vehicle to help drive tourism in Pittwater. Council's role is seen as important in developing the sector and working in partnership with Chambers of Commerce, business and individual providers / tourism-related businesses with support from the NSW State government.
- Cultural Economy - Continuing to foster a Night Time Economy (NTE) with local chambers, other networks that can also be a 'cultural economy', providing the opportunity to create events that reflect the community's values and tastes, for example, pop-up live music performances and movies.
- Education Memorandum of Understanding - Helping to foster the relationship with education provider - NSI TAFE NSW into the future, a simple tourism – oriented Memorandum of Understanding (MOU) would highly benefit both parties, relating to sharing information relating to jobs in this sector, tourism planning, education and small business development for Pittwater.

- Tourist/Visitor Information - Investigation of the opportunities for street kiosks, and tourism - related information availability such as free brochures, maps, local café directories, both locally and CBD Sydney.
- Networks Collaboration - Council and Pittwater Chambers of Commerce / Pittwater Business Ltd can play an important role in linking those looking for work and those businesses seeking workers.
- Tourism Ambassadors - Tourism Ambassadors - encouraging volunteers who donate their time to welcoming visitors and providing tourism and event information about products, services and experiences.
- Lifestyle/Wellness Cluster - Investigation of a lifestyle / wellness product cluster focusing on spa / wellness tourism, natural therapies, fitness and cuisine
- Destination Management Plan - A Destination Management Plan (DMP) for Pittwater in partnership with the SHOROC Economic Development Working Group.
- Currawong - Greater marketing / promotion of Council's Currawong accommodation including for weddings, community, business and filming. Expansion of public and private accommodation facilities.
- Home and Away - Leverage greater promotion of Palm Beach, Surf Club and village with producers of Home and Away accommodation including for weddings, community, business and filming.
- Coastal Environment Centre - Profiling Council's Coastal Environment Centre (CEC) role to provide a range of natural environment information as well flyers / brochures and information to support local tourism businesses
- Place Planning - Consideration to more flexible zoning where tourism activity is permissible, as part of the place planning in Mona Vale, Newport and Avalon
- Council Assets - Greater promotion / marketing of Council owned / operated lifestyle and tourism assets – surf clubs, golf courses, indoor sports centre
- Seminars and Workshops - Continue to provide and partner business seminars / workshops to support start up and home based tourism –related businesses and ensure an emphasis on the 18 – 35 year olds.
- Night Time Economy (NTE) - Councils continued engagement, promotion and familiarisation of the Night time Economy concept with relevant Pittwater businesses – town and village centres.
- Sister-State Relationship - Investigate an economic development-based international sister – state relationship relevant to Pittwater's visitor economy
- Collaborative Events - Continuing to foster a Night Time Economy (NTE) with local chambers, other networks that can also be a 'cultural economy', providing the opportunity to create events that reflect the community's values and tastes.
- Learn, Participate and Contribute - Continue to learn, participate and contribute to relevant forums / conferences related to place activation planning, accessibility, urban design and tourism across Sydney

- Niche Visitor Markets - Target niche visitor markets to match the ambience of the Pittwater area – weddings, health /fitness / lifestyle, sport Increase stakeholder involvement in major event tourism and grow brand equity through innovative approaches
- Accommodation - Investigate investment attraction opportunities for boutique hotel accommodation for Pittwater.

3.4.2. Pittwater Economic Development Plan 2012-2016 Discussion Papers

The Pittwater Economic Development Plan 2012 – 2016 Discussion Papers seeks to create an environment that promotes sustainable business growth, investment and employment generation and which integrates with regional and state initiatives and is linked to Council's long-term goals, strategies and outcomes.

Visitor economy-related findings/opportunities are noted as the following.

- Pittwater is noted as offering extraordinary natural environmental advantages which present opportunities to link education opportunities with tourism and accommodation initiatives.
- The Northern Beaches region is traditionally a "summer destination" and the tourism sector, therefore, is very seasonal.
- Pittwater's tourist attractions are well known but do not attain their potential. Transport infrastructure and services are an impediment. New strategies are needed to expand local experiences including cultural and educational tourism and visitation with cafés, restaurants and local activities, and create stronger linkages between beaches, waterways and villages.
- Tourism-related issues expressed through consultation include: the lack of tourism promotion by Council, difficulties in finding services/accessing places of interest and other amenities, poor signage, the need for business services (such as banks to open at weekends for locals and visitors).
- Tourism and accommodation is noted as a key business employment sector for Pittwater.
- The development of a Regional Tourism Plan is listed as an opportunity for the LGA and which should identify strategies to increase visitor spend in the LGA and wider region.
- To strengthen the economy, evidence suggests that the major focus should be on land-use planning, infrastructure investment and business-attraction initiatives to support the growth and consolidation of (amongst others) tourism, with an emphases on enlivening villages and expanding entertainment, eco and cultural-tourism opportunities for domestic and international visitors.
- A key challenge for the LGA is attracting sufficient visitation/tourism to town and village centres to ensure the viability of local retailing.

- The opportunity exists to examine opportunities to strengthen regional visitation/tourism around village centres particularly at Avalon, Newport and North Narrabeen to capitalise on their proximity to natural assets such as beaches and Narrabeen Lagoon.
- Consultation revealed the need for a Pittwater destination website as well as potentially a tourism information kiosk.

3.4.3. Other Resources

Pittwater Council does not currently have a separate website to promote Pittwater as a visitor destination. It does, however, have a sub-page on its official Council website which provides a general overview of attractions and events throughout the LGA. Similarly to Mosman, this is not listed as a tourism sub-page but rather is titled "My Lifestyle".

The opportunity exists to create a regional destination website, which promotes the SHOROC region under a unique destination brand and which provides sub-portals for each of the LGAs and represents the unique look and feel of each of the LGAs.

3.5. Warringah

3.5.1. Warringah Economic Development Plan 2011

The Warringah Economic Development Plan 2011 (WEDP) outlines a number of action-based local and regional business activities (to be undertaken over a four year timetable) which will drive economic development throughout the LGA.

The WEDP includes a number of comments/strategies which are relevant to tourism, including the following.

- Council currently supports a range of events and programs which generate greater awareness and positive perceptions in the community. Art, cultural, business and environmental-related events as well as exhibitions, festivals and theatre help showcase the region and support the development of new business and jobs generation.
- The community engagement process revealed the need to identify a series of "local economic development drivers"[14]. One of the drivers identified included "Natural Assets" and recognises the LGA is home to world-class, well-known natural assets (beaches, waterways, and national parks).
- The development and support of local/regional business clusters is an action area of work for the WEDP. Some clusters identified strongly align with tourism and offer the potential to attract higher-yielding visitor markets, including equine, marine business (sail making, yacht design, surf clothing, water-based tourism), creative industries and health/wellness business.

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[14] Page 40, Warringah Economic Development Plan 2011

Identified priority actions in the WEDP include the following.

- Support a Business Development / Marketing Strategy for the Dee Why Town Centre to activate and help reinvigorate Brookvale – Dee Why as a distinctive, attractive and sustainable business location for the Northern Beaches.
- Research leading business clusters relating to 'new economy' operations for IT&T / Medical / Marine / Creative Industries / Professional services / Green Tech / Retail. Develop at least one group identifying key stakeholders, NSW State and Federal policy and program support, skills, business improvement.
- On-going engagement, hosting and supporting key seminars, workshops, events and speakers in collaboration with NSW / Federal Government agencies, Chambers and other local business stakeholders.
- Facilitate and support the growth of local and regional business networks (e.g. Micro businesses, export, education) that help to promote networking, jobs growth and employment containment
- Support, liaise and partner with the Events, Natural Environment, Human Resources or other areas of Council for business – related events that engage the local business community and promote the economic focus areas of the Economic Development Plan.
- Support Council's strategic land use planning and policy initiatives that help to enhance local amenities, attract visitors and customers to improve business viability.

3.5.2. Warringah Community Strategic Plan 2014

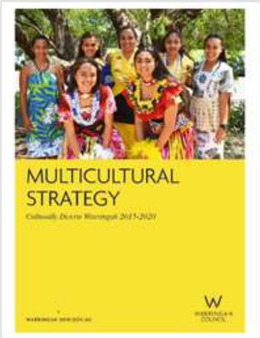
The Warringah Community Strategic Plan 2014 sets out the long term aspirations of Warringah residents and reflects where they want to be in ten years. The Strategy outlines a six community outcomes and a range of objectives sit under these. The outcomes are:

- Vibrant Community;
- Lifestyle Recreation;
- Health Environment;
- Connected Transport;
- Liveable Neighbourhoods; and
- Working Together.

Under Vibrant Community outcome, cultural events are noted as a driver and which are related to the visitor economy. This includes the following continuing activities:

- Coordinate civic events e.g. citizenship ceremonies;
- Coordinate landmark events e.g. Australia Day;
- Cultural development projects and cross cultural events;
- Community festivals;
- Exhibitions; and
- Manage the cultural development grants program

3.5.3. Warringah Multicultural Strategy (Sept 2015)



The Warringah Council Multicultural Strategy (WCMS) provides a framework that outlines Council's commitment to developing an inclusive community and culturally diverse community. The WCMS recognises the diversity of the LGA's population, noting that 28.1% of Warringah residents being born overseas.[15]

The WCMS' purpose is to provide direction for Council as well as partnering organisations to provide a framework for service delivery.

The WCMS outlines a number of events (such as Harmony Day, Guringai Festival, Australia Day) and assets which promote cultural awareness.

3.5.4. Draft Open Space Strategy (A Spirit of Play)

The draft Warringah Open Space Strategy (WOSS) provides a suite of overarching strategic directions to guide and inform the future management of the LGA's open spaces and activities within these spaces. The WOSS identifies local physical assets throughout the LGA as well as trends in recreation participation.

Recommendations and points noted in the WOSS which are related to tourism include the following.

- Warringah has a wide variety of recreation opportunities across both land and water. The LGA boasts 14km of coastline, nine beaches, four lagoons, two national parks and a wide variety of open spaces. The opportunity exists to leverage off these natural assets through the creation of a range of passive and interactive activities.
- The LGA has a rich Aboriginal landscape with many heritage sites. *Tourism Australia research indicates a declining demand for Indigenous tourism product, however, what they have not been able to determine is the cause for this decline – is there simply not enough product currently available or product which is of a high enough quality*. With Warringah's close proximity to Sydney (Australia's major gateway), the opportunity could exist to leverage off this Aboriginal history and create a high quality visitor experience (if the quality of Aboriginal heritage within the LGA is high enough) to attract, in particular, a cruise visitor market.
- Warringah is fortunate to have a mix of coastal and national park spaces which offer the opportunity for the creation of extensive walking, cycling and horse tracks. Existing tracks/walks which are popular include:
  - the recently completed Narrabeen Lagoon Trail provides the community and visitors with an 8.4km loop-track and has been well-received; and

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[15] Page 2, Warringah Multicultural Strategy

  - the Bicentennial Coastal Walk which covers 14kms of Warringa's coastline and continues on to North Head in the south and Barrenjoey in the north and covers roughly 30km as a continuous walk.
- There is a recognised need, however, for the continued improvement of other key trails throughout the LGA. The development of a trail along South Creek (noted in the Dee Why Valley and South Creek Corridor Plan of Management 2008) is proposed which would provide access to Narrabeen Lagoon and Dee Why from Beacon Hill.
- Council currently manages an 11km mountain bike track at Manly Dam and, we note, is currently formalising an access trail across Council land in Forestville Park to create a link with the new mountain bike trails in Garigal National Park. We also understand Council is going to provide a bike dirt jump track in the LGA (location to be decided).
- Whilst Warringah has extensive biking trails and mountain biking tracks, there is currently no "learn to ride" circuit. The opportunity exists to potentially create a regionally significant learn to ride course.
- One of the key barriers to providing additional/improved open spaces is finding an appropriate location. Residents throughout the LGA generally do not want to see any increased use of areas close to their homes because of concerns of noise, litter, parking and traffic congestion.
- Council currently provides eight off-leash dog areas. According to the Companion Animals Act (NSW) 1998, each LGA is required to provide at least one off-leash dog area. With Warringah's eight off-lease areas, they are providing well above the legislative requirement. Pet tourism is considered to be one of the fastest growing tourism sectors. Potential exists to make Warringah a "pet friendly" tourism destination.
- The Terrey Hills and Duffs Forest area has significant horse riding communities and a network of trails which are horse-accessible. Council will seek to continually upgrade trails and arenas in the LGA (as funding becomes available). The equine tourism sector is considered a high yielding visitor market and could offer potential for Warringah.

3.5.5. Creative Warringah Strategy

The Creative Warringah Strategy 2014 – 2020 (CWS) sets out a number of goals and strategic directions for how Warringah achieves its vision[16] for creativity within the LGA.

The CWS sets a number of goals for achieving the vision which include:

- Goal 1: Creative confidence - To empower our community members and Council staff to be adventurous and open to new possibilities, ideas and perspectives;

[16] The vision is noted as: "Our community is enhanced in its cultural life, connections and wellbeing – catering for all generations and needs" (Creative Warringah Strategy, Page 2)

- Goal 2: Creative spaces and places - To create environments which are welcoming, surprising and good for people;
- Goal 3: Celebration and activation - To create a sense of life and vibrancy in our communities through cultural events, celebrations and 'happenings';
- Goal 4: Collaboration and networks - To strengthen partnerships with artists, creatives, community members, the local business community and other stakeholders to promote cultural development in Warringah; and
- Goal 5: Public art and creative expressions - To integrate public art and creative expressions into our places, projects and programs.

3.5.6. Other Resources

Warringah Council has a tourism sub-page on its official Council website, titled "Play". This contains basic information regarding visiting the LGA as well as an events calendar.

The LGA does not currently have a dedicated website for promotion of Warringah as a visitor destination but as stated previously, the opportunity exists to create a regional destination website, which promotes the SHOROC region under a unique destination brand and which provides sub-portals for each of the LGAs and represents the unique look and feel of each of the LGAs.


TARONGA
ZOOLOGICAL PARK
1916

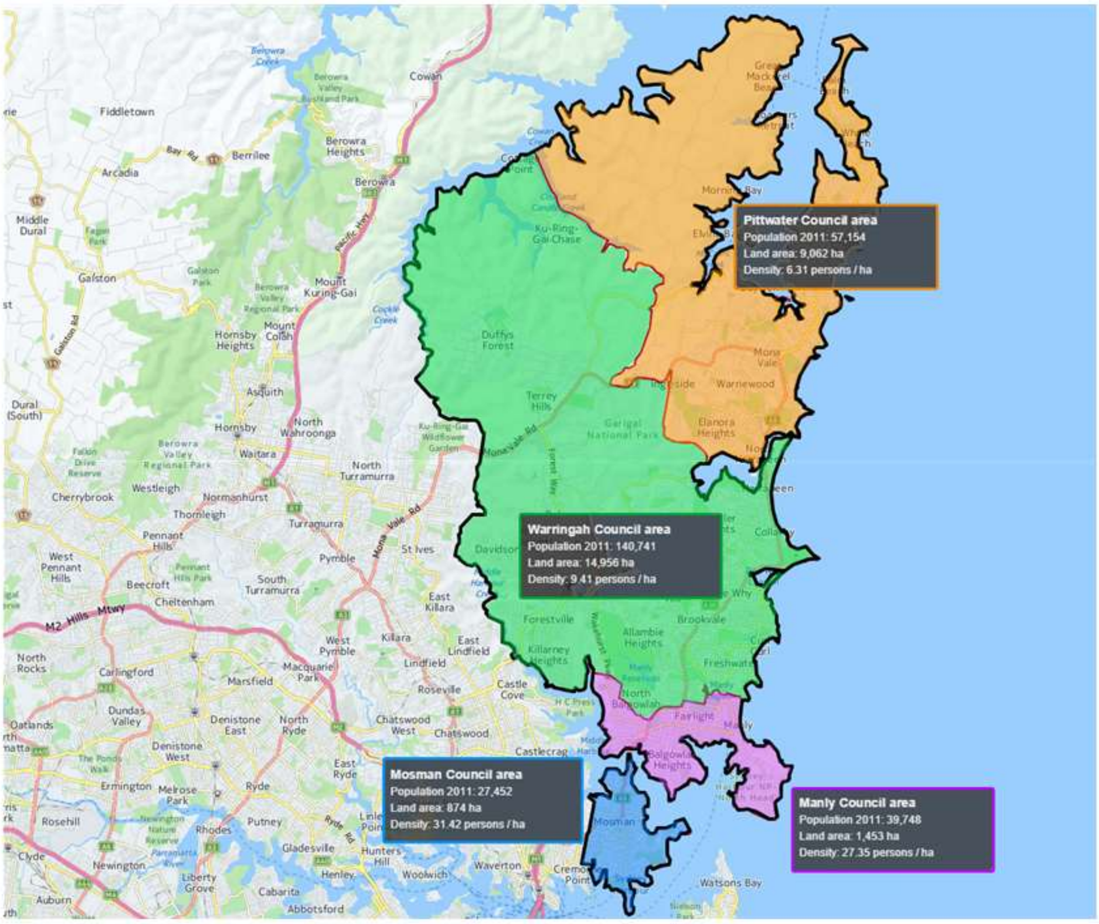
4. SITUATION ANALYSIS

4.1. About the Region

The SHOROC region covers an estimated 288 square kilometres and, as of 2014, is home to just under 294k residents.[17] The region comprises the LGAs of Manly, Mosman, Pittwater and Warringah (see Figure 1 below). Based on the 2011 census, over half (53%) of SHOROC's population resided within Warringah LGA, followed by 22% in Pittwater, 15% in Manly and the remaining 10% in Mosman.

The SHOROC region has a very strong recreation focus by virtue of its significant water, national park and open space-based natural assets. These include the region's beaches, the Hawkesbury River, Narrabeen Lake, Ku-Ring-Gai Chase National Park, Garigal National Park and many more.

FIGURE 1: THE SHOROC REGION



[17] http://profile.id.com.au/shoroc

4.2. Visits to the SHOROC Region

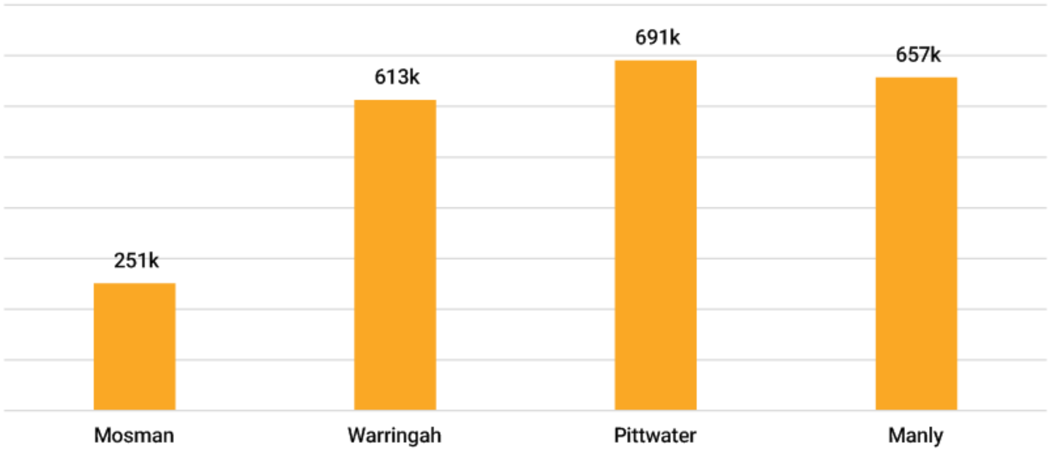
4.2.1. Visits to the LGAs[18]

The following provides a summary of visitation to the LGAs within the SHOROC region. It is important to note that visitation data at an LGA level can, at times, have sample size issues. As such, when producing LGA-based visitor data, DNSW provide statistics based on a four year average. It is also important to note that a visitor is considered someone who travels more than 25km to visit a destination so locals would be excluded.

Over the four year period from 2012 – 2015, the LGAs within the SHOROC region received 2.2m visits. Importantly, this does not represent unique visitation, but rather represents those who travelled and spent time in one or more of the LGAs listed. By way of example, if a visitor spent a night in Warringah LGA as well as Manly, they would be counted as two separate visitors.

The DNSW data, which is based on the National Visitor Survey and the International Visitor survey demonstrates that Pittwater received the largest number of visits, with approximately 691k visits per annum. This is followed by Manly (657k), Warringah (613k) and Mosman (251k).

FIGURE 2: VISITATION TO EACH LGA

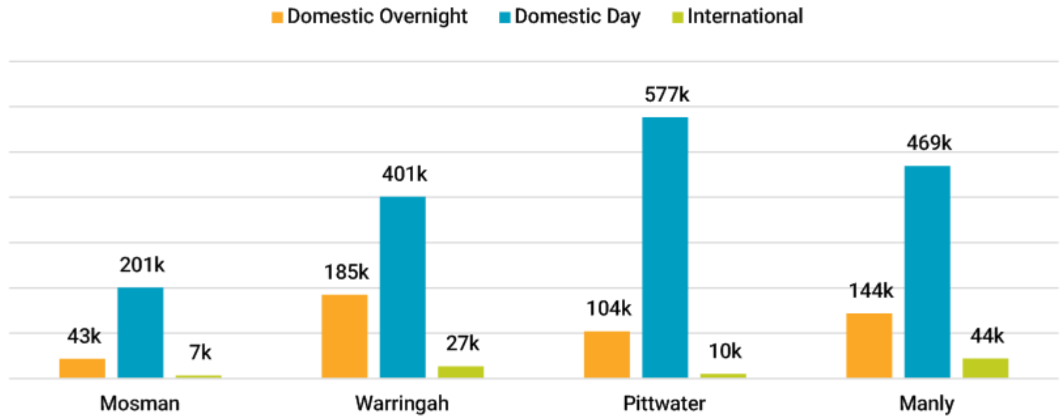


[18] Based on a special data request to DNSW

Figure 3 below provides a summary of visitation based on visitor type. This demonstrates the following:

- the Warringah LGA receives the largest number of domestic overnight visits, at just under 185k per annum;
- Pittwater LGA, on the other hand, receives the largest number of domestic day visits (577k), followed by Manly (469k);
- as anticipated, because of its international brand recognition, Manly receives the largest number of international visits, with 44k visits undertaken per annum; and
- Mosman receives the smallest share of visits across all visitor types.

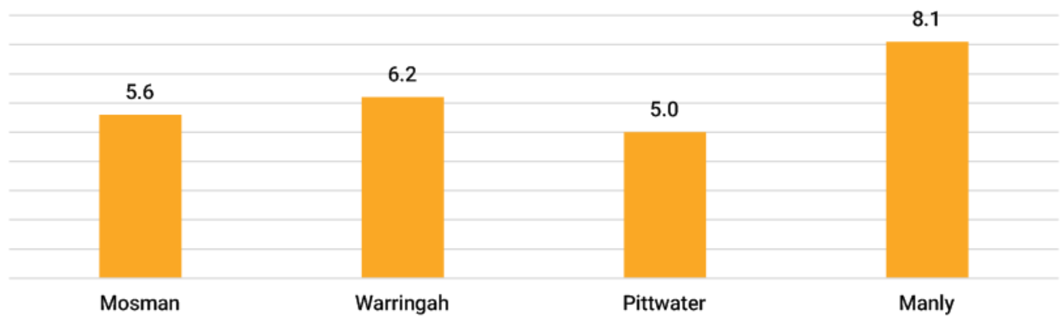
FIGURE 3: BREAKDOWN BY VISITOR TYPE



4.2.2. Average Length of Stay

Based on the data provided by DNSW, Manly has the highest average length of stay (ALOS), with visitors, on average, staying 8.1 nights per trip (see Figure 4 below). We consider this is because of the extended length of stay of backpackers and students who, based on anecdotal feedback, tend to visit Manly in greater numbers than other areas. This is followed by Warringah (6.2 nights), Mosman (5.6 nights) and Pittwater (5.6 nights).

FIGURE 4: AVERAGE LENGTH OF STAY



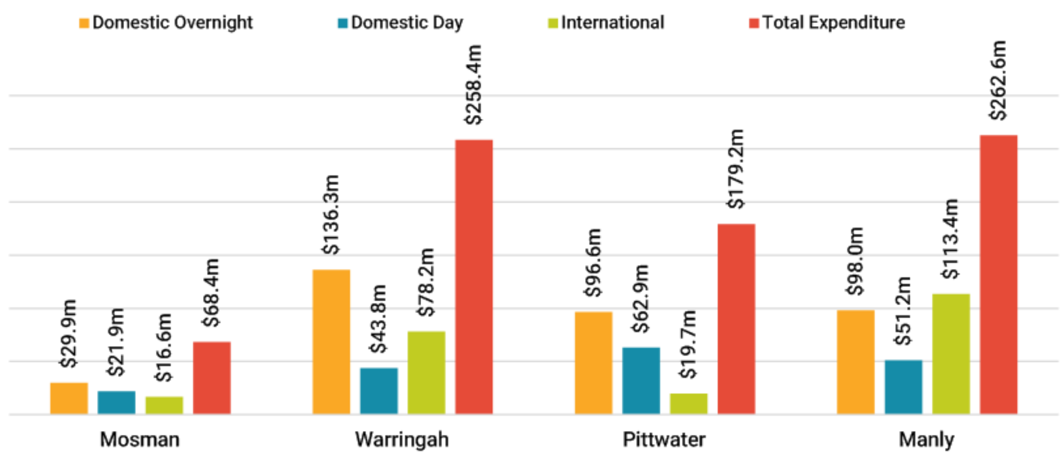
THE STAFFORD GROUP

4.2.3. Total Spend

Figure 5 below provides a summary of total visitor expenditure in each of the LGAs in the SHOROC region. Based on this data, Manly receives the highest visitor expenditure, with spend averaging $262.6m per annum over the four year period assessed. Interestingly, the highest spend originates from the international visitor market ($113.4m per annum). Manly is the only LGA where international spend exceeds domestic overnight spend.

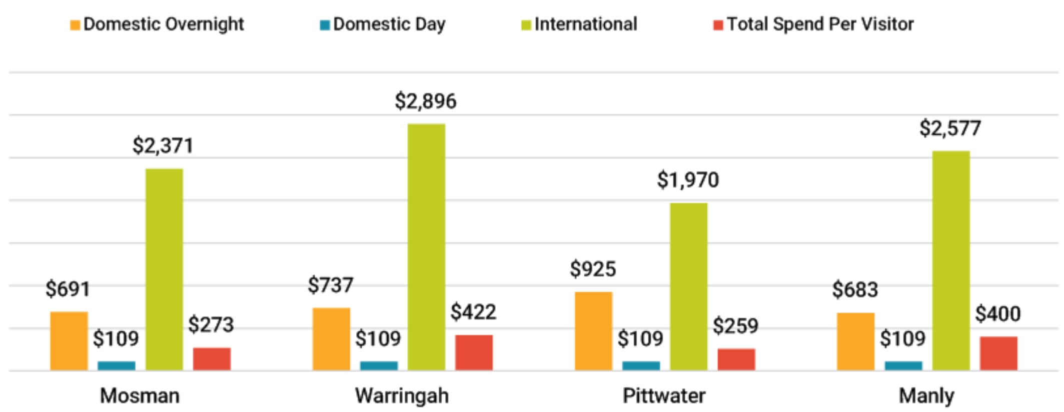
Warringah receives the second highest visitor expenditure at $258.4m per annum. In contrast to Manly, however, the majority of this spend (over half) is generated by the domestic overnight market.

FIGURE 5: TOTAL SPEND



The following Figure provides a summary of visitor expenditure, on a per visitor basis. This shows that across all the LGAs, international visitors are the highest yielding visitors, followed by domestic overnight visitors. This demonstrates that far greater yield is achieved from overnight visitor markets as opposed to the domestic day market.

FIGURE 6: SPEND PER VISITOR



4.3. Swot Analysis

The following offers a regional (SHOROC) SWOT assessment.

STRENGTHS	WEAKNESSES
▪ Quality of natural assets and the environment ▪ Distance to the Sydney CBD ▪ The beach and lifestyle brand of the Northern Beaches ▪ Use of parts of the region for films-television programs ▪ Major events ▪ Walking and cycling trails ▪ Size and quality of National Parks ▪ Taronga Zoo as the major visitor attraction in NSW ▪ Hotel management schools, education institutions and number of students ▪ Dedication of existing tourism operators to the region	▪ Lack of commercial activity to expand the visitor economy ▪ Lack of medium to larger sized tourism operators to leverage marketing and other programs ▪ Lack of destination awareness to a wider market ▪ Traffic congestion ▪ Beach and coastal car parking limitations ▪ Community concern over visitor growth and sustainability ▪ Lack of designated tourism zones, hubs or precincts to encourage investment and development ▪ Rules, regulations and policies restricting tourism growth and commercial initiatives with heritage, culture and nature based environments ▪ Lack of perceived sufficient tangible social and economic benefits to stimulate greater Council involvement in the visitor economy ▪ Lack of commercial accommodation ▪ Perception as a day visitor market experience ▪ Finding skilled and experienced workers for the tourism sector and ability to retain them ▪ Outflow each day of workers from the region ▪ Lack of visitor information services across the region ▪ Significant numbers of individual strategies and plans but limited activation to date into jobs and economic benefits for tourism ▪ Lack of an integrated tourism strategy (DMP) for the region ▪ High seasonality limiting business profitability and sustainability
OPPORTUNITIES	**THREATS**
▪ Raise destination awareness ▪ Create commercial nodes to grow visitor spend and employment ▪ Create a regional strategy which focusses on growing visitor yield rather than numbers ▪ Introduce new product to appeal to clearly identified niche markets ▪ New appropriately scaled tourism accommodation into select areas ▪ Expand shoulder seasons and low season through new events and products ▪ Encourage more water based transport services into the region for leisure and commuting options ▪ Continue to lobby for improvements to public transport services ▪ Develop a robust visitor database of data to support ongoing and improved Government funding for the region for tourism and to create robust trend analysis ▪ Grow the overnight and higher yielding visitor markets	▪ Lack of local political will to grow the visitor economy ▪ Government Red tape delaying and demotivating commercial operators ▪ Lack of ability to attract commercial operators due to terms and conditions ▪ Community nimby concerns driving Council response to visitors ▪ Economic downturn overall ▪ Lack of commercial accommodation continuing to create reliance on the day visitor markets ▪ No timely solutions to traffic congestion which limits interest from tour operators to bring in groups

4.4. Economic Impact of Tourism

Within the ABS, tourism does not have its own sector classification. This is because tourism is considered to be an amalgamation of many industry sectors such as accommodation, food and beverage, transport etc. Too often, communities fail to recognise the importance of tourism and the value it contributes to employment and economic output. Figure 7 illustrates the value of the tourism industry.

Currently, the tourism sector in the SHOROC region accounts for just over 10,400 jobs, or 10% of total employment. Annual output from the sector is estimated at nearly $2.18b and annual value added is estimated at $1.09b. Value added is annual output less the cost of creating the output so it is net of all costs.

FIGURE 7: THE CONTRIBUTION OF THE TOURISM SECTOR

Table 2 below provides an overview of the net economic benefit of tourism in the region over the period 2008 – 2013.

TABLE 2: OVERVIEW OF NET ECONOMIC BENEFITS OF TOURISM IN THE SHOROC REGION

	2009/10		2010/11		2011/12		2012/13		2013/14	
Measure	SHOROC	% of total industry	SHOROC	% of total industry	SHOROC	% of total industry	SHOROC	% of total industry	SHOROC	% of total industry
Employment (total)										
Direct	6,300	6.0%	5,952	5.6%	6,947	6.6%	7,948	7.5%	7,084	6.8%
Indirect	2,869	2.7%	2,681	2.5%	3,155	3.0%	3,584	3.4%	3,338	3.2%
Total	9,169	8.8%	8,633	8.2%	10,103	9.6%	11,532	10.8%	10,422	10.0%
Employment (FTE)										
Direct	4,664	5.5%	4,581	5.3%	5,080	5.8%	5,506	6.4%	4,919	5.8%
Indirect	3,138	3.7%	3,111	3.6%	3,432	3.9%	3,669	4.2%	3,286	3.9%
Total	7,802	9.2%	7,692	8.8%	8,511	9.7%	9,176	10.6%	8,205	9.6%
Output/Sales										
Direct	$939.0m	3.6%	$891.7m	3.5%	$1.07b	4.1%	$1.16b	4.5%	$1.15b	4.4%
Indirect	$830.2m	3.2%	$782.7m	3.0%	$942.3m	3.6%	$1.03b	4.0%	$1.03b	4.0%
Total	$1.77b	6.9%	$1.67b	6.5%	$2.01b	7.7%	$2.19b	8.5%	$2.18b	8.4%
Value Added										
Direct	$493.5m	4.5%	$466.5m	4.2%	$544.6m	4.9%	$598.3m	5.3%	$593.3m	5.2%
Indirect	$422.0m	3.8%	$403.6m	3.6%	$465.4m	4.2%	$508.8m	4.5%	$499.9m	4.4%
Total	$915.5m	8.3%	$870.2m	7.9%	$1.01b	9.1%	$1.11b	9.8%	$1.09b	9.6%

Table 3 below provides a summary of the percentage of total industry which tourism comprises in the SHOROC region and NSW as a whole. This demonstrates the significance of the tourism sector for SHOROC as follows:

- tourism comprises 10% of total employment in the SHOROC region whereas for NSW as a whole, tourism comprises 7% of total employment;
- tourism output in SHOROC comprises 8.4% of total industry output whereas tourism only comprises 4.5% of total output for NSW; and
- the annual value added for the tourism sector accounts for 9.6% of all value added output in the SHOROC region, whilst for NSW, this figure is only 5.1%.

TABLE 3: SHOROC COMPARED WITH NSW TOURISM INDUSTRY SIZE

Measure	% of total industry SHOROC	% of total industry NSW Total
Employment (total)		
Direct	6.8%	5.1%
Indirect	3.2%	1.9%
Total	10.0%	7.0%
Output/Sales		
Direct	4.4%	2.5%
Indirect	4.0%	2.0%
Total	8.4%	4.5%
Value Added		
Direct	5.2%	2.9%
Indirect	4.4%	2.2%
Total	9.6%	5.1%

5. THE CHALLENGES

The following challenges have been identified through a review of background reports and visitor data and a series of structured interviews with key stakeholders identified by each of SHOROC's member councils. Some of the challenges identified are generic across the Northern Beaches whilst others, as identified, are specific for certain areas. The following are not in priority order.

5.1. Lack of Visitor Yield

The challenge raised by a number of stakeholders relates to a desire to not necessarily increase the number of visitors but to improve the yield per visitor. This is seen as crucial to improve the contribution to the visitor economy and to also gain greater support from SHOROC's member councils and other stakeholders for promotional and other spend for tourism.

5.2. Lack of Connectivity Across the Region

Whilst a variety of initiatives have been undertaken with degrees of success in different parts of the SHOROC region, there is perceived to be a lack of connectivity between each of the Council areas which could be turned into an opportunity for cycle trails, additional expanded walkways, hiking trails, etc.

5.3. Select Locations for National Park Development with Tourism

It would appear that the primary focus, particularly for national parks, is to activate tourism opportunities in the Pittwater LGA as well as around Ku-ring-gai Chase National Park. Whilst having a focus is to be expected, it is important to note that this may delay or defer consideration for other areas controlled by National Parks within the Northern Beaches.

5.4. National Park Resourcing

Whilst National Parks have extensive assets under their control, they have traditionally been challenged with adequate resourcing (equipment, funding, personnel etc.) to take advantage of the growth potential and the visitor economy benefits. Whilst opportunities exist for sustainable commercial players to support the various recreational amenities and trails which have been created throughout the various coastal areas in particular, the regulations and policies governing their introduction are often noted as limiting and difficult to work within.

There is also concern amongst stakeholders that commercial opportunities are often considered an after-thought, making it harder to find suitable operators who can work around pre-determined recreational product options which may not always be so marketable.

We have been chatting with a variety of operators including Taronga Zoo and the operators of Q Station (an area under lease from National Parks), and we note that there has been a product created that offers overnight accommodation at the Roar and Snore tent camp at the Zoo, followed by a coastal trail walk, a ferry link to Q Station and overnight accommodation. We understand that there has been limited market demand for this based on the value proposition and cost.

5.5. Lack of Commercial Accommodation Throughout the Region

Numerous stakeholders (nearly a unanimous response) commented that the lack of commercial accommodation within the SHOROC region was a hindrance towards growing the visitor economy. Most respondents took great care, however, to highlight that what they believed was appropriate were commercial accommodation developments of small-mid scale (40-60 rooms or less) rather than larger style hotels and resorts.

This reluctance to see larger scale accommodation development is because of a perception that the natural environment will be compromised and that the look and feel of larger scale commercial accommodations would not fit with the desires of the community or the image being sort.

In noting the above, many of the stakeholders interviewed were also quick to point out the value recognised in generating local employment, particularly for the younger generation which they recognised the visitor economy could be a primary generator for.

There appears to be a lack of understanding of the size and scale needed for a commercial accommodation facility to be sustainable all year round.

5.6. Community Acceptance of Tourism

A number of stakeholders commented on a reluctance in some communities to promote tourism and growth in the visitor economy. This was perceived to be due to:

- existing traffic congestion and a desire not to actively encourage more;
- inadequate car parking facilities for locals let alone visitors;
- perceived congestion in public recreational areas; and
- a desire to promote the Northern Beaches as an attractive residential enclave rather than actively supporting a visitor economy.

Examples were provided of concerns over growing congestion associated with Council and other privately run events (wine and food festivals, jazz etc.).

5.7. Lack of Sufficient Customers

A variety of retail institutions and other stakeholders noted the challenge for many high street retailers is due to the lack of sufficient local customers to support and sustain businesses. Whilst various large scale shopping centres were noted as highly successful, there was concern expressed that without an adequate number of visitors, many high street retailers and other businesses would struggle to remain commercially viable. This reflects the dichotomy which exists between those coming from a commercial background and their focus on wanting to see greater numbers of active shoppers compared to local residents who perceive more challenges with greater numbers coming into the region and using car spaces etc.

5.8. Political Will

A variety of stakeholders commented on the challenge associated with Councils who are not being actively supportive of the visitor economy and lacking the political will to discuss and debate the benefits of increasing visitation with the community for fear of alienating segments of the community. There is a need to provide elected officials with accurate data to highlight the social and economic benefits which growing a visitor economy can provide and which need to be communicated effectively to the community at large.

5.9. Public Transport Connections

Many stakeholders commented on the lack of effective public transport connectivity throughout the northern beaches. Whilst localised services often worked reasonably well, getting into the Northern Beaches and to various locations generally, through a well-connected service, is lacking. This is seen as particularly important to try and assist the free and independent market who may not necessarily want to come into the area with a rental car and who are potentially more likely to enter if there was good public transport connectivity, particularly between ferry services and buses. The lack of transport connectivity also was seen to encompass private bus services as well as commercial ferry providers.

5.10. Lack of Visible Promotion

Comment was provided about the lack of strong promotional campaigns to attract visitor markets to the Northern Beaches. Stakeholders commented that there were various attractions and sites of interest, including filming locations for television programs such as Home and Away. They also see that the lack of visible promotion ties into the lack of strong brand promotion and lack of awareness.

The Northern Beaches brand was noted by many to be an attractive residential focussed brand rather than one associated with the visitor economy. It was seen primarily as a lifestyle brand synonymous with quality beaches.

5.11. Car Parking Facilities

A universal concern noted is the lack of car parking throughout the Northern Beaches. Many examples were provided on specific locations where lack of car parking is seen as a significant constraint which has also led to a strong reaction from local residents, particularly if they are unable to park within a reasonable proximity from their favourite cafes and restaurants as well as surf clubs, etc.

5.12. Directional and interpretative signage

The region was seen to have very limited wayfinding signage. In addition, there was concern expressed over the quality as well as the lack of interpretative signage. Signage was seen as needed to help promote:

- places of interest and significance;

- to help highlight the heritage and history of the area;
- to provide more detail on walkways, cycle-ways and locations for restaurant precincts, etc.; and
- a lack of online wayfinding tools (mobile apps, etc.) was also seen as a limitation.

5.13. Perceived Short-term Decision Making

Though expressed in a number of ways, many of those interviewed highlighted what they perceived to be as short-term thinking often focussed around small scale activities (i.e. events, development options etc.). There was a concern expressed about a lack of longer-term strategic thinking and, in addition, a perceived desire to avoid consideration of medium or larger scale activities which may generate far stronger economic related benefits. Councils were seen to be highly successful at activating smaller scale activities and smaller scale street level promotions but these were not necessarily seen to have any noticeable, tangible impact on encouraging greater visitation or stronger community involvement.

5.14. Resourcing of SHOROC

A variety of stakeholders commented that SHOROC needed to be better resourced, particularly to support stronger promotional activity for the region. There was a general consensus that if SHOROC was able to be provided with a larger promotional focussed budget, its ability to leverage greater resources from other parties could be achieved.

5.15. A Disjointed Region

Many stakeholders commented that whilst there were some excellent initiatives undertaken on a Council level, the Northern Beaches were seen to be fairly disjointed in trying to achieve collective responses to opportunities. Feedback highlighted:

- a concern that Mosman, whilst being a highly attractive and successful retail area and having strong coastal recreational areas, as well as Taronga Zoo, it is not perceived as a gateway into the Northern Beaches but needed to be better integrated;
- Manly is recognised as the iconic inbound visitor hub for the area but there appears to be a lack of connectivity between Manly-based experiences and opportunities and the ability to spread these more widely throughout the Northern Beaches to add to the value of experiences in Manly;
- Warringah was seen to have a number of areas which could be activated but, to achieve this, they would need a far stronger focus on the visitor economy, engaging with commercial operators and developers; and
- Pittwater was seen to be highly and successfully aligned with national parks and nature-based experiences. However, many felt it was fighting a rear guard action from residents who are not interested in seeing growth in the visitor economy for fear of greater traffic and parking congestion, in particular, than was currently being experienced. There was also concern that in-spite of efforts very limited commercial benefit had been generated.

In noting these points, it is important to highlight that these were not provided as any form of criticism against any one Council but rather the inability to effectively marry the various Council areas into a cohesive visitor destination with unique elements.

Overall, there appears to be some frustration in the inability to drive sufficient commercial activity to grow the visitor economy and a perceived preference to focus on "nice community friendly" recreational amenities.

5.16. Activating the Surf Clubs

It is noted there are 21 surf clubs between Manly and Northern Palm Beach which have over 19,300 members. Whilst many of the surf clubs desire to introduce revenue making opportunities, there is also a desire to avoid following what many saw as the Queensland surf club model (associated with restaurants, poky machines, etc.). It is noted that, at times, there has been strong, local community opposition to any commercial development off some of the surf clubs. An example, in point, was the Long Reef redevelopment proposal which the community opposed but the Council was keen to support.

The surf clubs are seen by most stakeholders as a wonderful resource for the region with opportunities to develop seasonal food and beverage outlets, if nothing else. It is noted that the Avalon Surf Club has recently engaged a professional catering firm who have put in a restaurant and this is seen by many as a test case to see if it can be sustained all year round.

5.17. Seasonality

Many examples were provided of retailers, restaurants, etc. finding it very challenging particularly in beach areas because of seasonal visitor trends. The closure of Ripples Restaurant at Whale Beach and the modification of the restaurant at Whale Beach Surf Club to a function venue were just a few examples of where the viability of all year operations were questionable.

There are challenges having businesses unable to sustain themselves over low seasons in particular and an inability, at times, to generate sufficient return over peak periods to cover this short fall.

5.18. Tour Operators

Discussions with tour operators indicated concerns relating to traffic congestion and parking. General comment was that traffic congestion has significantly worsened over the last 3-5 years making it more difficult to bring tour groups, particularly from the CBD, into the Northern Beaches. Coupled with this is the challenge of getting car parks or small shuttle bus/coach parks at key locations for sightseeing and a perceived lack of interest from Councils to introduce dedicated parking for mini buses, etc. to help alleviate the problem.

5.19. Indigenous Tourism Activation

Tour operators commented that it was only the international market who appeared sufficiently interested in indigenous tour product. Whilst it was recognised that the Northern Beaches had a number of important and accessible sites relating to indigenous communities and sites of significance, there were concerns expressed over:

- the traffic congestion and lack of parking bringing groups from the Sydney CBD;
- the lack of interpretative signage to add value to the experience; and
- the lack of packaging generally of visitor experiences and attractions within the Northern Beaches.

5.20. Where is the Gateway?

Whilst Mosman is seen as the first Council area coming into the Northern Beaches, many stakeholders commented that it does not feel like a natural gateway and it does not feel to have a close association with the Northern Beaches generally. By comparison, Manly was noted by a number of stakeholders as a more logical gateway for the Northern Beaches, partly due to its look and feel, the product on offer and the stronger connection to Warringah and Pittwater.

5.21. Inventory Data

Stakeholders noted a lack of inventory of tourism attractions and accommodation facilities in the region to indicate the number of accommodation rooms, their quality and to understand the number in each establishment.

An inventory was seen as highly useful to also help sell the region to inbound tour operators and others to reflect the number of visitor attractions and experiences, the number of restaurants, and other assets which may be of interest.

5.22. Visitor Statistics

Stakeholders commented that the official visitor statistics provided by Sate Government (DNSW) are not reflective of estimated visitor numbers. By way of example, DNSW indicates that visitation of approximately 2.1m (overnight) into Manly and includes those coming for holiday and leisure, business and those visiting friends and relatives. Feedback indicates that the more accurate figure is probably closer to 4m, also excluding day visitors.

The lack of an accurate and agreed statistical database makes it difficult to show historic trends and to allow for the development of visitor forecasts. Without a robust evidence base, it also makes it particularly difficult to attract funding from a variety of government agencies and other sources.

5.23. Size of Industry Operators

Feedback from a number of stakeholders indicated that the commercial sector overall comprised a very high percentage of small business operators and owners (micro and small businesses) within the Northern Beaches and relatively few medium or larger players, particularly in tourism. This was seen to be problematic with smaller businesses finding seasonality particularly difficult to operate within and with the inability at times to be flexible enough to react to new opportunities.

This is also correlated to the tourism employment challenges which many saw for the region with lack of ability to take on apprentices, lack of ongoing staff training and lack of succession planning particularly affecting the longevity of many businesses.

Examples were provided of eco-tourism operators in particular finding it particularly challenging because of the highly seasonal nature of their business and the necessity at times to undertake other ventures because of the inability to operate all year round.

5.24. Public Sector Transport Capacity

A lack of sufficiently strong working relationships was noted between bus and ferry providers and those trying to coordinate a variety of events and festivals. By way of example, the recent Jazz Festival in Manly was estimated to have encouraged 117,000 attendees which was advised as a 150% increase on numbers three years ago. Despite discussions with transport providers, the waiting time to get onto ferries at Circular Quay was estimated at 2-3 hours. Understandably, this generated a number of negative responses and complaints from people who had bought tickets to attend various activities.

5.25. Understanding the Current Visitor Markets

A lack of shared and publicly available information on visitation trends and market segmentation was seen as a problem by a number of stakeholders. Point of relevance included:

- 30-40% of weekend visitors to a number of major events was seen as coming from the Northern Beaches, and therefore, are considered locals rather than "true visitors". The importance of the local market (those residing within 25 km of an event) was not generally well understood or factored inot visitor estimates;
- very limited statistical information on visitor trends - a system is needed to record this appropriately;
- a strong UK market, particularly to Pittwater to areas where Home and Away is filmed. There are likely to be opportunities to grow beyond this market but insufficient information seems to be available on visitor trends;
- Despite the significant growth in various Asian markets into Sydney, it is noted that the Northern Beaches secure low numbers. There is concern that when the European, UK and North American markets as well at South American markets consolidate and reduce, the lack of effort in attracting Asian visitor markets will make it particularly challenging for many traditional and non-traditional tourism operators including general retailers to fill the gap. And there are products already in the Northern Beaches which will appeal to various higher spending Asian visitor markets.

6. THE OPPORTUNITIES

The following are the various opportunities identified through the research and interviews undertaken. It is important to note that these opportunities are more generic in nature and have not been tested. That is, as part of this top line Opportunities Paper, they reflect the views of various stakeholders and the opportunities, as identified, through the research studies and other reports provided to the Group including our initial top line analysis.

6.1. Natural Assets

The Northern Beaches are rich in natural assets available. These assets include areas such as North Head, the facilities at the Q Station, the various coastal walkways and waterfront areas for kayaking etc., Ku-ring-gai Chase National Park and the various calm water areas of Pittwater amongst others.

Whilst many of these are noted as attractive and accessible natural assets, they need to have various forms of infrastructure and product to *take them from being natural assets to being natural attractions*. Being attractions, there are opportunities to generate revenue and employment as well as supporting a variety of indirect businesses and suppliers of goods and services. All of this is able to be undertaken through a highly sustainable approach which could focus on yield rather than visitor numbers.

To achieve this transition from asset to attraction however, is likely to require the creation of partnership opportunities where land holders may not have the capital to create the infrastructure and product required, whilst commercial experienced parties may be able to provide this.

We understand that there are a variety of National Park experiences where commercial operators are established and where Councils such as Pittwater are actively encouraging new multi-day experiences where the natural assets become the backdrop and drawcard for helping to provide active and passive visitor experiences.

The challenge for the Northern Beaches however is that many parts of the coastline around Sydney and into the Central Coast and South Coast are highly attractive and accessible. There is intense competition therefore to grow inter-state, intra state and international visitor markets, especially those higher yielding – spending markets.

6.2. Coastal Walking Trails

The work which has been done to date with the development of walking trails around Narrabeen Lake as well as some of the Coastal walkways generate very positive feedback from stakeholders. They are seen as highly important and valuable for a local recreational market as well as potential visitors. The opportunity to link various trails, however, is seen as a much wider opportunity and something which could bind the various Council areas together and offer more commercial tour options.

In addition to the quality of walking trails is the need to consider high quality interpretative signage (which could be via a mobile app or other form of online information rather than necessarily having signage boards).

Whilst walkways are a very important form of infrastructure support, consideration, where appropriate, should be given to locations where small popup cafes can be provided, particularly during the peak period/holiday seasons to support walking and cycling experiences. Ways of enhancing a passive experience need to be considered and which can also actively encourage movement between the various Council areas where trails can link.

6.3. Use of Ferry Services

The challenge noted by many with traffic congestion, is seen as an ongoing problem. A major asset is the various ferry services across from Circular Quay to Manly and into other parts of the Northern Beaches as well. Offering the visitor markets (as well as local commuters) a number of ferry service options probably on a seasonal basis is something worthy of investigation. Attractiveness of the coastline, the existence already of a number of jetties and wharfs and the desire by many visitor markets to travel on water rather than on congested roads should be considered.

Potential may also exist to offer clever interpretation of history and heritage sites as well as elements of indigenous tourism as visitors use different forms of ferry travel to access locations in the Northern Beaches.

6.4. Brand Association

The Northern Beaches, as a brand, we suspect is well known in the Greater Sydney region. It is probably recognised as a lifestyle brand reflecting the quality of liveability for those residing in the Northern Beaches. As previously identified, a number of stakeholders felt that the southern anchor for the Northern Beaches brand was Manly and the northern anchor was North Palm Beach (Pittwater). Mosman was not seen to have the characteristics which other parts of the Northern Beaches displayed.

Consideration needs to be given to pulling together the story of the Northern Beaches so that brand is reinforced not merely as a lifestyle brand but as a highly attractive destination where people live, work and play. It may need to include a variety of taglines which reflect the uniqueness of the various elements of the region rather than trying to come up with one name or tagline which can apply to everything.

A branding exercise should be part of any future destination management plan or similar strategy created for the Northern Beaches to support a variety of marketing initiatives. In a practical sense, the brand needs to actively help in:

- Linking the various precincts and hubs which offers services and facilities throughout the Northern Beaches;

- A brand which can link the beaches and support a variety of walking tracks and cycle ways throughout the region;
- Finding ways to link in Mosman more strongly; and
- Which can support the promotion of various cross-Council events, programs and initiatives of with a destination focus.

6.5. Expanded Car Parking Facilities

Finding additional capacity for car parking to meet current community and visitor needs, let alone any increase, is required. A transport planning study focussed on improving car parking facilities in various key coastal locations particularly needs to be considered. *It may be that car parking facilities can be managed differently to allow for better utilisation rather than increasing capacity.*

6.6. Community Lifestyle and Recreational Needs

As advised by nearly all stakeholders, there is clearly a strong nimby feeling in many areas in the Northern Beaches. Communities are nervous about growth in tourism for fear that this will impinge on their quality of life etc.

Analysis is required to illustrate to local communities that the benefits of the visitor economy in employment generation, new investment and improved sustainability of local businesses can be achieved without compromising liveability.

6.7. Supporting Water-based Infrastructure

Consideration needs to be given to introducing elements of infrastructure such as pontoons for recreational use in various locations where there is calm water particularly. Stakeholder feedback indicates Pittwater's calm water assets are significantly under-leveraged as a major attraction.

The opportunity for introducing pontoons (in similar fashion to Redleaf Pool in Woollahra) with supporting seasonal café facilities could be considered in various coastal locations which are safe and easy to access. The opportunity is also seen in the growth potential in sea kayaking and calm water kayaking, in sailing as well as recreational fishing.

Stakeholders recognise the success of various infrastructure such as the walking trail around Narrabeen Lake but with the need to add additional elements to maximise recreational and visitor use and achieve improved visitor spend.

6.8. Overnight Accommodation Facilities

Whilst stakeholders are not keen to support a larger scale hotel/resort facilities, there is interest for additional boutique to medium sized accommodation. Indicators are that accommodation, possibly up to 40-60 rooms is seen as a size which may befit the Northern Beaches style of facilities and look and feel.

Whilst a number of people commented on the Air B&B opportunity, there was additional comment to reflect that whilst B&Bs were important in offering regional accommodation, they were not able to adequately draw a small conference market into the region and, in particular, the MICE market.

Stakeholders commented that the region is a community-driven peninsular which has a strong local (Sydney) market focus. Overall, additional accommodation is seen as important to widen the benefits of the visitor economy, to stimulate new employment opportunities, particularly for younger people living in the Northern Beaches and to grow higher yielding niche markets.

Greater emphasis on higher quality product which improves visitor yield is seen as preferred.

6.9. Surf Clubs

With over 21 surf clubs between Manly and North Palm Beach, there is opportunity seen to better utilise this important resource where the surf club buildings are primarily owned by Councils. The more recent example of the restaurant being positioned at the Avalon Surf Club was an example mentioned by some stakeholders as a model which could be emulated in other surf club locations.

In wanting to see better utilisation surf club facilities and development of appropriate revenue streams, it was also noted that there was local community opposition to surf clubs becoming registered clubs and to allowing them to establish different forms of facilities in similar fashion to the larger surf clubs seen in Queensland.

It was also noted that the surf clubs provided important data to assess utilisation of beaches in the region through lifesaver patrols estimating how many people are on the beach at any one time. Whilst the current estimates for the Northern Beaches indicate approximately 3m beach goers per year, this figure is thought by lifesaving NSW to be underestimated by 30-40 percent. It is this ready market of locals and visitors who are seen to be able to support (on a seasonal basis) potential popup food and beverage outlets within surf clubs.

Some stakeholders also commented on the need to look at developing surf related product including surfing lessons and to actively promote for corporate team building and family activity.

6.10. The Conference and Meetings Market

The desire of stakeholders to avoid any activity or infrastructure of a significant size is well noted. However, a number of stakeholders commented on the need to attract a high yielding visitor market, and particular niches which stood out included small scale conferences, meetings and attracting the MICE market.

Other than some facilities at Manly associated with larger hotels, the region was seen to be lacking in higher quality conferencing facilities. The location for a higher quality conferencing venue needs to be carefully determined, although a number of stakeholders commented that it may more appropriately be located in Manly because of the existing tourism infrastructure to leverage off.

6.11. Night Time Activity

Whilst there is a heavy outdoor focus for visitor activity within the Northern Beaches, stakeholders also identified the need for more night time events and other activations. Consideration could be given to a variety of smaller scale night time events and festivals, particularly in shoulder and low seasons where family friendly activities may be able to support a number of existing retail and tourism businesses.

There was a concern by a number of stakeholders that the heavy focus purely on outdoor activity and over a seasonal period (spring-summer months) was very limiting for the visitor economy into the Northern Beaches.

6.12. Popup Facilities

Whilst there is great sensitivity about allowing various forms of tourism infrastructure to be established in the Northern Beaches by some stakeholders, consideration needs to be considered to allowing popup/temporary facilities to support existing infrastructure such as cycle-ways, walkways and on-water activity. Small scale popup cafes and the introduction of popup facilities for night time activations should be considered. Furthermore, where permanent facilities may be harder to develop due to the level of seasonality, pop up alternatives can offer an interim solution until such time that a permanent structure is seen as desirable and commercially viable.

In addition, outdoor cinema experiences and other smaller scale performances should also contemplated in various locations which can be more easily controlled and monitored.

6.13. Destination Awareness

The Northern Beaches is seen to be under-marketed as a location for locals (Sydney regional residents) and broader visitor markets. A destination awareness campaign which initially may need to focus on a variety of attractive outdoor areas, (the walkways, cycle-ways, waterways, headland lookouts etc.) should probably provide the focus for this. It is noted that whilst there are capacity issues creeping in for some of the major events (Manly Jazz Festival), greater awareness of the high quality national landscape projects needs stronger promotion once these are able to be packaged with opportunities for dining, retailing and possibly events.

Destination awareness also needs to be promoted online as well as through other forms of marketing collateral. A local Sydney regional market is seen as an important market who already has an understanding of the lifestyle benefits of the Northern Beaches but is probably unaware of the various upgrades and improvements to infrastructure including new walkways, etc. which the Northern Beaches have introduced in the last few years. As part of this, there is also the opportunity to push the VFR market, noting that many people in Greater Sydney and elsewhere have friends and relatives residing in the Northern Beaches. Though they may stay with local families, they will often dine in cafes, attend events and festivals, buy retail goods as well as undertake tours and activities.

6.14. Potential for Visitor Precincts and Hubs

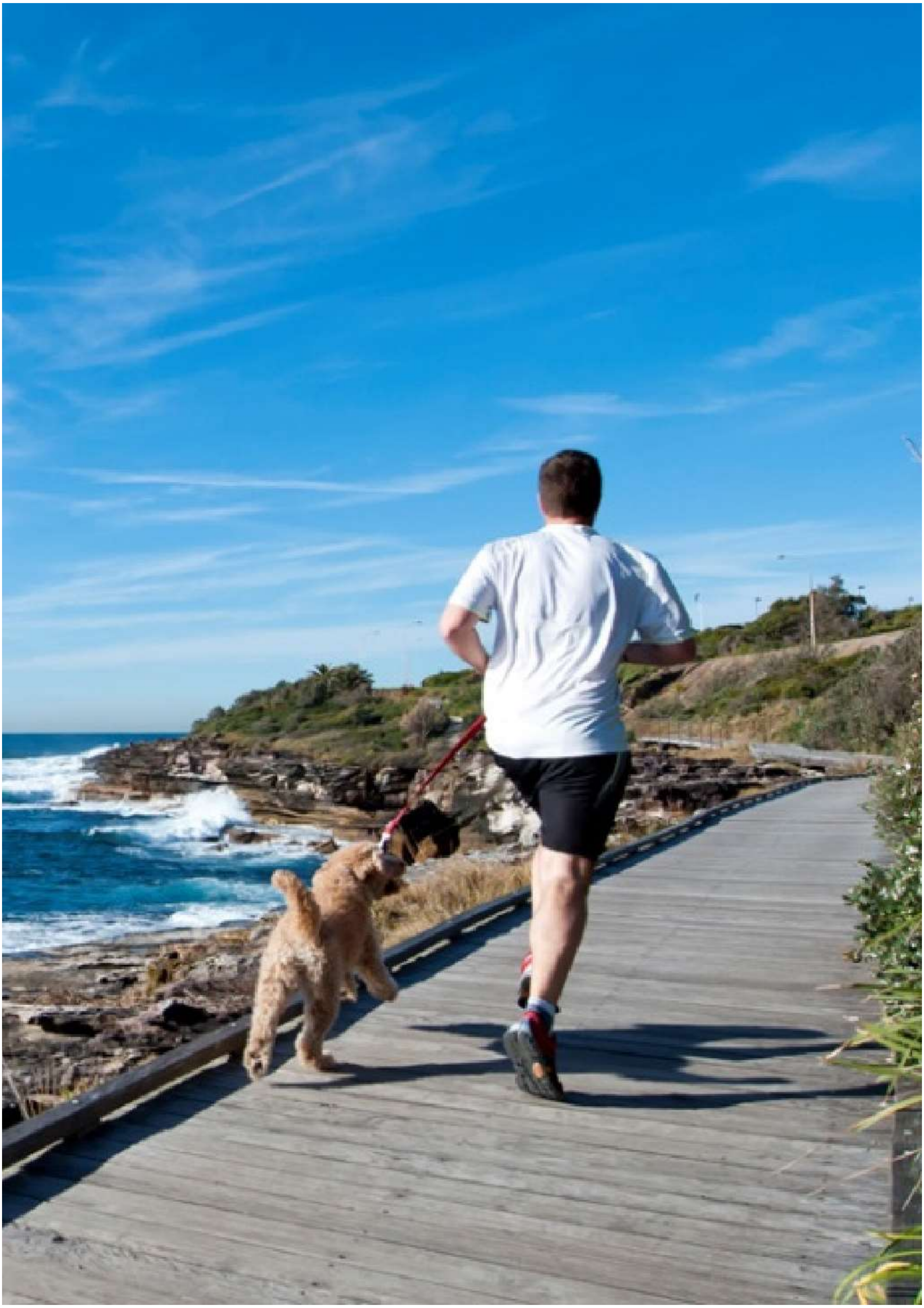
Currently, many stakeholders noted the strong preference of local residents within the Northern Beaches to limit growth in tourism for fear that it would overrun the quality of recreation and lifestyle experiences which they have as residents. Research and analysis needs to be undertaken to identify possibilities for focusing visitor activity into precincts, hubs and nodes so that it can be better controlled and managed and can avoid potential conflict with local communities.

For example, Manly was noted by most stakeholders as a key tourism location and an icon for inbound visitors to Australia. Pittwater and the link to where Home and Away was filmed was seen as an important node particularly for the UK market but which needed to be expanded.

Whilst Manly and Pittwater may potentially offer the southern and northern anchors for a possible strategy for the visitor economy in the Northern Beaches, the greater promotion and use of walking trails, cycling trails, water based trails and links to restaurant and other precincts need to be factored in to stimulate greater benefits throughout the region.

A strategy which potentially focusses visitor activity into specific areas and encourages greater utilisation of Council and national park investment into walkways, etc. may need to be considered.

Tourism development often works better when facilities and operators are able to be clustered together. This allows them to leverage off one another and can lead to joint products and improved packaging. It also provides greater certainty for operators, developers and investors who may want to establish in the area.



7. NEXT STEPS

This Visitor Economy Opportunities Paper has highlighted a variety of opportunities and challenges if the visitor economy is to be grown in the Northern Beaches on a sustainable basis. Whilst there are a number of excellent initiatives which have grown recreational use of outdoor areas often controlled by National Parks and Council, these have not yet been seen to be able to generate sufficient revenue or commercial returns.

The economic benefits which can be accrued from visitor economy activity is something which needs to be further developed and expanded within the region. The greater the returns able to be seen by local communities, with the ability to protect and sustain natural assets and the environment, the better the chance of changing community attitudes as local businesses are able to flourish and grow local employment.

Next steps which SHOROC and its constituent Councils should consider include the following.

- Undertaking a detailed inventory of tourism attractions, accommodation facilities and other assets. There is a need to identify and promote all visitor economy related assets for the benefit of the local market as well as broader visitor markets. The development of an inventory could link to an audit of quality ratings. There is concern by a number of stakeholders that there is insufficient higher quality attractions and facilities to support a higher spending visitor market in particular so quantifying what exists is valuable.
- Stakeholder consultation highlighted a desire to encourage fewer visitors but spending far more and increasing length of visitor stay. Consideration needs to be given to developing a strategy which actively encourages a higher spending visitor market tagged to improve visitor yield within the Northern Beaches. Once again, the ability to be able to show Councils and local community that the visitor economy is able to generate strong and valuable economic benefits which accrue locally is an important consideration.
- Research and analysis is needed to develop a robust visitor database. Current visitation statistics (provided primarily by State Government as well as from a review of ticketing information on ferries etc.) is seen by many to underestimate visitor numbers. Having a robust and accurate series of visitor data is an important consideration to help encourage different forms of tourism development and investment and to actively encourage specific promotional initiatives for different visitor markets.
- The Northern Beaches needs to decide the type of visitor markets it wishes to actively encourage. It then needs to develop various promotional campaigns which are carefully and cleverly targeted to achieve this.
- An assessment is needed on the viability of having visitor activity into select precincts and nodes. That is, there may be benefit in strengthening a number of locations to better cater to visitor markets and

which limit potential conflict with local communities. A destination management plan would be a useful tool to support where tourism development and investment and marketing initiatives should ideally be focussed. It would provide a useful road map for the region. Destination NSW and other State Government agencies are also more likely to support various initiatives and help with active promotion where there is a destination management plan for the region.

- Consideration also needs to be given to assisting the vast bulk of tourism and related retail businesses which are micro and small business operators in the region. An assessment of training and upskilling needs, identifying and filling employment gaps are initiatives which would not only benefit those businesses involved in the tourism sector but a significant number of other small business operators within the Northern Beaches. Feedback indicates that many small businesses find it difficult to operate because of the highly seasonal nature of the visitor economy but don't have the flexibility, resources or capital to grow and expand quickly when stronger periods of visitor growth occur.
- Whilst there are some excellent initiatives which the various Councils undertake with State Government transport related agencies, there is a need to strengthen the understanding of bus and ferry operators to better cope with influxes of visitors in particular during major events and during peak visitation periods. A strategy which actively supports greater use of water-based transport for the Northern Beaches needs to be assessed. It is likely to be exceedingly difficult to adequately address road transport peak time congestion issues although we understand that SHOROC is involved in a bus rapid transit system to try and alleviate existing road congestion into and around the Northern Beaches.
- Consideration needs to be given to developing a visitors' services strategy which can better integrate the needs of locals and visitors throughout the Northern Beaches. Whilst the Visitor Information Centre in Manly supports queries in Manly, its focus is clearly about keeping people in Manly rather than spreading these to other parts of the Northern Beaches. An integrated strategy which actively encourages visitors to consider different parts of the Northern Beaches needs to be considered, including online visitor information services and other initiatives such as popup visitor information support during major events and in key nodes during peak periods over summer.

SHOROC need to advocate for actively promoting the benefits which an expanded visitor economy is able to generate, particularly to support:

- sustainable visitor growth tagged with improved visitor yield;
- expanded investment into select areas to support and grow the visitor economy; and
- generating additional full-time, part-time and contract employment opportunities, which locals can benefit from.

Finally, there is a need to develop an evidence base, through a variety of studies and strategies to support greater interest from local communities for the visitor economy and to see it less of a threat and more of an opportunity.

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ITEM 4.3	**CREATING FAIR PROCUREMENT OPPORTUNITIES FOR NORTHERN BEACHES BUSINESSES**
REPORTING OFFICER	**EXECUTIVE MANAGER PROCUREMENT**
TRIM FILE REF	**2018/198864**
ATTACHMENTS	**1 ⇩Procurement Policy**

northern beaches council

Council Policy

Procurement

Policy Statement

This policy provides the framework for Northern Beaches Council to achieve value for money from their procurement whilst being fair, ethical and transparent.

Principles

The following principles will guide all procurement activities.

Value for Money

Obtaining value for money in delivering the best outcomes for our community is the overarching requirement for procurement at the Northern Beaches Council. Value for money is not necessarily the lowest price; it includes consideration of many factors including quality, performance history, whole of life costing - including the cost of environmentally responsible disposal at end of life, timely delivery, risk and WHS requirements.

Ethics and Probity

Council procurement involves the expenditure of public funds for community benefit and is governed by strict considerations of probity, transparency and accountability to ensure that the decision making processes withstands public scrutiny. All staff must adhere to high standards of probity in procurement, uphold high standards of integrity and fairness and undertake their duties in accordance with Councils Statement of Business Ethics and Code of Conduct.

Equity

Procurement processes are developed to ensure that suppliers are provided equal opportunity to contract with Council in the provision of works, goods and services.

Environmental Sustainability

Council will promote high-quality environmental standards and responsibility and make procurement decisions which aim to reduce resource consumption, biodiversity depletion and environmental impact where possible. The entire life cycle of goods and services are to be considered, taking environmental risks and benefits into account whilst avoiding unnecessary consumption - for example inputs of natural resources, energy and water in the manufacture, use and disposal of goods

Social Sustainability and Local Supplier Engagement:

Council is committed to assisting local businesses in working with Council and will ensure that its processes are transparent and do not disadvantage local business. Certain circumstances may present opportunities to generate social value through the procurement processes, these opportunities will be pursued where applicable to generate positive outcomes and benefits for the people and communities that Council serves.

Compliance

Council has a legislative requirement under the Act to tender for works, goods and services where expenditure for the life of the contract is greater than $150,000 (including GST). Procurement is also undertaken in accordance with the Tendering Guidelines for NSW Local Government and the NSW Code of Practice for Procurement.

A Robust Procurement Framework

A policy, operational processes, manuals and templates which provide guidance in achieving the best value for money delivery of quality services to our community. To the extent possible, procurement processes will be kept simple so as to maximise efficiency and reduce costs.

Key components of the framework are:

- *Financial Thresholds* which define the procurement processes for different levels of expenditure. Processes to be followed for values below the $150,000 tender threshold prescribed in the Act are detailed in operational guidelines and the procurement manual.
- *Financial Delegations* which define the levels of authority that specified staff have to approve contracts and payments. Prior to the commencement of any procurement process:
    I. Funds must exist within an approved budget; and
    II. The appropriate financial delegate must be aware of the procurement.

Breach of Policy

All procurement activity must be conducted in accordance with this policy and the associated procurement framework. Failure to comply may result in disciplinary or legal action. The Independent Commission Against Corruption (ICAC) has been established to protect the public interest, prevent breaches of public trust and guide the conduct of public officials. Council has an obligation to report serious matters to the ICAC and/or Police which potentially could result in civil or criminal proceedings.

Scope & Application

This policy applies to all employees, agents and officers of Northern Beaches Council, along with all Councillors.

References and related documents

- Section 55 Local Government Act 1993 (NSW)
- Part 7 Local Government (General) Regulation 2005 (NSW)
- DLG Tendering Guidelines for NSW Local Government
- Northern Beaches Council Statement of Business Ethics – 2016
- NSW Code of Practice for Procurement 2013
- Northern Beaches Council Procurement Manual and associated templates

Definitions

The Act: Section 55 Local Government Act 1993 (NSW)

Regulations: Part 7 Local Government (General) Regulation 2005 (NSW)

Probity: Ethical behaviour that upholds the values of honesty and integrity and ensures impartiality, accountability and transparency

Procurement: the overarching business function of acquiring goods and services; the end to end process of identification, sourcing, market engagement, evaluation, contract award, contract management and review.

Goods and Services: where Goods and Services are referred to in this policy, it is also applicable for Works, Consultancies and Lease agreements.

Responsible Officer

Manager Procurement

Review Date

May 2021

Revision History

Revision	Date	Change	HPE CM Ref
1	25/7/2017	Policy adopted by Council with no changes following exhibition	2017/124289

ITEM 4.4	**DEVELOPING BUSINESS PARTNERSHIPS AND NETWORKS - BUSINESS CHAMBERS OF COMMERCE**
REPORTING OFFICER	**ECONOMIC DEVELOPMENT COORDINATOR**
TRIM FILE REF	**2018/198969**
ATTACHMENTS	**NIL**

ITEM 4.5	**GENERAL DISCUSSION**
REPORTING OFFICER	**EXECUTIVE MANAGER COMMUNITY ENGAGEMENT & COMMUNICATIONS**
TRIM FILE REF	**2018/200354**
ATTACHMENTS	**NIL**

Items for discussion include:

- Opportunities for Council to make it easier for business
    - Role of Council and State Government
    - Cutting red tape for business
    - Improving planning in commercial/industrial zones