



NORTH SYDNEY VISITOR ECONOMY STRATEGY

2019/20-2024/25

Jason Busch - Wendy Whiteley's Secret Garden



North Sydney Council - North Sydney CBD



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INTRODUCTION



North Sydney Council - Welcome to North Sydney Sign

The North Sydney Visitor Economy Strategy (the Strategy) provides the strategic direction to guide the growth of a sustainable visitor economy for the future of the North Sydney Local Government Area (LGA).

The Strategy results from priorities identified within the *North Sydney Community Strategic Plan 2018 - 2028*. It will also contribute to delivering on Council's responsibilities identified within the Greater Sydney Commission's *North District Plan*. Funding has been provided by the NSW Department of Planning, Industry and Environment, under the Accelerated LEP Review Grant.

The Strategy has been informed by:

- a review of existing plans and strategies;
- a situation analysis, including:
 - review of visitor research for North Sydney LGA; and
 - insights from relevant global and domestic trends in travel and tourism;
- insights from an online product and experience audit; and
- stakeholder consultation.

The appendices include a review of existing Council plans and strategies, the situation analysis, the product and experience audit and stakeholder consultation.

The Strategy carefully considers the balance between conservation and sustainability with the desire to strengthen the economy, providing employment opportunities for generations to come. As part of this approach, the Strategy aims to leverage North Sydney's existing strengths and focus on those markets with the greatest propensity for potential growth.

The Strategy identifies the long-term vision and actions required to develop North Sydney's visitor economy, based on the following high-level objectives:

- Attracting the right markets for North Sydney; and
- Creating vibrant communities and world-class visitor experiences.

Attracting the right markets for North Sydney addresses demand, and includes:

- destination positioning; and
- utilising contemporary marketing models to promote the destination, while reflecting and leveraging the values, aspirations and ambition of the local community.

Creating vibrant communities and world-class visitor experiences addresses supply, and includes:

- identifying and prioritising investment in visitor experiences, infrastructure and partnerships within and across sectors and industries, taking into consideration issues such as availability of resources, viability of businesses and any constraints (timing or capacity) on investment attraction; and
- identifying enablers that facilitate implementation of the Strategy's priorities, such as the regulatory and policy framework through to opportunities for ongoing industry and community engagement.

The Strategy also includes a 'destination positioning statement', which is intended to inform the future marketing of the LGA, plus the following cross-cutting themes:

- Connected Community;
- Living Heritage;
- Dynamic Centres.

The Strategy is supported by a prioritised Action Plan, (see Section 5.), which includes the actions, performance measures, responsible departments and timeframe for delivering the objectives.

In order to prioritise the Strategy's Action Plan, a set of criteria was developed:

- opportunities to deliver the greatest return on investment, addressing both supply and demand as well as encouraging investment in infrastructure and services;
- integration with other strategies and plans relating to the North Sydney LGA;
- best fit with available resources;
- aspirations of North Sydney's community, as identified through the consultation process; and
- opportunities for partnerships and collaboration between the Council and industry.

Collaboration between Council, businesses and the community will ultimately underpin success. The Strategy is more than just a plan for Council. It identifies opportunities across sectors and industries, including strengthening partnerships with agencies of the State and Federal Governments as well as community groups.

1. SETTING THE STRATEGIC DIRECTIONS



Jason Busch - Peter Kingston Walkway

The review of existing Council plans and strategies, situation analysis and stakeholder consultation (see appendices) have informed the Strategy's vision, positioning statement and strategic framework. These elements form the foundations of the Strategy and assist in prioritising the Action Plan (see Section 5) to guide the Council's approach to growing a sustainable visitor economy for the future of the North Sydney LGA.

1.1. STRATEGIC FRAMEWORK

The vision and positioning statement provide the framework to guide the strategic direction of the destination.

Vision for North Sydney's Visitor Economy

.....

To grow a sustainable visitor economy that contributes to the vibrancy of our community, protects our environment and supports dynamic centres, positioning North Sydney as a world-class place to live, work, study and visit.

.....

1.2. POSITIONING STATEMENT

A primary concern raised through consultation was the need for a more clearly-defined identity for North Sydney. While this is best established through the creation of a place brand for the LGA, a 'destination positioning statement' assists in communicating the values of the destination and informs the strategic framework. While aspirational, it provides an emotional territory for the North Sydney LGA to own in the hearts and minds of its community, guests and visitors.

A positioning statement should be aspirational, invitational and based on consumer insights. Importantly, it should resonate with target markets.

A positioning statement isn't a tag-line or advertisement for the destination. It plays a more fundamental role in helping to describe the essence of the destination, capturing its emotional territory and reflecting the promise of the place.

The positioning statement for North Sydney reinforces the competitive advantages of North Sydney, including:

- safe and welcoming;
- dynamic and future-focused while respectful of its heritage and environment;
- values: innovation and creativity, whether it is in the arts or industry; and
- vibrant but not brash.

The positioning statement is both invitational and aspirational. It aims to capture hearts and minds. It is not attribute focused (although reinforces the natural attributes of the destination) nor intended as a tag line.

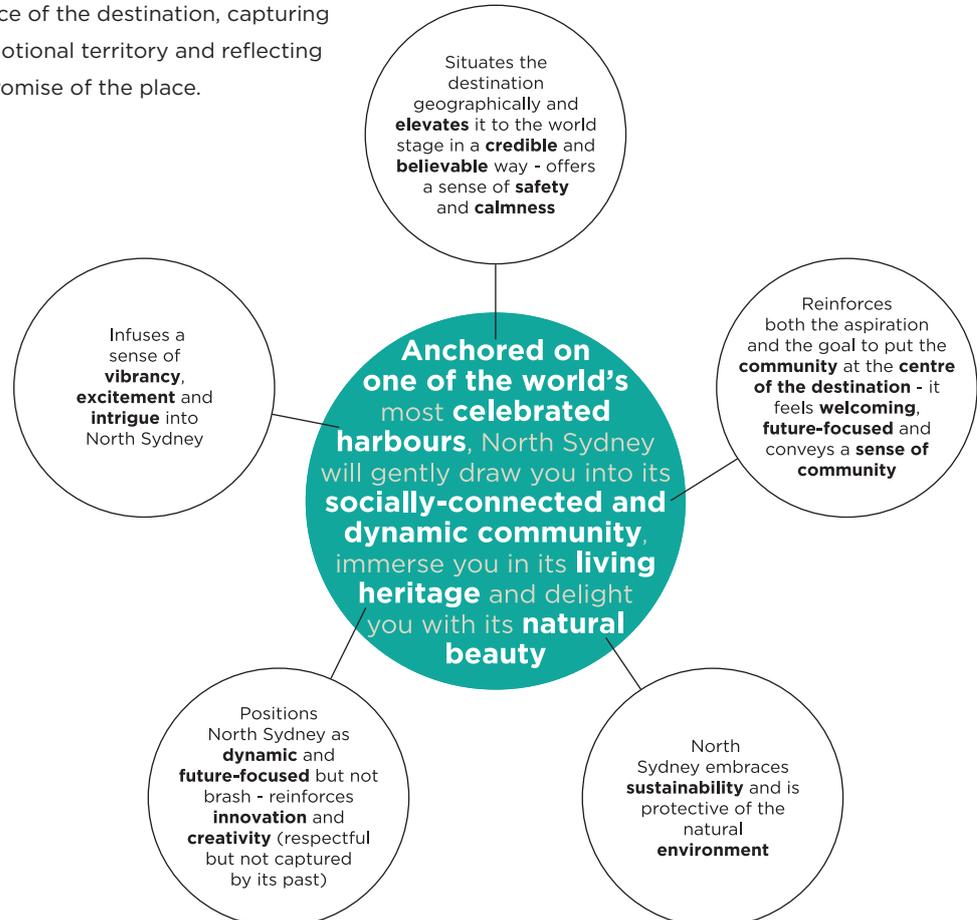


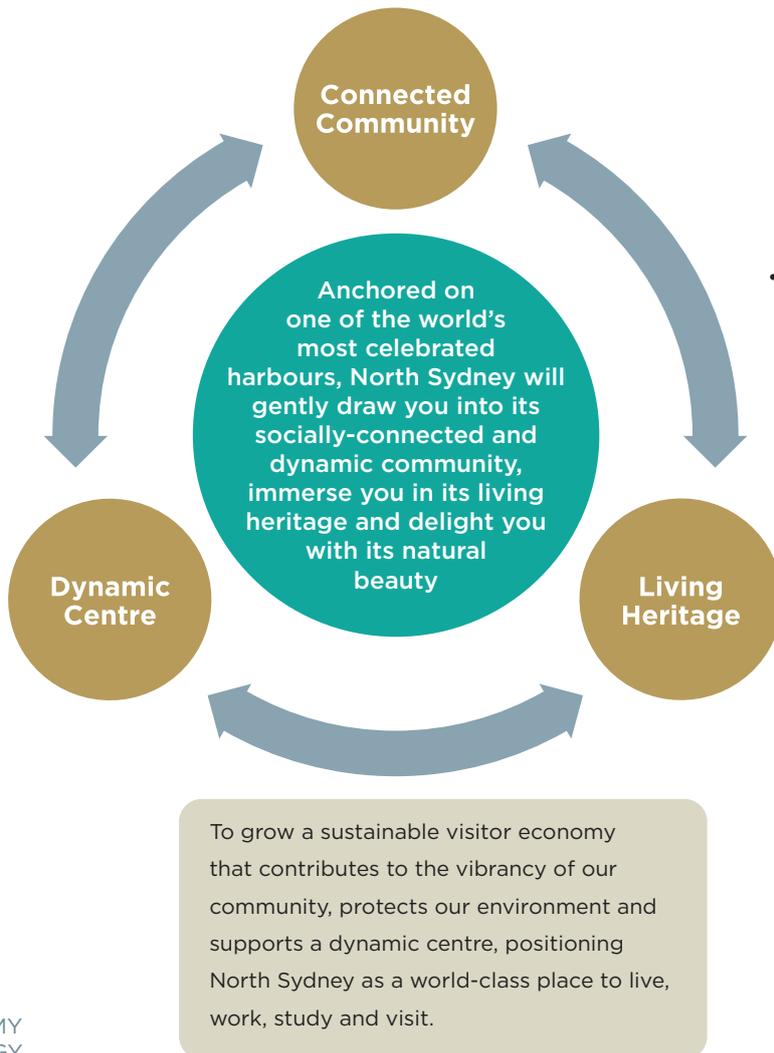
Diagram 1: Destination Positioning Statement for North Sydney

1.3. STRATEGIC THEMES

The Strategy includes the following cross cutting themes: Connected Community, Living Heritage and Dynamic Centres. The themes support the delivery of the high-level objectives, which address demand and supply.

North Sydney LGA offers a diversity of places, attractions and facilities. As a result, it has the opportunity to redefine the visitor experience through leveraging the aspirations of its residents and businesses to create a vibrant and dynamic place to live, work and study. This approach will improve the appeal and perception of North Sydney as a great place to visit.

Diagram 2: Overview of the Strategic Framework



- **Connected Community** – North Sydney LGA offers surprising diversity within close proximity to the Sydney CBD and surrounding areas, including Mosman. To maximise these strengths, connectivity between the places, experiences and activities of the LGA and beyond is critical. This theme involves creating physical and social connections that optimise access within, across and to the LGA. It will aim to showcase North Sydney as a socially-connected and more intimate destination that values sustainability for its community as well as its visitors.
- **Living Heritage** – There is an array of heritage-listed buildings and places of significance throughout the North Sydney LGA. Already, many have been revitalised or adapted for more contemporary use by the community and their visitors. This is a clear strength of the LGA and should be reinforced through activation of those places as well as revitalising other heritage assets to excite and entice generations to come.
- **Dynamic Centres** – Looking back in time, North Sydney CBD was once regarded highly as the alternative, innovative centre to the Sydney CBD. The Sydney Metro and related developments provide an opportunity to reclaim this lost identity and reimagine North Sydney’s CBD as the heart of a future-friendly, innovative and vibrant place that easily blends business with leisure. Essential to this will be to look at ways of presenting a different side to Sydney, taking pride in a point of difference, developing a new and more boutique offering and delivering activations that are more suited to a dynamic and evolving business world. The Strategy also recognises the potential of St Leonards and Crows Nest as a Planned Precinct.

2. ATTRACTING THE RIGHT MARKETS FOR NORTH SYDNEY



Vanessa Levis - Northside Produce Market

Destinations increasingly understand that revenue, the economic impact of tourism, is the true metric of success, not simply visitor numbers.³

2.1. TARGET MARKETS

The first step is to define the priority target markets and primary audience for North Sydney. This is achieved through understanding the aspirations of the community and businesses of the area, opportunities to leverage existing strengths and considering the balance between economic growth and conservation and sustainability. The following criteria have informed the choice of priority target markets for North Sydney:

- increase yield;
- increase regional dispersal;
- increase length of stay, for example extending business for leisure; and
- increase visitor numbers during low periods.

Drawing on the situation analysis (see Appendix 2), the priority target markets for North Sydney are:

- Visiting Friends and Relatives (VFR), including for both domestic and international markets, noting that the most effective way to engage with the VFR market is through local residents. This provides an opportunity to enhance civic pride and awareness of the things to do across the North Sydney area;

³ - Phocuswright White Paper, *Asia-Pacific Tourism 2019: Market Trends, Opportunities and the Challenges Facing Tourism Organisations*, March 2019

- Business travellers, which is currently a strength of North Sydney. However, encouraging them to stay longer by extending their stay for leisure is an important opportunity and will contribute to the vibrancy of North Sydney. Likewise, there is an opportunity to demonstrate a point of difference to the Sydney CBD to attract boutique or smaller-scale business events and conferences; and
- Higher-yield market segments, specifically:
 - 55+, who typically have a stronger interest in heritage and history, art and creativity; and
 - Contemporary women travellers, who desire a safer destination with opportunities for health and well-being, art and creativity.

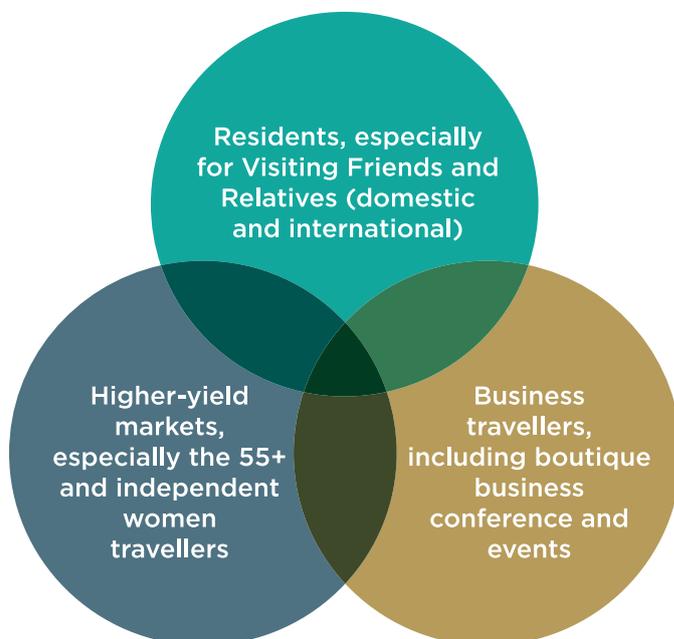


Diagram 3: Target markets for North Sydney LGA

2.2. CONTEXT FOR MARKETING AND VISITOR SERVICING

The most important marketing task is to attract the right audiences to North Sydney; at the right time.

These audiences have been chosen based on a combination of factors:

- Tourism Research Australia's visitor data for the North Sydney LGA;
- Global trends identified by international travel research companies such as SKIFT; and
- the type of audience whose attitudes and behaviour will offer the closest fit with the views and values of the North Sydney community.

Our overall approach is growing visitor value not growing visitor volume: increasing visitor yield by encouraging visitors to stay longer, disperse further and spend more.

In this section, high-priority marketing initiatives for North Sydney have been identified along with the models utilised to help determine them. In addition to the models highlighted below, there are two other very important factors that influence the recommendations:

- available budget; and
- broader marketing environment, which is extremely cluttered and highly competitive.

A global study by American market research company Yankleovich, found that less than 2% of advertising is remembered. Most advertising is ignored by most people, which makes it a very expensive way to try and capture people's attention.

For this reason, when it comes to tourism, a destination's residents are the most efficient and effective audience. Their social media networks offer what is essentially a free media channel to promote the destination. And as the message people are receiving is coming from someone they know, it makes it the most trusted form of marketing.

MARKETING MODELS

A. CUSTOMER JOURNEY

Marketing communication requires a commitment throughout the customer or visitor journey. It starts with building awareness and knowledge of the destination and continues through to influencing the experience in the destination.

The customer journey also highlights:

- the importance of pre- and post-visit communication; and
- growing awareness of the destination does not automatically lead to conversion of interest to an actual visit or booking.

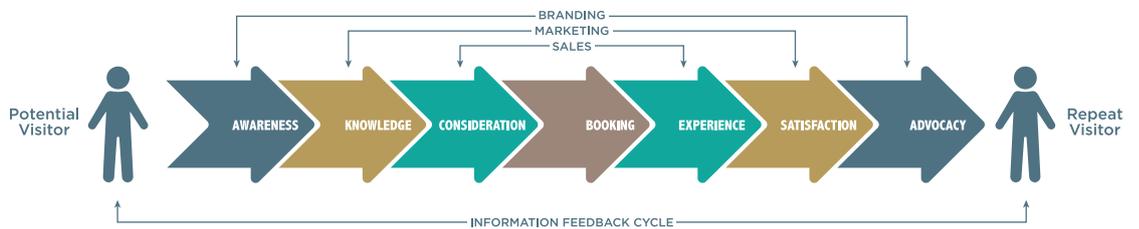


Diagram 4: Customer Journey

B. PAID, OWNED, EARNED MODEL

In today's disrupted media environment, it is critical to identify the right channels to reach the target audience for each communication activity. In the following model, communication channels have been categorised into three broad channels:

- Owned - website, social media platforms (residents) and newsletters;
- Earned - public relations articles or reviews by key influencers; and
- Paid - search engine marketing, digital and traditional advertising.

The importance of this model lies in the interaction and opportunities for leveraging each channel within the overall communications or marketing mix. Getting the balance right by identifying the right channels to reach the target market will maximise effectiveness within the available resources.

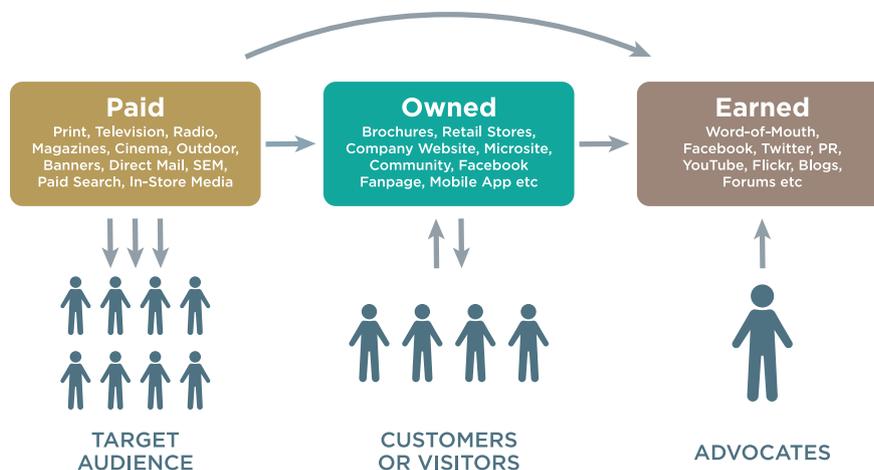


Diagram 5: Paid, Owned, Earned Model

C. REACH, INSPIRE, ENGAGE, CONNECT MODEL⁴

An important strategy for any destination is to create advocates. Word-of-mouth influences more than two-thirds of people's decisions as visitors and consumers. The channels for word-of-mouth have been changed forever by social media and the digital environment.

This means everyone who visits or interacts with North Sydney could ultimately become an advocate.

Advocates add credibility. People are more likely to believe an advocate or key influencer in their peer group before a government message. In addition, this approach assists with managing more difficult or contentious issues, as advocates may join the conversation in support of the destination.

Generally speaking, Council and its partners will focus on those aspects of each marketing model over which they have greatest influence.



Diagram 6: Reach, Inspire, Engage, Connect Model

⁴ The Reach, Inspire, Engage, Connect Model is a DMS proprietary model

2.3. MARKETING AND VISITOR SERVICING INITIATIVES

Initiative	Description and Priority Actions
1. Destination Identity	<p>Create a place brand destination identity for the North Sydney LGA. The Identity will need to be credible for the destination, compelling to target markets or audiences and competitive against other easily accessible destination choices.</p> <p>A credible, compelling and competitive destination identity (complementary to Council's corporate branding) will deliver a number of marketing benefits:</p> <ul style="list-style-type: none">• provides the 'glue' that links the variety of independent and potentially disparate precincts or villages, experiences and products together, to deliver a more cohesive and inspirational marketing story;• helps guide the development of new experiences as well as the redevelopment or improvement of existing experiences;• brings focus to help align the different stakeholders to work collaboratively;• assists the destination to more easily and consistently differentiate itself from the competition;• delivers greater cut-through from the marketing and communication clutter;• identifies partnerships and provides the clarity needed to attract partner funding, investment and promotional support. <p>Key Actions</p> <p>1.1 Create a destination identity for the North Sydney LGA, developed as a place brand, that leverages and brings to life the destination positioning statement.</p> <p>1.2 Create separate place identities for the 'hub and spokes', including North Sydney CBD/Ward Street Precinct, and St Leonards and Crows Nest.</p>
2. Develop and Curate Destination Content	<p>Develop and curate content that brings the destination identity to life through a multi-channel distribution strategy. Content to include, at a minimum are short stories, itineraries and seasonal calendars. A core objective of this initiative is to focus on developing destination stories, not just destination content.</p> <p>Key Actions</p> <p>2.1 Audit and evaluate (with a visitor-centric story lens) current destination content, including Destination NSW content on Visit NSW website.</p> <p>2.2 Create new relevant 'story focused' content, particularly around the key heritage assets, and share with relevant audience distribution channels.</p> <p>2.3 Develop a visitor-centric image library for use across multiple channels.</p>

Initiative	Description and Priority Actions
<h3>3. Visitor Services Review</h3>	<p>There is a need for the right services to be delivered, in the right places at the right time. Current distribution models, that rely primarily on councils to manage and distribute visitor information, are not necessarily servicing the needs of the majority of visitors, or potential visitors to the region, very effectively or cost-efficiently. A more effective solution will be to engage both North Sydney residents and businesses to contribute to the distribution of visitor information. The review would deliver a multi-channel visitor servicing solution tailored to North Sydney.</p> <p>Key Actions</p> <p>3.1 Develop and implement a Visitor Services Strategy, including:</p> <ul style="list-style-type: none"> • a visitor-centric website; • partnerships with local business to showcase a variety of experiences and itineraries; • partnerships with commercial tour providers to showcase the best of North Sydney; • a 'What's On' Calendar with content from Council's <i>Events Strategy</i>, for distribution to tour operators and stakeholders and for digital distribution • a 'tool' that allows residents to easily promote the destination to their friends and relatives; and • an 'ultimate concierge' concept to ensure front-of-house staff have the most up-to-date information for guests. <p>3.2 Review the Australian Tourism Data Warehouse (ATDW) listing for the destination and contact operators and tourism businesses to either list their product within the ATDW database or update their listing regularly.</p>

Initiative	Description and Priority Actions
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4. Marketing Blueprint

Prepare a strategic marketing blueprint and short-term implementation plan that:

- provides a framework of consistency when promoting the region;
- utilises the destination positioning and strategic themes to identify existing signature products and experiences to promote the destination;
- outlines the most efficient and effective tactics to target priority visitor segments; and
- provides measurable objectives (including a media and social sentiment analysis) and set targets for evaluation of outcomes.

Key Actions

4.1 Develop and implement a marketing strategy (Marketing Blue Print), including:

- promotion with relevant third-party marketing organisations.

4.2 Develop and implement a 'Be A Tourist In Your Own Backyard' strategy and campaign to grow awareness of the destination's attractions and experiences amongst residents and businesses. This is an important activity for the international and domestic VFR market.

4.3 Undertake marketing research and evaluation, including:

- research into target markets; and
- media and social sentiment analysis report.

North Sydney Council - Sub Base Platypus



3. CREATING VIBRANT COMMUNITIES AND WORLD-CLASS VISITOR EXPERIENCES



North Sydney Council - Sunset Sessions Pop-up Bar, Coal Loader

Travellers are eager for cultural experiences that are more interactive than gazing through the window of a tour bus. They want to know where the hidden gems are, and they want to connect with the local culture and people. Locals are offering insider tours, and global companies are partnering with local players to up their authenticity.⁵

The recommended actions for creating vibrant communities and world-class visitor experiences are organised to reflect:

- links to the strategic themes and target markets;
- balance between signature and supporting experiences;
- enablers for effective implementation; and
- longer-term planning for game-changing initiatives vs short to medium-term priorities.

3.1. LINKS TO STRATEGIC THEMES AND TARGET MARKETS

Today, personalisation, connecting with locals and more immersive experiences dominate global trends in tourism and hospitality. These trends, coupled with evolving technology that helps to capture and share moments of serendipity, surprise or delight, will become core to encouraging greater advocacy for North Sydney by those who visit. It will drive genuine, ‘word of mouth’ recommendations, which are the most powerful influence on people’s travel decisions. Engaging, harnessing and supporting the vibrancy of the community and local businesses will be a core priority, linked to initiatives such as:

- the Smart City Strategy and urban renewal priorities;
- reinforcing North Sydney’s ambition to be creative, culturally rich and home to a
- range of events, from more intimate to popular events;
- strengthening the night-time economy and activating weekends; and
- enhanced connectivity between precincts, improved open space and greater recognition and preservation of its heritage and history.

The strategic themes of Connected Community, Living Heritage and Dynamic Centres reflect these insights and assist in addressing:

- enabling vibrant, healthy and socially-connected communities, including events, supporting facilities, open space and infrastructure, especially those that also appeal to visitors;

- strengthening business viability and the destination’s sustainability, including through examining the year-round offering, regional dispersal and the accommodation offering;
- the role of technology in enhancing sustainability, interpretation and visitor servicing, including greater accessibility to and within North Sydney and between its villages, precincts and experiences; and
- revitalisation, activation or adaptive reuse of existing assets, including heritage assets, to inspire and support continued use (often as a signature experience).

The feedback from the consultation highlights the strengths of North Sydney’s visitor experiences as urban nature and open space, history and heritage, arts and culture. The link between these and the target markets is illustrated in the diagram, below.

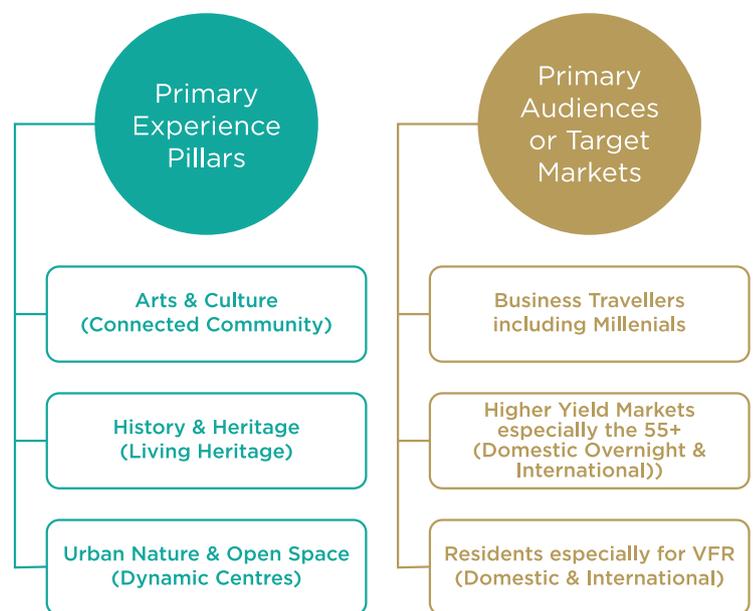


Diagram 7: Primary Experience Pillars and Target Markets for North Sydney LGA

3.2. SIGNATURE EXPERIENCES

Outlined below is a summary of the signature experience offer that would enhance the visitor appeal of North Sydney, in particular to the priority audiences identified. There are also clear benefits for the communities of the North Sydney LGA, including infrastructure and facilities that can be utilised by local people for recreation and leisure. In the following section, these signature experiences are explored in further detail to capture the enablers and ultimately actions for either Council or one of its partners to implement.

Strategic Theme 1: Connected Community

Trail Development:

- Bondi to Manly Walk
- Artists and Artisans Trail (building on the current North Sydney Public Art Trail concept)
- New History and Heritage trail (building on the Heritage Plaque Walks and North Sydney History Walks)
- New Nature trails

There is an opportunity to build on the current *North Sydney Public Art Trail* concept and leverage the planned Bondi to Manly Walk, by developing a range of themed trails showcasing North Sydney's key experience pillars of green open space, history and heritage and arts and culture. These trails should be *branded* to reflect the *creative and artistic personality* of North Sydney and link to individual experiences as well as leverage events, restaurants, cafés and galleries.

- Existing events – North Sydney Oval events, the Twilight Food Fair, the Artisans Market, the Northside Produce Market, the Crows Nest Market - some of which are already well positioned in the market place, should be highlighted as part of the experience trails.
- Certain events, for example the Kirribilli Art, Design and Fashion Market could be evolved into more substantial signature events that can act as a lighthouse for the destination and profile local galleries and experiences, including programmed activities at the Coal Loader.
- Likewise, initiatives that can help build a connection between producers and produce from, for example, the Northside Produce Market, in terms of the use and promotion of local produce within restaurants and cafes, should also be considered. The connection would help increase awareness of other North Sydney experiences as well as providing relevant promotional news for participating establishments. It would enhance the perception of the quality of North Sydney's food offering.

Trails and in particular, markets, deliver not just physical connectivity but social connectivity for residents and visitors alike. The game changer opportunity for North Sydney in the short-term is the Bondi to Manly Walk. The challenge will be making sure all of the other “ingredients” are in place to take full advantage of the opportunity it presents.

Strategic Theme 2: Living Heritage

- Sydney Harbour High Line
- Waverton Peninsula
- North Sydney Olympic Pool Complex Redevelopment
- Sub Base Platypus

Living Heritage is the essence of North Sydney's identity while not undervaluing North Sydney's natural beauty or diminishing the importance of building more connected communities. Both of which will be extremely important in attracting visitors and strengthening civic pride. But North Sydney's living heritage is essentially the LGA's competitive point of difference; as is evidenced by the multitude of destination assets that have a link to the past and a role into the future, including among others Luna Park, North Sydney Oval and North Sydney Olympic Pool, (see Appendix 4).

There are four clear and potentially game-changing opportunities, to evolve the *Living Heritage* story for North Sydney through the adaptive reuse of heritage assets and then bringing these stories to life in a remarkable way. All of which will contribute significantly to raising North Sydney's profile on the international stage. They are:

- Sydney Harbour High Line project;
- Waverton Peninsula;
- North Sydney Olympic Pool Complex Redevelopment; and
- Sub Base Platypus as part of a broader signature experience for Sydney, connected with Bondi to Manly Walk.

The Sydney Harbour High Line and Waverton Peninsula projects are both longer-term propositions yet important to securing a

sustainable, prosperous and vibrant visitor economy. The enhanced linkage with the Sydney Harbour High Line and Coal Loader, if combined with more car-free days to support a quarterly events program, would strengthen the sustainability commitment of North Sydney as well as enabling easy access for the community and visitors.

The Sydney Harbour High Line is the real game-changer; with the potential to deliver a truly immersive, must-do visitor (and local) experience.

Sub-Base Platypus provides the most immediate opportunity, especially if it is linked with North Sydney's position at the half way mark of the Bondi to Manly Walk. If packaged and promoted with the trail development proposed under the connected community strategic theme, it would result in visitors staying for longer and dispersing further.

A further significant project that would bring the Living Heritage theme to life and reinforce North Sydney's position on the 'dress circle of Sydney Harbour' is the planned redevelopment of North Sydney Olympic Pool complex. The redevelopment is a major project of Council, which was approved in March 2019 to progress to the next stage: *Stage 2 Design – Preparation of a Development Application and Statutory Approvals*. While reinforcing the way in which heritage assets can continue to be enjoyed by the community, the North Sydney Olympic Pool redevelopment also offers visitors to the LGA, including business travellers, a unique opportunity to experience and enjoy their leisure time, delivering on the global trend relating to health and well-being.

As highlighted by the Mayor Jilly Gibson in February 2019:

The concept plan brings the pool and gym facilities into the 21st century while retaining the heritage elements that our community treasures, including the entry stairwell, art deco wall along the harbour and a refreshed hall of fame.

Council recognises that the Pool plays two roles in our community. It is a much-loved and well-used local facility but it is also a Sydney icon that attracts people from across the world. These plans will ensure the Pool continues to meet community needs and remains one of the best outdoor pools in the world.

Strategic Theme 3: Dynamic Centres

- North Sydney CBD, including the New Ward Street Precinct
- Innovation Hub for a Smart and Dynamic Crows Nest

Stage 1 of the *North Sydney CBD Public Domain Strategy* and the *Ward Street Masterplan* outline an exciting vision for the future of the North Sydney CBD. With *North Sydney CBD Laneways* underway, the Ward Street Precinct moving into the implementation phase, and the new Victoria Cross Station opening in 2024, these projects will lead to a more prosperous and vibrant economy. Of particular importance are the following elements of the *Ward Street Masterplan*: a new knowledge and cultural

hub, and fine-grain 'eat streets', which have the potential to enhance the night time economy.

While the above projects have the potential to be future game changers for both the community and visitors, there are a few considerations worth highlighting in terms of future success:

A. The Hub and Spoke model. An important planning consideration will be to connect, through a network of trails, the rest of the LGA, right into the heart of the new CBD precinct. The new precinct will essentially be a new major hub (dynamic centre) for the North Sydney LGA. As such, it is important that this hub is connected to other parts of the LGA by a series of trails (spokes).

Ensuring North Sydney is a connected community (strategic theme 1) is a key step towards the vibrancy, prosperity and sustainability of both the new neighbourhood and the overall visitor economy. It will also be critical to the vibrancy of the local community. The Public Domain Strategy looks at these links and includes a series of recommendations for connecting the North Sydney CBD to other parts of the LGA.

B. Developing a clear place identity will also be important for the new Ward Street Precinct. Given that arts and culture is one of North Sydney's primary experience pillars, this should sit at the heart of this identity. In order to ensure the identity remains dynamic, it is recommended that this experience pillar be interpreted more broadly to encompass design, technology, creativity and innovation. In order to activate and reinforce this identity, North Sydney should build a reputation through, inter-alia:

- implement Council's *Events Strategy* (see Connected Community);
- develop a Public Art Masterplan across the LGA (see Connected Community);
- develop an arts/cultural based program that facilitates greater engagement between businesses and local artists, while also reaching out to a global audience to inspire and capture the essence of innovation and creativity; and
- connecting the Ward Street Precinct and coordinating activity with North Sydney Oval (NSO). While the NSO hosted 264 events in 2018, with only two weekends out of 52 without some sort of event, there is a significant opportunity to leverage and profile these events or themes by connecting them with the events planned within the Ward Street precinct.
- Infuse this sense of identity into the way that spaces and places within the Ward Street Precinct are designed. This should start with design concepts for the Culture and Knowledge Hubs that deliver truly contemporary, forward-thinking community spaces within the precinct, in line with the priorities identified within the *Ward Street Masterplan* and the *North Sydney Smart City Strategy*.

C. The hub and spoke model is also something that should be applied to parts of the LGA that sit outside of the North Sydney CBD. Not only will it help with visitor dispersal it will help clarify the place identity for each area. Important, when it comes to profiling what the area has to offer visitors.

The St Leonards and Crows Nest precinct is a priority for the implementation of this approach. The precinct already has

businesses and institutions that serve the education and health and wellness (medical and holistic health) sectors. It should be positioned and further developed as a leading centre or hub for these industries. A critical success factor, which would provide a point of difference for the North Sydney LGA, is to focus on attracting innovative and creative businesses within these sectors.

To commence activating this positioning, industry-related events, conferences, workshops and masterclasses will be important. Another tool would be to consider Council's role in providing incentives through its policies and development approvals to support new entrants or start-ups in these industries.

An important aspect of this approach is to ensure that services and experiences, including the food and drink offering, art and creativity are encouraged as they contribute to the perceived vibrancy of the precinct, which is more attractive to businesses and potential students. This would leverage:

- Crows Nest's established reputation for food, drink and entertainment;
- implementation of walking and cycling trails from the North Sydney CBD and across the LGA;
- implementation of priorities from the *Smart City Strategy*; and
- new transport links planned, including the Sydney Metro, which will provide easier access to St Leonards and Crows Nest from both the Sydney CBD and beyond as well as northern areas, such as Chatswood and Macquarie Park.

3.3. KEY CONSIDERATIONS

Key considerations for implementation of experience development priorities include:

- A. The availability of resources, including financial and human resources, will be a critical factor in delivering successful outcomes. For example, the resourcing of enabling activities (see also Section 5), such as:
- support to assist industry in terms of capability development, including;
 - Destination NSW's market-ready and export-ready programs; and
 - experience development, including packaging and bundling of products and experiences;
 - governance and ensuring that Council's regulatory environment is business friendly, encouraging investment and supporting events and other activations including partnerships or collaborations with the private-sector, government agencies (such as Sydney Harbour Federation Trust) and/or community-based organisations;
 - investigating opportunities for grant funding to support vibrant communities as well as the visitor economy as well as ensuring credible feasibility and master planning processes are undertaken;
 - building and maintaining networks and ensuring ongoing communication with local communities and businesses is essential and requires a consistent and planned approach.

These enabling activities are arguably just as critical in delivering successful outcomes as funding for infrastructure or new tourism marketing initiatives.

- B. Return on Investment (ROI) - opportunities to deliver the greatest ROI, addressing both supply and demand as well as encouraging investment in infrastructure and services.
- C. Integration with other strategies and plans relating to the North Sydney LGA.
- D. Aspirations of North Sydney's community and industry, as identified through the consultation process.
- E. Opportunities for partnerships and collaboration between the Council and industry.

It is recognised that not all initiatives are easily implemented and would require a strong commitment from the Council, community and businesses. The importance of collaboration will underpin the success of initiatives such as the Sydney Harbour High Line and other potential game changer projects.

Individual initiatives identified in the Strategy often link to other initiatives. That is, there is an opportunity to consider how each experience development initiative can leverage or strengthen the appeal of other initiatives. When considering the experience development agenda proposed in this Strategy, there is value in considering the broader outcome achieved by looking for elements that integrate across themes or support specific strategies. This will assist with staging development priorities to maximise resources and grow the appeal of the destination.

3.4. EXPERIENCE DEVELOPMENT INITIATIVES

Signature Experience	Description and Priority Actions
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CONNECTED COMMUNITY

5. North Sydney Connected Trail Development

Trails are not only a manageable way to physically connect people with North Sydney's primary experience pillars - Urban Nature and Open Space, History and Heritage and Arts and Culture - they are a very practical way to foster social connectivity. Particularly when they can be integrated with existing or new events.

As the Council's *Events Strategy* reinforces... *'Our vision is for North Sydney to be recognised for innovative events that support social cohesion and economic vibrancy within our community.'*

Importantly, events also enjoy widespread community support. Borrowing again from Council's *Events Strategy* - *'There is support for events of every size, from large festivals in the park with 15,000 people through to history walks for 12, which are booked out weeks in advance.'*

This commitment to events is also reflected in the *Community Strategic Plan*, which incorporates the following strategies:

Promote and support a diverse range of events and street life across North Sydney through the staging of major events, festivals, markets and fairs (4.2.2).

Key Actions

- 5.1 Develop a North Sydney Connected Concept Plan building on the work in the *Public Domain Strategy*, which maps existing movement of people across the LGA, linked into the walking tracks, cycling routes, experiences, accommodation options and villages or centres - east-west and north-south connections and linking to key heritage sites.
- 5.2 Conduct a signage and soft infrastructure audit to identify and prioritise:
 - directional and interpretative signage gaps and opportunities that can help guide people through the destination and connect people to the destination experiences;
 - soft infrastructure requirements such as tables, benches, BBQ facilities, water stations bins and toilets that can help deliver a positive visitor experience.
- 5.3 Implement the Council's *Events Strategy* to deliver a stronger sense of identity for North Sydney and establish links with the trails.
- 5.4 Develop a Public Art Masterplan across the LGA, with a focus on increasing public art in the public domain (Council owned land) and in the private sector, in new development (through Council's *Development Control Plan*).

Signature Experience

Description and Priority Actions

CONNECTED COMMUNITY

6. Bondi to Manly Walk

Billed as an *'80 km walk, around the most spectacular harbour in the world'* the Bondi to Manly Walk has the potential to become one of the greatest urban walks in the world. And North Sydney is the half way point, which makes it a natural stop for an overnight stay and a natural place to connect visitors with a range of North Sydney trails, that allow them to enjoy some of the destination's key experiences.

Through creating itineraries and developing partnerships with commercial tour providers, North Sydney has the opportunity to encourage people to stay overnight to explore the area and experience Sydney from a different perspective.

Key Actions

- 6.1 Support the establishment of a way marked walking track from Bondi Beach to Manly Beach.

LIVING HERITAGE

7. Sydney Harbour High Line

In 1994, disused raised train lines in Paris were transformed into the Paris High Line. In 2009, New York city followed the Paris lead and created the New York City High Line. In 2016, the residents of Lavender Bay proposed a long-term plan to convert the train line between Lavender Bay and Waverton station into the Sydney Harbour High Line (SHHL).

If there is one single experience that brings to life the recommended North Sydney positioning the SHHL is it.

Access is easy. Either walk across the Harbour Bridge or catch a train or ferry to Milsons Point. Located in one of the most stunning locations in Sydney, and the world, and containing rail tracks, tunnels, bridges and a viaduct; the SHHL wraps itself around the natural beauty of Sydney Harbour and breathes new life into one of North Sydney's most significant heritage assets.

The SHHL delivers on two of the three key strategic themes for North Sydney - Connected Community and Living Heritage. It also captures all three of the destination's primary experience pillars:

- Urban nature and open space;
- History and Heritage, and with ample opportunity to feature innovative events; and
- Arts and Culture.

As important is the contrast it offers to some of Sydney's other key attractions - the brashness of Darling Harbour, the familiarity of the Opera House and the newness of Barangaroo - making it a truly unique experience.

Signature Experience	Description and Priority Actions
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The challenge will be ensuring the opportunity lives up to its full potential. Notwithstanding the need for the NSW Government to release the land for the creation of a world-class SHHL, concept planning to bring this experience in line with global best-practice should commence.

The SHHL can become a truly remarkable international experience.

Key Actions

- 7.1 Support a world-class vision for the SHHL project and concept to create a truly remarkable signature experience.

LIVING HERITAGE

8. Waverton Peninsula

Waverton Peninsula is an oasis in the middle of Sydney Harbour with views across to the CBD skyline, the Harbour Bridge, Goat Island and surrounding peninsulas.

The Peninsula was first a place of physical and spiritual sustenance for Aboriginal Australians and is now the home of the Coal Loader Centre for Sustainability. Hiking on Balls Head Reserve is a unique experience in the sense that it's true bush walking, while still being very close to the city. There is a great opportunity to develop the Peninsula to become a showcase for Aboriginal cultural heritage and the protection of nature within urban areas.

Key Actions

- 8.1 Implement the last remaining objective of the *Waverton Peninsula Masterplan*:
 - adaptive re-use of the existing maritime assets on the BP site (Dolphin Wharf) and the Coal Loader site (former Coal Loader Jetty) to provide improved water-based access to the Peninsula.
- 8.2 Prepare a Berry's Bay Masterplan based on the principles of the *Waverton Peninsula Masterplan* to include consideration of, among other things:
 - acquisition of the Quarantine Depot, and transfer of the former Woodley's site and former BP working waterfront site to Council care, control and management;
 - explore enhanced land and water-based linkages between the Waverton Peninsula and other sites including the SHHL and Milsons Point Wharf;
 - explore provision of improved public transport and car-free days to support the events program and accessible tourism;

Signature Experience	Description and Priority Actions
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- explore potential community uses, e.g. a showcase for Aboriginal cultural heritage; and
- demonstrate commitment to sustainability and the protection of nature within urban areas.

LIVING HERITAGE

9. North Sydney Olympic Pool Complex Redevelopment

The planned redevelopment of North Sydney Olympic Pool complex is a major project of Council. It would reinforce the *Living Heritage* theme as well as North Sydney's position on the 'dress circle of Sydney Harbour' while delivering benefits to the community of North Sydney and both leisure and business travellers to the LGA. In March 2019, Council approved the project to progress to the next stage: *Stage 2 Design - Preparation of a Development Application and Statutory Approvals*.

Key Actions

- 9.1 Continue to implement the approved process for the redevelopment of the North Sydney Olympic Pool complex.

LIVING HERITAGE

10. Sub Base Platypus

Sub Base Platypus, formerly the site of a torpedo factory, submarine base and gasworks, is located at the half-way point along the Bondi to Manly Walk and has the potential to add to the waterfront offering and reinforce North Sydney's position on the dress-circle of Sydney Harbour.

Key Actions

- 10.1 Support the Sydney Harbour Federation Trust's (Harbour Trust) vision of a vibrant public domain with buildings and facilities adapted for a range of cultural, recreational, community and commercial uses at Sub Base Platypus.
- 10.2 Work with the Harbour Trust to coordinate planning and infrastructure outcomes.

Signature Experience

Description and Priority Actions

DYNAMIC CENTRES

11. North Sydney CBD, including the New Ward Street Precinct

The revitalisation of the North Sydney CBD offers another unique opportunity to both reinforce the LGA and reposition the CBD as one of Sydney's most vibrant cultural hubs. As the *North Sydney Arts and Cultural Strategic Plan* highlights 'Culture is the foundation upon which vibrant, resilient and creative communities are built.'

The challenge will be making sure the North Sydney CBD provides a clear and distinct offering, that is attractive to new business, residents and visitors. It is also important that the positioning and identity of the new Ward Street Precinct fits comfortably within the parameters of an overall North Sydney destination identity and is compelling for our key audiences.

A key factor contributing to this audience appeal will be how dynamic the identity enables the new CBD to be. To this end we would recommend that the new identity be built on a very broad platform of arts, culture and creativity. One that reflects the three core directions identified in the *North Sydney Arts and Cultural Strategic Plan*:

- Provide Creative Spaces and Opportunities;
- Support Diversity and Inclusiveness; and
- Enable Cultural Expression and Experiences.

It should also accommodate a broad range of activities, from workshops to pop-up installations; covering a diversity of subjects, from design through to technology and innovation.

Key Actions

- 11.1 Develop a clear place identity for the Ward Street Precinct in-line with the destination brand and place identities.
- 11.2 Develop a hub and spoke model of connectivity between the North Sydney CBD with the rest of the LGA based on the North Sydney Connected Concept Plan, building on the work in the Public Domain Strategy.
- 11.3 Develop and arts/cultural based program that facilitates greater engagement between businesses and local artists.

Signature Experience	Description and Priority Actions
<p>DYNAMIC CENTRES</p> <p>12. Innovation Hub for a Smart and Dynamic St Leonards and Crows Nest</p>	<p>Prioritise St Leonards and Crows Nest as a leading innovation hub for the health and wellness (medical and holistic health) and education (including creative and new technology industries) sectors. This leverages the Hub and Spoke model, <i>Smart City Strategy</i> and extends the Dynamic Centres theme further into the North Sydney LGA.</p> <p>Key Actions</p> <p>12.1 Develop a clear identity for St Leonards and Crows Nest in-line with the destination brand and place identities.</p> <p>12.2 Commence activating this identity and positioning through a program of industry-related events, conferences, workshops and masterclasses, including for the creative industries.</p> <p>12.3 Review and further consider Council's role in and capacity for providing incentives through its policy and development approvals framework to support and attract new entrants or start-ups in these industries.</p>

North Sydney Council - Burlington Street, Crows Nest



4. DELIVERING THE STRATEGY



Luna Park Sydney - Luna Park Sydney

4.1 PARTNERSHIPS

Building and maintaining strong partnerships with the local tourism industry and businesses of the area will be crucial to the delivery of the Strategy. Council will form partnerships with the private sector to, among other things:

- develop a compelling destination identity, marketing blueprint, content strategy and visitor services strategy;
- integrate visitor servicing in partnership with private sector, including to enable the implementation of Council's initiatives such as the Ward Street Masterplan's multifunctional cultural hub as well as potentially considering an outsourced model for delivery of visitor services by a private sector provider;
- create and promote a capability development program, including connecting the local industry with relevant programs such as those run by Destination NSW, including the *Get Connected and NSW First* programs. This should involve networking opportunities to strengthen relationships and inspire collaboration between different businesses and industries across the LGA;
- encourage, support or, where appropriate, lead experience and precinct development or revitalisation; and
- facilitate working groups to engage stakeholders and commercial operators to ensure their involvement in and consultation on visitor economy-related projects.

4.2 MONITORING, EVALUATING AND REPORTING

Council will undertake regular monitoring and evaluation of progress against the Strategy and Action Plan. Progress will be reported to Council and included in the Annual Report and End of Term Report.

5. ACTION PLAN



North Sydney Council - North Sydney Olympic Pool

The Strategy is supported by a prioritised Action Plan, which includes the actions, performance measures, responsible departments and timeframe for delivering the objectives.

In order to prioritise the Strategy's Action Plan, a set of criteria has also been developed:

- opportunities to deliver the greatest return on investment, addressing both supply and demand as well as encouraging investment in infrastructure and services;
- integration with other strategies and plans relating to the North Sydney LGA;
- best fit with available resources;
- aspirations of North Sydney's community and industry, as identified through the consultation process; and
- opportunities for partnerships and collaboration between the Council and industry.

It is recognised that not all initiatives are easily implemented and would require a strong commitment from Council, community and business support and in some cases, significant resources. The actions are separated into the following categories:

- immediate;
- medium-term; and
- longer-term.

The immediate and medium-term actions, such as the marketing actions, are more easily achieved, albeit with potential reallocation of existing resources or through adopting new procedures or practices.

The longer-term actions, such as the Sydney Harbour High Line, are ambitious. They would require significant additional resources, not all of which would be able to be funded by Council. However, if implemented in a multi-year, staged approach, they would contribute significantly to the economic growth of the LGA through the visitor economy.

The following Action Plan identifies the implementation actions required to deliver the initiatives recommended to deliver the proposed strategic framework. It should be noted that the table only provides a summary of the actions.

KEY TO TABLE:

PRIORITY:

- H - High priority for immediate implementation - within next 12 months (2019/20)
- M - Medium priority based on availability of resources - within 2 - 3 years (2019/20 - 2021/22)
- L - Low priority based on availability of resources - within 4 - 5 years (2022/23 - 2024/25)
- O - Ongoing action - action commenced and to be continued

PERFORMANCE MEASURE:

The way in which progress will be measured for each action

OUTCOME TIMEFRAME:

- Immediate - the project outcome will be a direct result of the action
- Medium-term - the action will result in the project outcome over the medium term. However, other actions or resources may also be required to achieve the outcome
- Longer-term - the action is the first step towards the project outcome. However, other actions or resources will be required to achieve the outcome

ROLE FOR COUNCIL:

- Advocate
- Funder
- Partner
- Regulator
- Service Provider

RESPONSIBILITY:

- Council - action to be undertaken by Council
- Joint - action to be undertaken in collaboration between Council and another organisation
- Lead department(s) - the Council department responsible for the action

ATTRACTING THE RIGHT MARKETS TO NORTH SYDNEY

REF	PRIORITY	ACTION	PERFORMANCE MEASURE	OUTCOME/TIMEFRAME	ROLE/RESPONSIBILITY
1 DESTINATION IDENTITY					
1.1	H	Create a destination identity for the North Sydney LGA, developed as a place brand, that leverages and brings to life the destination positioning statement.	Destination identity and guidelines developed	Immediate	Council role: Funder Responsibility: Joint (with tourism partners) Lead department(s): Communications & Events/Integrated Planning & Special Projects
1.2	H	Create separate place identities for the 'hub and spokes', including North Sydney CBD/Ward Street Precinct, and St Leonards and Crows Nest.	Place identities and guidelines developed	Immediate	Council role: Funder Responsibility: Joint (with tourism partners) Lead department(s): Communications & Events/Integrated Planning & Special Projects
2 DEVELOP AND CURATE DESTINATION CONTENT					
2.1	H	Audit and evaluate (with a visitor-centric story lens) current destination content, including Destination NSW content on Visit NSW website.	Destination content audit completed, with recommendations for future action	Immediate	Council role: Service Provider Responsibility: Joint (with tourism partners) Lead department(s): Communications & Events/Integrated Planning & Special Projects
2.2	H	Create new relevant story focused' content, particularly around the key heritage assets, and share with relevant audience distribution channels.	Destination content developed and shared, including key messaging and story-lines	Immediate	Council role: Service Provider Responsibility: Joint (with tourism partners) Lead department(s): Communications & Events/Integrated Planning & Special Projects
2.3	H	Develop a visitor-centric image library for use across multiple channels.	Image library developed	Immediate	Council role: Funder Responsibility: Joint (with tourism partners) Lead department(s): Communications & Events/Integrated Planning & Special Projects/

REF	PRIORITY	ACTION	PERFORMANCE MEASURE	OUTCOME/TIMEFRAME	ROLE/RESPONSIBILITY
3 VISITOR SERVICES REVIEW					
3.1	H	<p>Develop and implement a Visitor Services Strategy, including:</p> <ul style="list-style-type: none"> a visitor-centric website; partnerships with local business to showcase a variety of experiences and itineraries; partnerships with commercial tour providers to showcase the best of North Sydney; a 'What's On' Calendar with content from Council's Events Strategy, for distribution to tour operators and stakeholders and for digital distribution a 'tool' that allows residents to easily promote the destination to their friends and relatives; and an 'ultimate concierge' concept to ensure front-of-house staff have the most up-to-date information for guests. 	Visitor Services Strategy developed and implemented	Immediate	<p>Council role: Service Provider Responsibility: Joint (with tourism partners) Lead department(s): Communications & Events/Integrated Planning & Special Projects</p>
3.2	H	<p>Review the ATDW listing for the destination and contact operators and tourism businesses to either list their product within the ATDW database or update their listing regularly.</p>	ATDW listing review undertaken and tourism businesses contacted	Immediate	<p>Council role: Service Provider Responsibility: Joint (with tourism partners) Lead department(s): Communications & Events/Integrated Planning & Special Projects</p>
4 MARKETING BLUEPRINT					
4.1	H	<p>Develop and implement a marketing strategy (Marketing Blueprint) including:</p> <ul style="list-style-type: none"> promotion with relevant third-party marketing organisations. 	Marketing strategy developed and implemented	Immediate	<p>Council role: Funder Responsibility: Joint (with tourism partners) Lead department(s): Communications & Events/Integrated Planning & Special Projects</p>
4.2	M	<p>Develop and implement a 'Be A Tourist In Your Own Backyard' strategy and campaign to grow awareness of the destination's attractions and experiences amongst residents and businesses. This is an important activity for the international and domestic VFR market.</p>	VFR marketing campaign completed across multiple channels	Medium-term	<p>Council role: Funder/Joint: Responsibility: Joint (with tourism partners) Lead department(s): Communications & Events/Integrated Planning & Special Projects</p>
4.3	L	<p>Undertake marketing research and evaluation, including:</p> <ul style="list-style-type: none"> research into target markets; and. a media and social sentiment analysis report. 	Marketing research and evaluation undertaken, including recommendations for future action	Long-term	<p>Council role: Funder Responsibility: Joint (with tourism partners) Lead department(s): Communications & Events/Integrated Planning & Special Projects</p>

CREATING VIBRANT COMMUNITIES & WORLD-CLASS VISITOR EXPERIENCES

REF	PRIORITY	ACTION	PERFORMANCE MEASURE	OUTCOME/TIMEFRAME	ROLE/RESPONSIBILITY
5	CONNECTED COMMUNITIES - North Sydney Connected Trail Development				
5.1	M	Develop a North Sydney Connected Concept Plan building on the work in the <i>Public Domain Strategy</i> , which maps existing movement of people across the LGA, linked into the walking tracks, cycling routes, experiences, accommodation options and villages or centres - east-west and north-south connections and linking to key heritage sites.	North Sydney Connected Concept Plan developed, including recommendations for future action	Medium-term	Council role: Service Provider Responsibility: Council Lead department(s): Engineering Infrastructure/Landscape Planning & Design/ Strategic Planning/Traffic & Transport Operations
5.2	M	Conduct a signage and soft infrastructure audit to identify and prioritise: <ul style="list-style-type: none"> directional and interpretative signage gaps and opportunities that can help guide people through the destination and connect people to the destination experiences; soft infrastructure requirements such as tables, benches, BBQ facilities, water stations bins and toilets that can help deliver a positive visitor experience. 	Signage and soft infrastructure audit developed, including recommendations for future action	Medium-term	Council role: Service Provider Responsibility: Council Lead department(s): Engineering Infrastructure/Landscape Planning & Design/ Strategic Planning/Traffic & Transport Operations
5.3	H	Implement the Council's <i>Events Strategy</i> to deliver a stronger sense of identity for North Sydney and establish links with the trails.	Events Strategy implemented, including Council and third party events	Immediate	Council role: Service Provider Responsibility: Council Lead department(s): Communications & Events
5.4	H	Develop a Public Art Masterplan across the LGA, with a focus on increasing public art in the public domain (Council owned land) and in the private sector in new developments (through Council's Development Control Plan).	Public Art Masterplan developed, including recommendations for future action	Immediate	Council role: Service Provider Responsibility: Council Lead department(s): Community Development/ Development Services/ Engineering Infrastructure/Landscape Planning & Design/ Strategic Planning
6	CONNECTED COMMUNITIES - Bondi To Manly Walk				
6.1	O	Support the establishment of a way marked walking track from Bondi Beach to Manly Beach.	Implement Council's role and responsibilities in the Bondi to Manly MOU, including the installation and maintenance of way marks	Immediate	Council role: Partner Responsibility: Joint (with Bondi to Manly Walk Supporters) Lead department(s): Engineering Infrastructure/Landscape Planning & Design

REF	PRIORITY	ACTION	PERFORMANCE MEASURE	OUTCOME/TIMEFRAME	ROLE/RESPONSIBILITY
7 LIVING HERITAGE - Sydney Harbour High Line					
7.1	H	Support a world-class vision for the SHHL project and concept to create a truly remarkable signature experience.	Meetings attended and written responses provided, as requested	Longer-term	Council role: Advocate Responsibility: Joint (with Sydney Harbour High Line Association) Lead department(s): Development Services/ Landscape Planning & Design/Strategic Planning
8 LIVING HERITAGE - Waverton Peninsula					
8.1	O	Implement the last remaining objective of the <i>Waverton Peninsula Masterplan</i> : <ul style="list-style-type: none"> adaptive reuse of the existing maritime heritage assets on the BP site (Dolphin Wharf) and Coal Loader site (former Coal Loader Jetty) to provide improved water-based access to the Peninsula. 	<i>Waverton Peninsula Masterplan</i> implemented and evaluation undertaken	Longer-term	Council role: Partner Responsibility: Joint (with NSW Department of Transport (Roads and Maritime Services)) Lead department(s): Development Services/ Environmental Services/ Landscape Planning & Design/ Strategic Planning
8.2	M	Prepare a <i>Berry's Bay Masterplan</i> based on the principles of the <i>Waverton Peninsula Masterplan</i> to include consideration of, among other things: <ul style="list-style-type: none"> acquisition of the Quarantine Depot, and transfer of the former Woodleys site and former BP working waterfront site to Council care, control and management; explore enhanced land and water-based linkages between the Peninsula and other sites, e.g. the SHHL and Milsons Point Wharf; explore provision of improved public transport and car-free days to support the events program and accessible tourism; explore potential community uses, e.g. a showcase for Aboriginal cultural heritage; demonstrate commitment to sustainability and the protection of nature within urban areas. 	Revised <i>Berry's Bay Masterplan</i> developed	Longer-term	Council role: Partner Responsibility: Joint (with NSW Department of Planning, Industry and Environment (Housing and Property)) Lead department(s): Development Services/ Environmental Services/ Landscape Planning & Design/ Strategic Planning
9 LIVING HERITAGE - North Sydney Olympic Pool Complex Redevelopment					
9.1	O	Continue to implement the approved process for the redevelopment of the North Sydney Olympic Pool complex.	Preparation of development application and associated detailed design completed based on Option 2b	Medium-term	Council role: Partner Responsibility: Joint (with Australian Department of Health (Sport Australia) and NSW Department of Premier and Cabinet (Office of Sport)) Lead department(s): Development Services/Engineering Infrastructure/Strategic Planning

REF	PRIORITY	ACTION	PERFORMANCE MEASURE	OUTCOME/TIMEFRAME	ROLE/RESPONSIBILITY
10	LIVING HERITAGE - Sub Base Platypus				
10.1	O	Support the Sydney Harbour Federation Trust's (Harbour Trust) vision of a vibrant public domain with buildings and facilities adapted for a range of cultural, recreational, community and commercial uses at Sub Base Platypus.	Council continues to participate in the Sub Base Platypus Community Advisory Committee	Medium	Council role: Partner Responsibility: Joint (with Sydney Harbour Federation Trust) Lead department(s): Development Services/Landscape Planning & Design/Strategic Planning
10.2	O	Work with the Harbour Trust to coordinate planning and infrastructure outcomes	Council continues to advise on the redevelopment of Sub Base Platypus, including site management and transport	Medium	Council role: Partner Responsibility: Joint (with Sydney Harbour Federation Trust) Lead department(s): Development Services/Landscape Planning & Design/Strategic Planning
11	DYNAMIC CENTRES - North Sydney CBD, including the New Ward Street Precinct				
11.1	H	Develop a clear place identity for the Ward Street Precinct in-line with the destination brand and place identities.	<i>Ward Street Precinct Masterplan</i> implemented, including detailed design of community spaces	Longer-term	Council role: Service Provider Responsibility: Council Lead department(s): Engineering Infrastructure/Landscape Planning & Design/Strategic Planning
11.2	O	Develop a hub and spoke model of connectivity between the North Sydney CBD and the rest of the LGA based on the North Sydney Connected Concept Plan, building on the work in the <i>Public Domain Strategy</i> .	Public Domain Strategy Stage 2 developed, including detailed design for streets and laneways	Longer-term	Council role: Service Provider Responsibility: Council Lead department(s): Engineering Infrastructure/Landscape Planning & Design/Strategic Planning/Traffic & Transport Operations
11.3	H	Develop an arts/cultural based program that will facilitate greater engagement between businesses and local artists.	Arts/cultural based program delivered with businesses	Medium-term	Council role: Service Provider Responsibility: Council Lead department(s): Community Development/Integrated Planning & Special Projects

REF	PRIORITY	ACTION	PERFORMANCE MEASURE	OUTCOME/TIMEFRAME	ROLE/RESPONSIBILITY
12	DYNAMIC CENTRES - Innovation Hub for a Smart and Dynamic St Leonards and Crows Nest				
12.1	H	Develop a clear identity for St Leonards and Crows Nest in-line with the destination brand and place identities.	Council continues to advise on the planning process for the St Leonards and Crows Nest Planned Precinct	Longer-term	Council role: Partner Responsibility: Joint (with NSW Department of Planning, Industry and Environment (Place Design and Public Spaces)) Lead department(s): Engineering Infrastructure/Landscape Planning & Design/ Strategic Planning
12.2	M	Commence activating this identity and positioning through delivering and actively promoting a program of industry-related events, conferences, workshops and masterclasses, including for the creative industries.	Audit of local events completed, including recommendations for future action	Medium-term	Council role: Partner Responsibility: Joint (with tourism partners) Lead department(s): Communications & Events/Community Development/ Integrated Planning & Special Projects
12.3	H	Review and further consider Council's role in and capacity for providing incentives through its policy and development approvals framework to support and attract new entrants or start-ups in these industries.	VPA at 100 Christie Street approved and approval granted for construction of co-working space Approval granted for the construction of the contemporary arts centre at 617-621 Pacific Highway	Longer-term	Council role: Regulator Responsibility: Joint (with NSW Department of Planning, Industry and the Environment (Planning and Assessment)) Lead department(s): Development Services/ Strategic Planning

GLOSSARY

IMPORTANT TERMS:

Australian Tourism Data Warehouse (ATDW): A centralised database of more than 40,000 Australian tourism products and destinations, supplying NSW products to 70 plus websites including australia.com. Destination NSW's Get Connected Program provides tourism operators with access to a tool called ATDW-Online. This tool feeds a central database managed by ATDW, which in turn feeds the product information to Australia's official travel websites.¹

Dispersal: Dispersal in the context of the visitor economy relates to the opportunity to shift the focus of visitation away from either highly sensitive sites or to avoid overcrowding during peak periods. In some cases, it can assist in mitigating the impacts of over-tourism.

Export-ready: Being export ready means you are ready to work with distribution partners to sell your product. This includes third party distributors, or trade sales partners, such as inbound tour operators (ITOs), wholesalers, online travel agents (OTAs) and retailers to sell your product to visitors overseas. Export ready businesses also factor appropriate commissions into their pricing.²

High yield markets: High yield markets relate to those markets who have the propensity or capacity to spend more money on their holidays or during leisure time. For example, on more expensive accommodation or experiences, such as small group or personalised tours.

Market-ready: Refers to a business that markets to potential visitors; communicates with potential visitors year-round and is ready to accept advanced bookings or reservations. It is a basic standard that relates to business-readiness. In today's world, it is important to consider online capability and capacity as part of market-readiness.

Products and packaging for tourism: 'Product' refers to any tourism service or combination of services that can be offered to the market for sale, use or consumption; this includes physical objects, services, people, places, organisations and ideas. 'Packaging' involves combining products to create appealing – and ideally, unique – tourism options that can be effectively marketed and sold.

1 - See: <https://www.destinationnsw.com.au/tourism/industry-opportunities/connect-your-tourism-product>

2 - See Destination NSW's Inbound Strategy Guide: <http://www.destinationnsw.com.au/wp-content/uploads/2017/04/NEW-Inbound-Strategy-Guide-PAGES-for-website.pdf?x15361>

APPENDIX 1

REVIEW OF EXISTING PLANS AND STRATEGIES



North Sydney Council - Wednesday Wellness, Coal Loader

Ensuring that the Strategy is integrated within the broader work of Council is critical. The Strategy has been developed to link to, reinforce and be informed by other relevant plans and strategies of Council. It also recognises the Greater Sydney Commissions' *North District Plan*, which states:

- a. encouraging the development of a range of well-designed and located facilities*
- b. enhancing the amenity, vibrancy and safety of centres and township precincts*
- c. supporting the development of places for artistic and cultural activities.*
- d. improving public facilities and access*
- e. protecting heritage and biodiversity to enhance cultural and eco-tourism*
- f. supporting appropriate growth of the night-time economy*
- g. developing industry skills critical to growing the visitor economy incorporating transport planning to serve the transport access needs of tourists*

In reviewing these a number of preliminary themes emerged:

- Liveability - including healthy, socially-connected communities, events and open space;
- Sustainability - including protection and enhancement of the environment;
- Civic pride and respect for the LGA's rich and diverse history and heritage; and
- Prosperous and vibrant economy - including a more enticing night-time economy and laneway activations within the North Sydney CBD.

Importantly, these themes inform an understanding of the values and aspirations of the residential and business communities of North Sydney, which have been confirmed through consultation.

The links between the preliminary themes and Council's key plans and strategies are listed below.

Liveability – including healthy, socially-connected communities, events and open space;

Sustainability – including protection and enhancement of the environment;

North Sydney Community Strategic Plan 2018-2028:

- Outcome 1.4 Public open space and recreational facilities and services; meet community needs;
- Outcome 2.3 Sustainable transport is encouraged;
- Outcome 3.1 Prosperous and vibrant economy;
- Outcome 3.3 North Sydney is distinctive with a sense of place and quality design;
- Outcome 4.1 North Sydney is connected, inclusive, healthy and safe;
- Outcome 4.2 North Sydney is creative and home to popular events;

Draft Arts and Cultural Strategic Plan 2019-2022:

- Direction 1 Provide Creative Spaces and Opportunities;
- Direction 2 Enable Creative Expression and Cultural Experiences;
- Direction 3 Support Diversity and Inclusiveness;

Draft North Sydney Council Events Strategy 2019-2021:

- Priority Area 1 Improve the strategic approach to event management;
- Priority Area 2 Initiate and deliver new local and regional community events;
- Priority Area 3 Support events organised by external organisations.

Civic pride and respect for the LGA's rich and diverse history and heritage;

North Sydney Community Strategic Plan 2018-2028:

- Outcome 3.4 North Sydney is distinctive with a sense of place and quality design;
- Outcome 4.4 North Sydney's history is preserved and recognised.

Prosperous and vibrant economy – including a more enticing night-time economy and laneway activations within the North Sydney CBD

North Sydney Community Strategic Plan 2018-2028:

- Outcome 2.2 Vibrant centres, public domain, villages and streetscapes;
- Outcome 3.1 Prosperous and vibrant economy;
- Outcome 3.2 North Sydney CBD is one of NSW's pre-eminent commercial centres;
- Outcome 3.3 North Sydney is smart and innovative;
- Outcome 3.4 North Sydney is distinctive with a sense of place and quality design;

North Sydney CBD Public Domain Strategy (2019):

- B1 Civic Spine;
- B2 Streets and Lanes;
- B3 Squares and Rooftops;
- B4 Green Space:
- B5 Architecture and Building Interfaces;

North Sydney Economic Development Strategy (2016):

- Limited vibrancy North Sydney Centres;
- Limited night time economy;

North Sydney Smart City Strategy 2019-2022

- Smart Infrastructure – creating vibrant and liveable places;
- Smart Economy – driving opportunity and productivity;

Stage 2 Ward Street Precinct Masterplan (2019):

- The Green Square;
- Ward Street Knowledge Hub;
- Ward Street Cultural Hub.

North Sydney Council - Warren Langley and Julia Davis, Angles of Incidence



APPENDIX 2

SITUATION ANALYSIS



Vanessa Levis - Northside Produce Market

The Situation Analysis provides a baseline from which the Strategy was developed and to determine priorities for the future growth of North Sydney's visitor economy. It includes analysis of the visitor research as well as relevant global and domestic trends in travel.

Visitor research for North Sydney LGA

Analysis of data from Tourism Research Australia over the past five years suggests that approximately 0.6 million visitors are attracted to the North Sydney LGA⁶ each year. Almost half of those visitors (43%) stayed overnight or longer, while 57% were day visitors. In 2016/17 visitors (to North Sydney) spent \$698 million on accommodation, hospitality, entertainment and leisure⁷.

⁶ For the purpose of tourism analysis, the North Sydney LGA is comprised of SA2 areas that match the LGA boundaries defined by ABS. In some situations, the boundaries do not match completely but give a close approximation of the towns and suburbs in the LGA.

⁷ <https://economy.id.com.au/north-sydney/tourism-value>

Summary Table

NORTH SYDNEY LGA	2013/14	2014/15	2015/16	2016/17	2017/18	5 Year Average
Domestic Overnight	250.1	206.9	223.7	191.5	278.9	225.2
% Increase		-17%	8%	-14%	46%	6%
Domestic Nights	661.3	484.6	504.9	585.9	611.3	546.7
% Increase		-27%	4%	16%	4%	-1%
Average Night Stay	2.6	2.3	2.3	3.1	2.2	2.5
Domestic Days	440.9	426.4	377.3	334.7	302.5	360.2
% Increase		-3%	-12%	-11%	-10%	-9%
International Overnight	48.1	42.9	62.2	64.1	73.7	60.7
% Increase		-11%	45%	3%	15%	13%
International Nights	1,412.8	1,447.1	1,459.3	1,663.7	1,611.2	1,545.4
% Increase		2%	1%	14%	-3%	4%
Average Night Stay	29.4	33.8	23.5	26.0	21.9	26.3
Total Visitors	739.1	676.1	663.1	590.3	655.1	646.1
% Increase		-9%	-2%	-11%	11%	-3%
Total Nights '000	2,074.1	1,931.7	1,964.2	2,249.6	2,222.5	2,092.0
% Increase		-7%	2%	15%	-1%	2%

International

Over the past five years, an average of 60,700 international visitors spent 1.5 million nights in North Sydney LGA, accounting for 74% of the total visitor nights. In 2017/18, the average length stay for international visitors was 27.0 nights, higher than the average for New South Wales of 21.0 nights⁸, and in line with other Sydney Council areas such as Bondi (25.0 nights) and Northern Beaches (26 nights) although significantly higher than the average nights for Greater Sydney (18.8 nights).

In 2017/18, the main international markets were New Zealand (14%), USA (14%) and UK (13%). Over the past five years, China has showed an increase from 4% in 2013/14 to 11% in 2017/18.

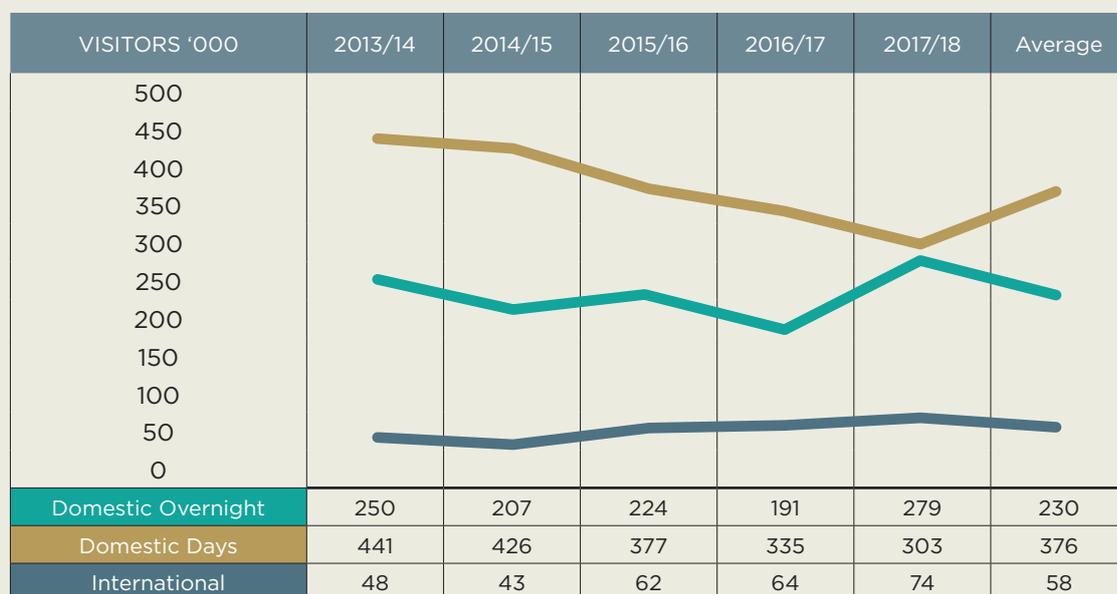
Domestic

In 2017/18, there were 581,410 domestic visitors to the North Sydney LGA with 302,500 day visitors and 278,900 overnight visitors. As shown over the past five years there has been a decrease in day visitors of around 9%, while overnight visitors have increased by an average of 6% over that time.

Domestic overnight visitors stayed an average of 2.2 nights in North Sydney for a total of 611,300 nights in 2017/18.

⁸ <https://www.destinationnsw.com.au/wp-content/uploads/2018/11/travel-to-nsw-snapshot-june-18.pdf>

Visitation Movements



While there is no specific research available into the cause of the decline in domestic day tourism to North Sydney over the last five years, it is worthwhile reflecting on some of the general causes of declining visitation faced by destinations. For example, decline in visitor numbers can be caused by:

- Lack of appeal of the destination or things to do. This can be exacerbated by a lack of new or enhanced experiences or products being developed or launched, poor communication about what to do in the destination or the closure of 'hero' attractions or experiences in the area. The lack of 'new news' as well as poor service levels can significantly impact repeat visitation;
- Weather or other significant events. This is particularly the case for regions that are highly-dependent on good weather, such as those popular for walking or other outdoor recreation pursuits or attractions;
- Increased interest in competitor destinations. In the Greater Sydney region, the opening of sites such as Barangaroo or popular events such as Vivid can draw attention away from other areas, especially with domestic day visitors who may only be visiting Sydney for the weekend; and
- Less successful or targeted marketing activities to keep the destination top of mind (with the target audience) in a highly competitive marketplace.

The first step towards addressing the decline in market share is to better understand the circumstances relating to the region. This will enable the destination to better target efforts to correct the underlying cause. A recommended approach is to undertake an online media and social sentiment analysis, which involves:

- Media analytics of online sources including but not limited to TripAdvisor, blogs and online media outlets; and
- Social media channels, specifically Facebook (public mentions only), Twitter, Instagram and blogs, forums, news and websites. It assesses the number of mentions and social media reach, including shares, comments and likes.

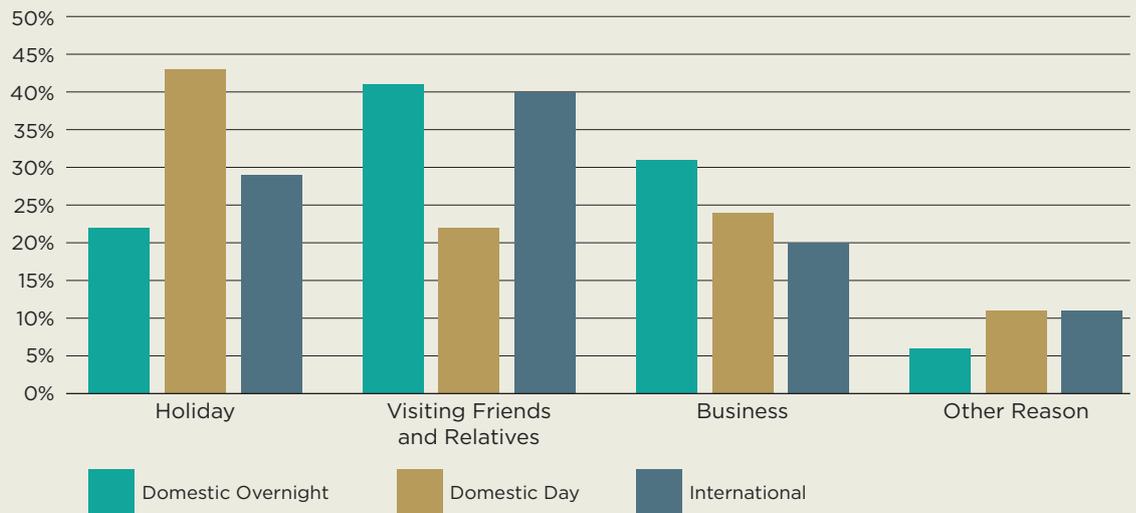
It provides highly-relevant and up-to-date insights into the perception of the destination from a tourism perspective. It enables some of the perceived strengths and weaknesses of the region to be easily identified from a customer view-point (positive and negative sentiment) while assisting to shape recommendations relating to addressing gaps and opportunities for destination development and capability building. It reinforces the importance of adopting a customer-centric approach.

Reason for visit

In 2017/18, visiting friends and relatives (VFR) was a popular reason to visit North Sydney for both international and domestic overnight visitors (approx. 40%), but not so much for day visitors who enjoyed holiday and leisure activities. As shown in the chart below,

travelling for business accounted for around 25% of visitors in all three markets. 'Other reasons' (approx. 10%) include medical and personal appointments and education.

Reasons for Travel

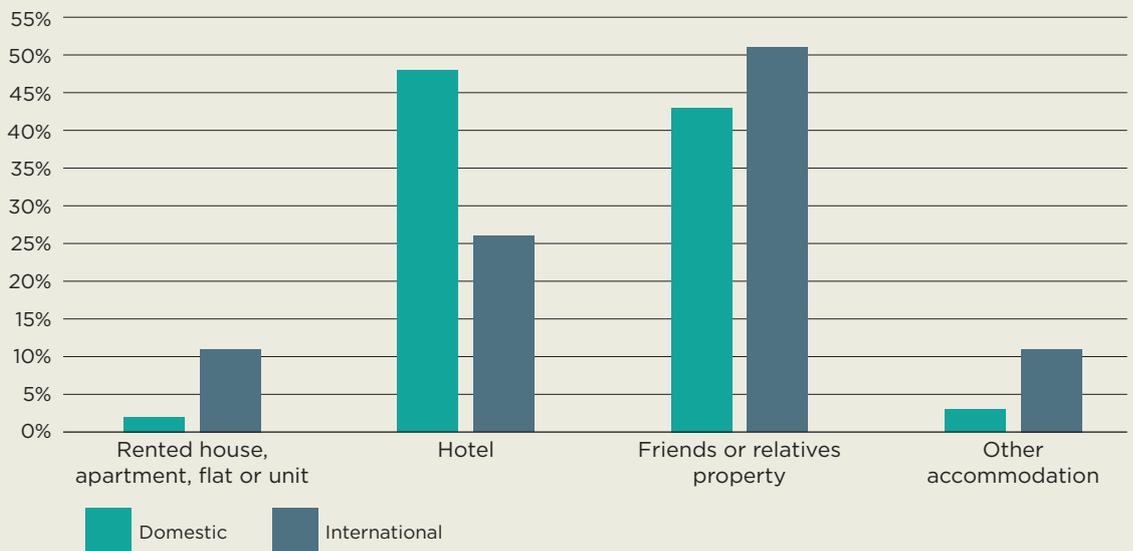


Accommodation

In 2017/18, accommodation used by most visitors was primarily a friend’s or relative’s property or a hotel. As shown, there were some differences between the international and domestic market, with the international visitors favouring friend’s and relative’s properties (51%) and domestic visitors preferring hotel style accommodation (48%).

International visitors use a broader range of ‘other’ accommodation including rented units, hostel, homestay or private residence (Airbnb).

Accommodation Types

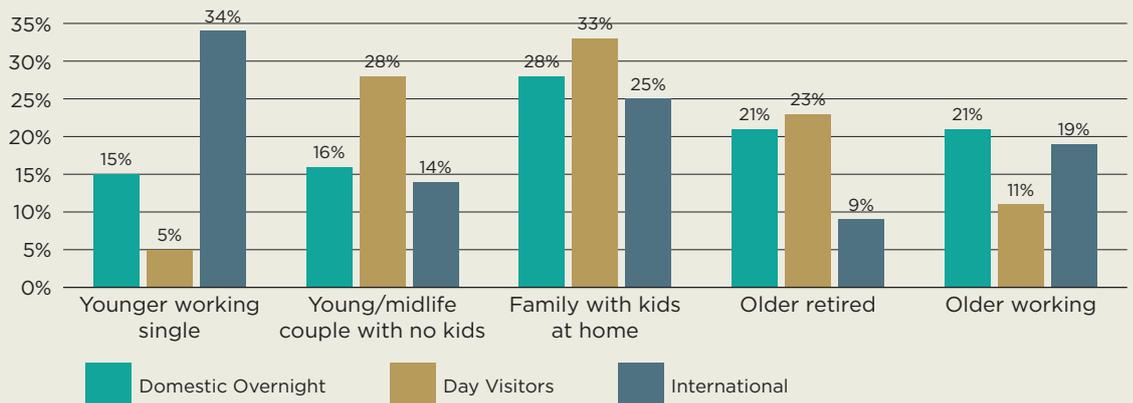


Lifecycle of Visitors

The graph below illustrates the life cycle of visitors against the three market sources - international, domestic day and domestic overnight visitors. In 2017/8, North Sydney has primarily attracted families with children still at home. However, while families are attracted from all three markets, international visitors are comprised primarily of young working singles (34%).

As shown, domestic day visitors include a higher ratio of young couples (28%) as well as families (33%), while domestic overnight visitors are predominantly in older lifecycle segments with 21% older working visitors.

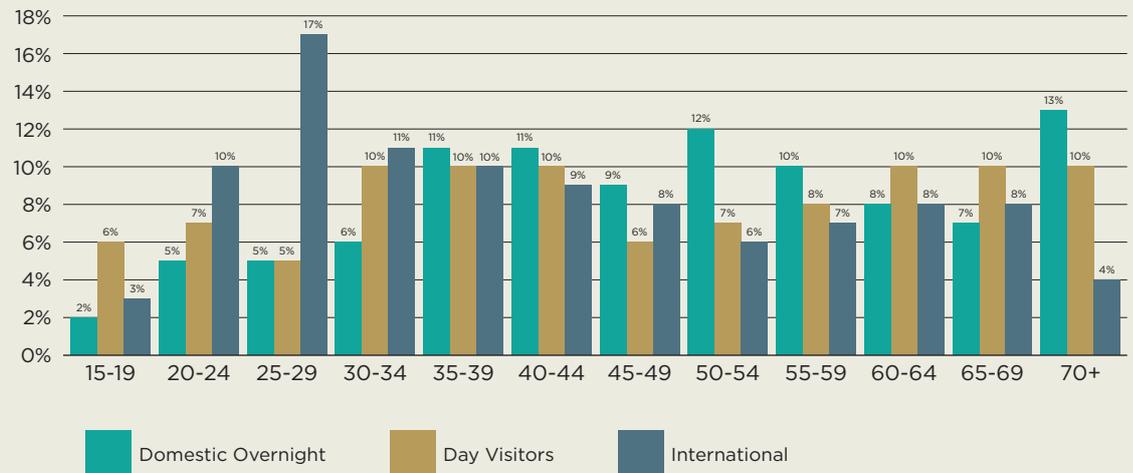
Lifecycle of Visitors



Age of Visitors

As suggested in the analysis of visitor lifecycle, the age of visitors also differs between the three markets. Over the past five years, international visitors have been in younger age groups (17% aged between 25-29), while domestic visitors have a wider range of ages attracted to the area, and no predominant age group. Domestic overnight visitors have the lowest proportion of young travellers (2% for 15-19; and 5% for 20-24).

Age of Visitors



Key Learnings

- VFR is the number one reason for both international domestic overnight visitation, accounting for around 40% of total visitation for those markets;
- Travelling for business was the second most important reason for domestic overnight visitation and also accounted for around 20% of international visitors. Further insights into business-related travel to North Sydney are included below as part of the trend analysis;
- Domestic overnight visitors skew towards the older lifecycle segments; and
- International visitors are comprised primarily of young working singles (34%).

INSIGHTS FROM RELEVANT GLOBAL AND DOMESTIC TRENDS IN TRAVEL AND TOURISM

An understanding of global and domestic travel and tourism trends is important as it provides insights about the potential opportunities and informs strategic directions that have a direct impact on the visitor economy for North Sydney.

The key sources of this information include:

- Global tourism and travel research agencies, including Skift, Phocuswright and Euromonitor International; and
- Kantar TNS Domestic 2018.

Growth Market Opportunities

There are a number of market segments where significant growth is expected to continue both within Australia and around the world, including:

- Continuing rise in the numbers of contemporary female travellers, who are more likely to have a higher disposable income and to travel either on their own or in small groups of friends. They are also key influencers in family travel. This market is seeking new experiences that immerse them into the destination and the local culture. Health and well-being as well as arts and culture are important influences on this market.
- The fifties (or 55+) are an exciting demographic for travel – more people are choosing to travel earlier than retirement to enjoy the more active or immersive experiences that destinations have to offer. Globally, the 55+ market has the highest disposable income and are seeking new destinations to add to their bucket- list. Domestically, this market is travelling within Australia as well as overseas. They are as equally excited about an Australian holiday as they are about an overseas trip. This market has significantly evolved from the behaviour of the same demographic in previous generations; in today's world, the 55+ market want to be more engaged in the experience and feel a part of the 'local scene'. They are also much more physically active (for example, more likely that previous generations of 55+ to participate in outdoor recreation pursuits while on holidays) and want to be
- perceived as being 'young at heart.' Domestically, they are also looking for short- break escapes and often choose to travel outside of peak periods to avoid the crowds.
- Millennials continue to travel more domestically than previous generations of their age. For North Sydney, Millennials represent a significant proportion of the business travel market as well as the international market, which includes travel for education. This trend reinforces the importance of adopting an approach that assists in blending business with leisure and ensure that the centres and villages are vibrant. This is also important to establishing highly-attractive education precincts.
- VFR continues to be an important reason for travel, both domestically and internationally. Increasingly, the VFR market are choosing to stay in commercial accommodation, participate in local tours, activities and experiences and will often travel outside of peak periods to immerse themselves in the destination. It is important to market to the host to reach the VFR market.

.....

“Travellers are eager for cultural experiences that are more interactive than gazing through the window of a tour bus. They want to know where the hidden gems are, and they want to connect with the local culture and people. Locals are offering insider tours, and global companies are partnering with local players to up their authenticity.”

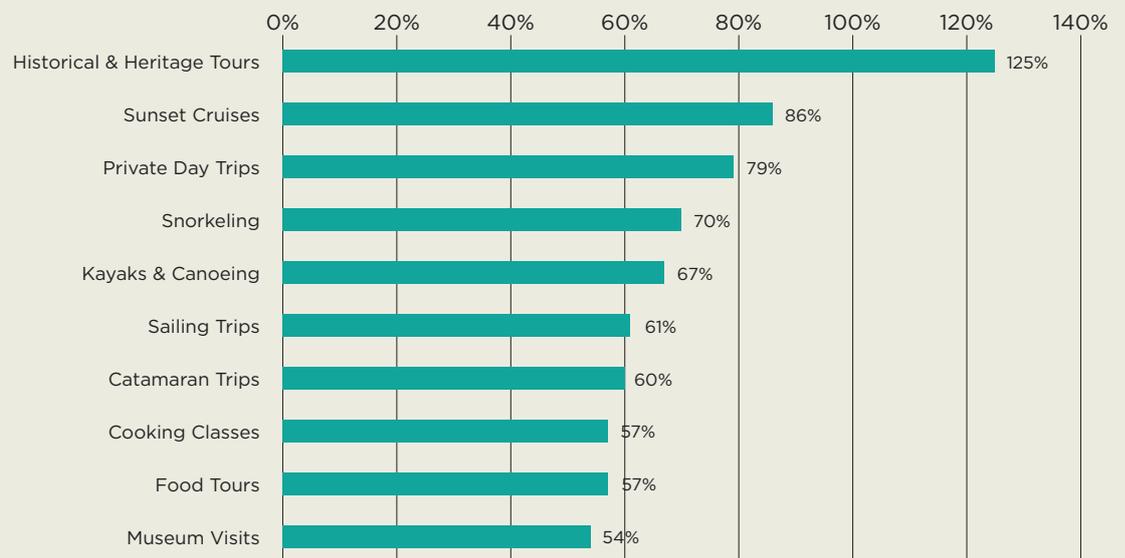
SKIFT+ EXPEDIA REPORT, NOVEMBER 2018

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Experiences Over Destinations

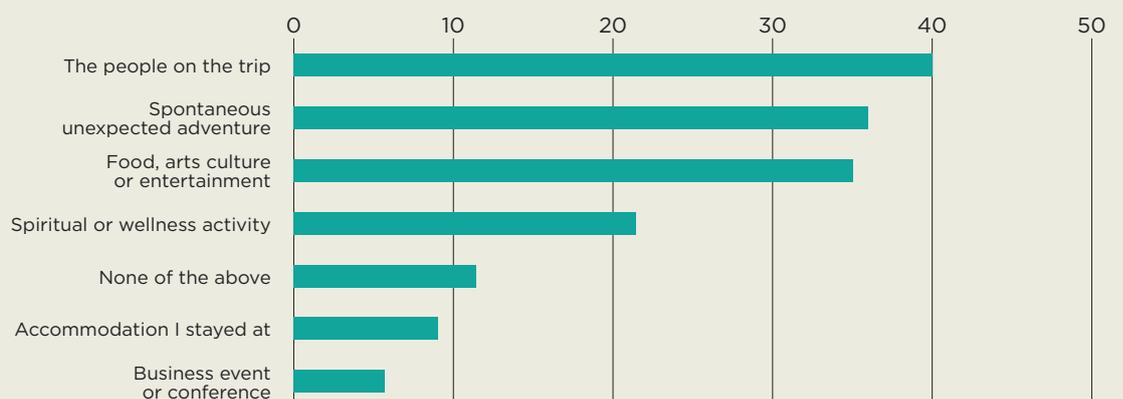
Whether it's a regional or global destination, experiences are the primary motivation for picking one destination over another.

- Interest in tours and activities has been on the rise over the last few years. However, the focus is on small-scale, immersive and locally-curated activities. A summary of growing experience categories globally is provided in Graph 1 below. Importantly for North Sydney, the most significant growth has been for the history and heritage tours. Many of the other activities that continue to increase in popularity also relate to the strengths of North Sydney, including sailing and kayaking on one of the world's most celebrated harbours. The market is seeking a more personal touch and want to feel that they are spending time with a local and not part of a group tour. These types of experiences appeal to higher-yield markets. This trend is consistent with domestic trends identified by Kantar TNS in the 2018 Domestic study.



Graph 1: Fastest- Growing Experience Categories Globally (2017)

- Another key growth area is transformative travel, which is about creating or facilitating memorable moments. Transformative travel is influenced by a range of factors, as outlined in Graph 2 below. The third most significant external factor contributing to transformative travel relates to food, arts, culture and entertainment, which is a clear strength of North Sydney.



Graph 2: SkiftX report, The Rise of Transformative Travel (2018)

- New luxury is defined by small brands with big stories. This is driven largely by the opportunity for genuine engagement and interaction with local people, nature, heritage and arts and culture. The story of the place, its people and their 'craft' is increasingly critical to the success of the experience, from artists and artisans to local sporting heroes or venues. A key to success is to consider the opportunities for more intimate or boutique experiences, from small-scale events to immersive, personalised tours.
- A major growth sector and opportunity is the well-being sector. The market is seeking destinations and experiences that support and promote well-being, active and healthy lifestyles or moments of serendipity; it's more holistic than a 'day-spa moment.' Likewise, there is an opportunity to tap directly into the market's desire to maintain their well-being while travelling through access to supporting activities and facilities. This is particularly important to support business travel and events. It relies on open space, physical connectivity, directional signage and itinerary development.

.....

According to Qantas CEO Alan Joyce, new research is showing “increased interest toward physical well-being, state of mind, and personal time and space.” It makes sense that travel will be the sector to push wellness even further.⁹

.....

- Experiences are also about great events, from festivals to local markets. Importantly, they contribute to vibrant communities, which is a significant drawcard for attracting visitors as well as business travellers. The 'festivalisation' of meetings and events continues; festivals and local events add to the excitement of a destination and its appeal to conference organisers.
- Quality food and service, especially in an aesthetic setting is increasingly important to the perception of the destination. North Sydney offers a number of settings where this trend should be further developed or promoted.

Service, Sustainability and Social Responsibility

- Destinations and operators must first differentiate on quality of service, not technology tools or peripheral activities. Quality service is increasingly expected, not something that should be celebrated.
- There is a clear and growing desire of travellers to seek destinations and experiences that support and adopt environmentally sustainable and socially responsible practices – this is no longer a so-called niche market; it appeals to broader audiences across demographic groups. Sites such as the Coal Loader demonstrate and profile the Council's commitment to sustainability.
- The future of travel is humane and compassionate. Travellers will have a more active role in curating their experiences, breaking down the status-quo in the process. This is important to travellers who want to feel welcomed regardless of their ethnicity, religion, etc. Increasingly, the market is curating their own experience and sharing it with their friends and peer groups. This trend support improving accessibility.

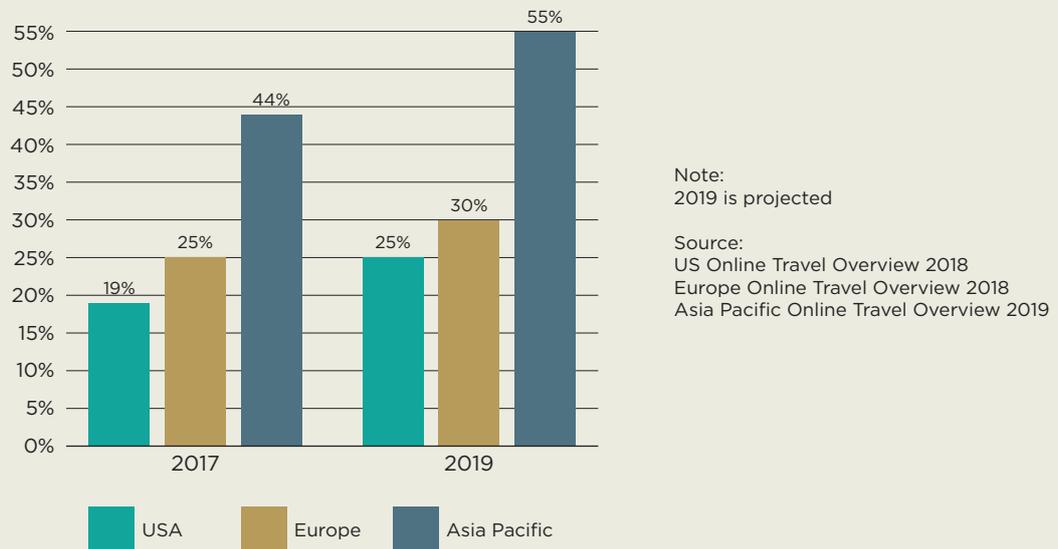
⁹ See Skift Report: <https://skift.com/2019/06/12/how-travel-brands-are-getting-wellness-right/>

Future of Digital

In a contemporary world, travellers are connected at each point along the customer journey. At the heart of this trend is the desire for personalisation, both in the way people receive information as well as how they can be involved in creating and sharing content.

- Online booking capability for experiences is increasingly essential (not just a nice idea). If there is not an easy option to book an experience or accommodation during the 'plan' or 'search' phases, then the less likely people are to choose that experience or place to stay. Recent research reveals that the share of online bookings through mobile devices continues to increase at a high rate – see Graph 3 below. This will influence the design of the online user experience into the future.

Mobile Bookings as a Share of Online Bookings in Leading Markets



Graph 3: Increasing importance of mobile for online booking

- Time well-spent is more important than time saved. As digital platforms come to mediate in-trip discovery, user experience will be crucial. Many visitors are booking experiences (from tours to restaurants) once they are in the destination – in fact, around 53% are doing so either on the day or within 7 days of the experience. Making it easy for them to do so will be vital for success. See graph 4 below.

Destination Activities booking Window Distribution



Graph 4: In-trip discovery and booking is increasingly important

- Collecting and using customer data is vital for creating customer-centric content and experiences - understanding and knowing the interests of the person (not just the broader market segment). This will help drive personalisation through enabling:
 - Co-creation of the experience - Maintaining the illusion of discovery during travel will be crucial. Co-creation is vitally important when creating online content as well as for the delivery of visitor services at every touch point, including within local Visitor Information Centres.
 - Choice - allowing for memorable moments of delight and serendipity. Access to visitor data creates the opportunity to develop content that speaks to the visitor and taps into their interest to create moments of surprise.

Business travel continues to evolve¹⁰

Four highly-relevant trends relating to business travel for North Sydney are:

- Renewed interest in face-to-face meetings, including for Small and Medium-sized Enterprises (SME) - opportunity to attract more boutique business events;
- Extending business trips for leisure is a significant trend, especially (but not exclusively) with younger business travellers (25 - 34-year olds) - so-called 'bleisure';
- Extending trips for leisure relies on a number of factors, including the appeal of the destination, such as the quality of its food, open space and experience offering and sense of vibrancy as well as the opportunities offered by hotels' loyalty programs; and
- Health and well-being is an important consideration in deciding where to stay during a business trip and can influence the decision to extend the stay for leisure.

Business travel research

International business travel to North Sydney from 2013/14 - 2017/18 represented 18.8% of overnight visitor numbers to North Sydney. This compares to the State of NSW (8.9%) and Greater Sydney (which includes North Sydney LGA - 10% of total overnight visitors).

Over the same period of time, 35% of the overnight domestic travellers to North Sydney were travelling for business compared to 26% for Greater Sydney and 18.1% of overnight visitors to the State.

The feedback from the accommodation sector at the consultation workshops also supported these statistics as midweek occupancy figures were much stronger than those on the weekend. This compares to other more traditional holiday destinations where weekends typically have a higher occupancy rate than mid-week.

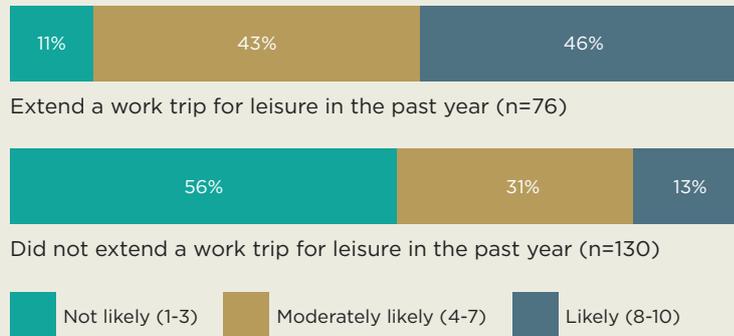
Bleisure travel, adding a leisure portion of travel to a business trip, is becoming a popular way to make the most out of business travel, with 68% of business travellers globally taking at least one bleisure trip per year (traveltalk).

This trend was also confirmed in a recent study by the Global Business Travel Association (GBTA), based in the United States of America, which found an overwhelming number of business travellers intend to or have extended their business trip for leisure. See Graph 5 below.

This trend is anticipated to only strengthen, especially given increasing interest in work-related travel for those aged between 25 - 34 years.

¹⁰ For highly-relevant trends in business travel, see: Skift and Trip Actions Report, *10 Business Travel Trends for 2019*, December 2018

Question: How likely are business travellers to extend a work trip for leisure? (Rated on a 10 point scale)



Source: CBTA 'Extending Business Travel into Leisure Time - Bleisure Study' - June 2018

Graph 5: 'Bleisure' Study

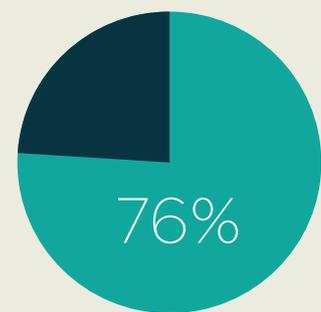
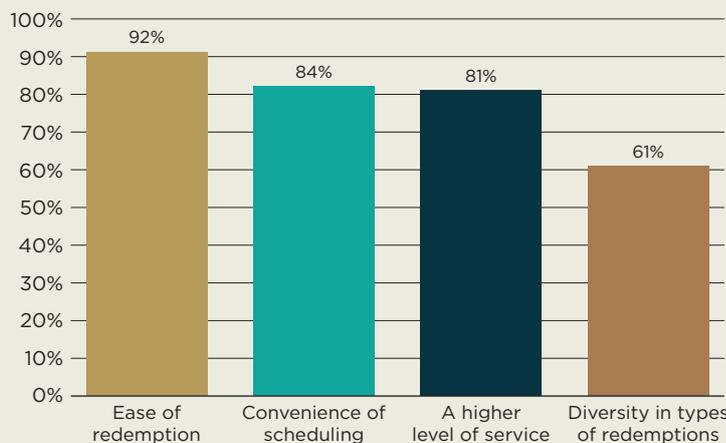
Extending length of stay for the business traveller offers a real opportunity for North Sydney Council and businesses.

A report from Skift¹¹ identified that the business traveller will extend their length of stay if the hotel loyalty program that they are signed up to can offer real benefits for extending their staying. The value-add for the guest could include experiences that the guest can only obtain through the loyalty program, which may be developed by the accommodation provider in partnership with other local businesses/ tourism operators.

Graph 6 below shows that 76% of business travellers would extend their length of stay if there was an incentive to redeem points and/or use points to gain discounts on the accommodation if they stayed longer and also have access to local experiences. An important consideration for North Sydney will be to understand how this trend can be applied beyond the hotel sector to home share accommodation (for example, Airbnb Experiences). It's worth noting that Airbnb are currently investigating the development of a loyalty program while they have also recently developed platforms for business and family travel.

Business travellers look for a lot in a loyalty program

Top aspects of loyalty programs sought after by business travellers



76% of business travellers said they would extend their business trips for leisure if their hotels offered discounts for additional nights or the chance to have a friend or family member join at a discounted rate.

Graph 6: Loyalty programs and extending business travel for leisure

¹¹ See Skift Report: *Perspectives on Hospitality Loyalty Programs 2018: A Challenging Road for Real Customer Loyalty*, April 2018

Drawing upon this research, it is recommended that the Strategy focuses on the following target markets:

- Visiting Friends and Relatives (VFR) is a significant purpose of travel for both international and domestic markets. This strength should be leveraged as a high- priority for two primary reasons:
 - It involves community engagement as it is the host (local residents and businesses) who is the key target for marketing. Importantly, this approach enables North Sydney to focus on infrastructure, facilities, activities and place activations that enhance the vibrancy of the destination for the community in the first instance; a key direction in the Community Strategic Plan. As noted above, this focus will ultimately strengthen the appeal of the destination and help attract new markets; and
 - Across Australia, local communities have demonstrated a clear preference for VFR over other tourism market segments. This relates to the perception that their peer group and those of other community members will be more respectful and generally 'better visitors.'
- Business travel is also a strength of the LGA, including for both international and domestic markets. This offers three key opportunities:
 - A significant global trend in business travel is to extend the length of stay through adding time for leisure ('bleisure'). This includes arrangements for partners and/or families to join the business traveller for leisure time;
 - Potential to leverage both existing businesses and sectors to attract business events and conferences, including more bespoke or boutique-style events linked to innovative industries or designed to attract new businesses or sectors, including delivering on the Council's smart city initiative; and
 - Business travellers are attracted to more vibrant destinations. This supports a focus on strengthening the night-time economy and weekend activations, especially important given the average length of stay of international visitors is higher than the NSW average.
- Higher-yield markets, especially the 55+ and contemporary women travellers (often overlapping), offer an important opportunity for North Sydney to ensure tourism isn't positioned as being about more visitors. Instead, the focus is on delivering improved results for the visitor economy through attracting higher-yield markets. A critical issue will be to consider the experience offer and accommodation to more effectively meet the expectations of and attract these markets. Health and well- being, including access to open space is also important.

APPENDIX 3

PRODUCT AND EXPERIENCE AUDIT



Sydney Restaurant Group – Ripples Milsons Point

An online audit of the products and experiences of North Sydney has been undertaken. The primary purpose is to understand what the visitor or prospective visitor will find during the ‘dream and plan’ phases of the customer journey.

Given that online and digital channels now dominate consumer search with regard to destinations and tourism more broadly, an understanding of the availability or access to the product and experience offering through these channels is critical to inform the Strategy.

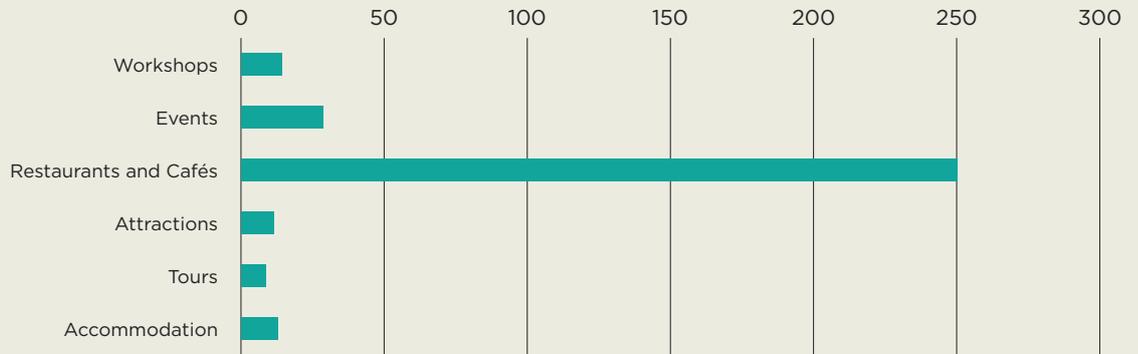
The main sources of information included:

- ATDW
- TripAdvisor
- Online travel agents (OTAs), including HotelsCombined and Airbnb (accommodation and experiences)
- Google Search

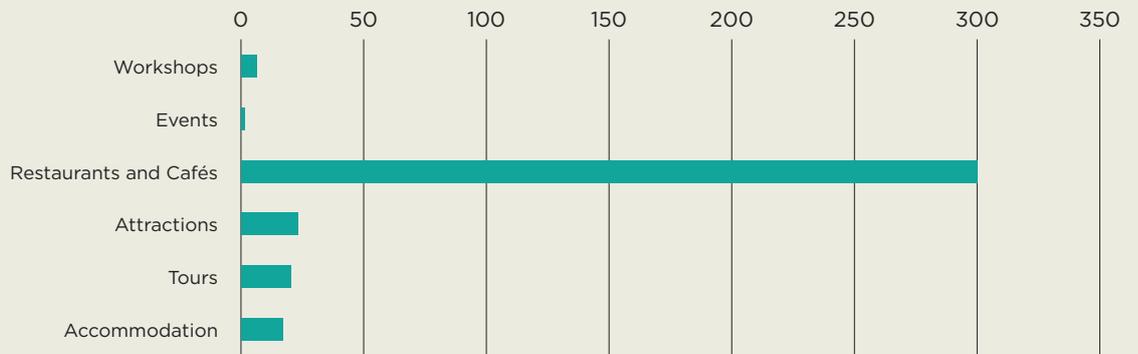
Below is the number of products listed under each category for ATDW and TripAdvisor. ATDW generally had more products listed. Many of the products listed on TripAdvisor are not specifically located in the North Sydney LGA. However, they are accessible to visitors staying in the LGA. There is an opportunity to work with industry to create greater presence of the offering on TripAdvisor, especially given that TripAdvisor is a leading global platform for research (dream and plan phases) for the visitor. There is also a need to engage with the industry to improve customer engagement on TripAdvisor.

Airbnb did not have any experiences listed specifically for the North Sydney LGA; this represents an opportunity to encourage the development of new, small-scale and locally- curated experiences to increase product listings on this platform.

The biggest category on ATDW and TripAdvisor was cafés and restaurants, some of which were located in suburbs just outside the LGA. However, on closer examination, while the listing is very comprehensive (includes coffee shops and sandwich stops) it has become cluttered with content that isn’t particularly adding value to the perception of North Sydney as a quality destination.

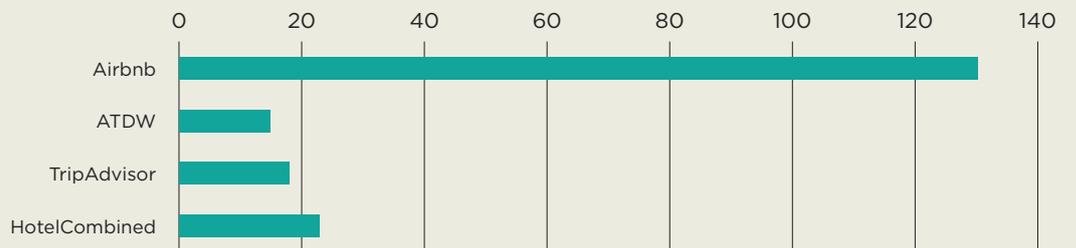


Graph 7: ATDW listing for North Sydney LGA



Graph 8: TripAdvisor listing for North Sydney LGA

Not surprisingly, Airbnb had the greatest listing of accommodation for the North Sydney LGA. The number varied based on filters and locations. However, using the filter of North Sydney and excluding properties listed outside the LGA, there appears to be approximately 130 listings. Commercial accommodation, such as hotels, are very limited, which could provide an opportunity to encourage more commercial accommodation, in particular for a more upmarket and guesthouse style of experience in keeping with the perception of North Sydney.



Graph 9: Accommodation listings

Very few tours were identified that included North Sydney LGA in their itineraries. There are some water-based activities such as kayaking, boating etc that are listed on ATDW. However, there is very little in the way of experiences, classes or workshops offered on TripAdvisor when searching any suburbs located in the North Sydney LGA. This also presents an opportunity for the industry and Council to work in collaboration to encourage experience development. This could also include community-based workshops such as art classes and yoga.

Summary of North Sydney's Experience Offering

When undertaking the audit there were a number of categories used as search terms on each of the platforms, specifically accommodation, café/restaurants/wine bars, attractions, tours, workshops and events. An overview of the results is provided below, including some high-level insights into opportunities to improve the perception of North Sydney as a vibrant and socially-connected community worth visiting.

Accommodation: HotelsCombined has the largest list of commercial accommodation providers. This includes traditional 3 - 4-star hotel chains such as Rydges, Quest and luxury serviced apartments (such as Meriton) along with a smaller chain Emerald City Hotels, which offers four boutique-style heritage hotels and lodges. There is a distinct shortage of more boutique hotels and accommodation for North Sydney. Specifically, hotels that offer intimate communal spaces that also are inviting for the local community to access and would bring a sense of vibrancy and locality to the property. There are no youth hostels or backpackers located within the North Sydney LGA.

Attractions: There is a comprehensive list of attractions in North Sydney such as Luna Park and the North Sydney Olympic Pool along with other key attractions. On platforms such as TripAdvisor there are listings for other attractions such as nature parks and reserves, Coal Loader, Wendy Whiteley's Secret Garden and Mary MacKillop Place, among many others. However, what is missing is the experience that the visitor can have when visiting those specific sites. In addition, the other missing element relates to connectivity between the sites, which would value-add to the overall perception of North Sydney. The market is seeking more immersive experiences to gain a sense and a deeper connection to the place they are visiting, therefore experiences are important. There are a number of kayaking opportunities across Sydney Harbour and include the foreshore area of North Sydney. However, they are not easy to find online when searching for things to see and do in North Sydney or by suburb names within the LGA.

Tours: There are about 20 tour operators that are profiled when searching North Sydney. However, many do not offer any tours that are related to the North Sydney area. There are about seven operators that do include an aspect of North Sydney on their itineraries. There is not a tour or experience that is exclusively designed for North Sydney. The tours that do include North Sydney use it more as a location to look back at the Sydney CBD and the icons (e.g. Opera House and Harbour Bridge) as opposed to spending time in North Sydney to uncover its hidden treasures or opportunities to spend money locally. Within Greater Sydney, there has been prolific growth of tour operators such as Culture Scout Walking Tours¹² and Splendour Tailored Tours¹³ who create bespoke and interest-based walking tours and provide the visitor with the ability to get 'under the hood of a destination.' At this point in time, North Sydney isn't included in the itinerary options for these companies and represents a significant opportunity to reposition the perception of the area's visitor experience.

Restaurants/Cafes/Wine Bars: As mentioned above, there is a long list of eating and dining opportunities provided on many platforms. However, there is an opportunity to seek out and profile those experiences that highlight the best of North Sydney. For example, greater emphasis needs to be placed on those food and drink experiences that utilise their location, whether that is a view of the Harbour or nature reserve; are co-located with another experience such as art, theatre or sustainability showcase; or offer a roof-top bar experience. When searching for roof-top bars specifically, four in the North Sydney CBD come up. However, when looking at their individual websites it is not at all clear if there is a roof-top bar or not. The other opportunity is the utilisation of pop-up bars, for example the pop-up bar at the Coal Loader is an excellent way to profile the location and the sustainability merits of the site. Currently, the opportunity to entice local residents, workers and visitors to enjoy these sites is either poorly promoted or hidden. This undermines the sense of vibrancy that North Sydney could provide.

12 See: Culture Scouts at <https://www.culturescouts.com.au/>

13 See: Splendour Tailored Tours at <https://www.splendourtaioredtours.com.au/>

Workshops: A clear global and domestic trend relates to workshops that allow locals or visitors to enjoy a more-immersive experience of a place, explore their sense of creativity and engage with local artisans. This is not about education but instead is about inspiring people to learn or find out more about a topic for which they are passionate. There is very limited listing of available workshops in the North Sydney area. The Sydney Cooking School at Neutral Bay offers many workshops or master-classes. Notwithstanding the additional information under Events below, there is a significant opportunity to activate sites across North Sydney by engaging with local artists, artisans and heritage or sustainability experts (etc) to develop more experiences of this type.

Events: Very few events were listed for North Sydney when searching commercial platforms. However, a Google search returned the North Sydney Council website at the top of the results. On further examination, the Council's website lists many Council-run or community events and workshops. Many of these could also be profiled through Airbnb experiences and TripAdvisor, integrated into self-guided itineraries or as part of a tour or promoted by the commercial accommodation operators. This would assist in providing more reasons for guests and visitors to visit or increase the length of their stay. It is worthwhile noting that the Council's What's On page is not easily navigated for the visitor and the content is clearly provided primarily for local residents.

Geographic dispersal: In undertaking the audit, it became clear that the geographical dispersal of the accommodation, attractions and restaurant offering of North Sydney is clustered around certain hubs within the LGA. Specifically, commercial accommodation is predominately located around the North Sydney CBD while attractions dominate the harbour foreshore. Restaurants and cafes are primarily found around the three hubs of North Sydney CBD, Crows Nest and Neutral Bay. The implication of this finding is that there is limited geographic dispersal of the experience offer across the North Sydney LGA.

Mary MacKillop's Place - Mary MacKillop's Place



APPENDIX 4

STAKEHOLDER CONSULTATION



Jacquie Manning - May Gibb's Nutcote

Stage 1

This Strategy has been informed by a two-stage engagement program. Stage 1 included a community survey, and a series of workshops and meetings. Stage 2 included the public exhibition of the Strategy and feedback from the community.

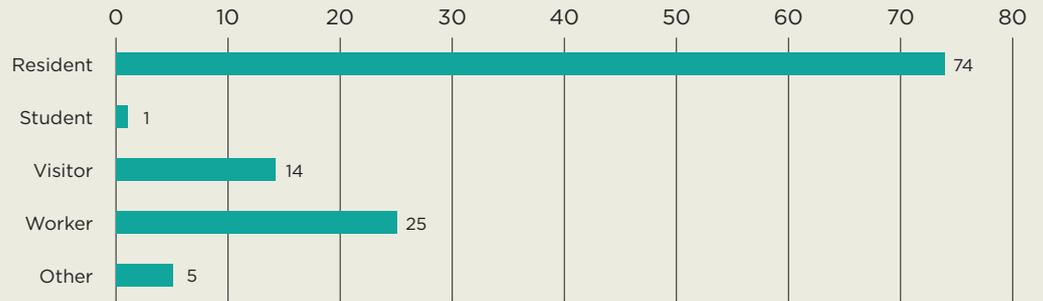
Council undertook the Stage 1 consultation in May 2019, including:

- Online and paper-based survey – open to all stakeholders (119 respondents)
- Submissions – online and written (4 submissions)
- Business Workshop 1 – by invite only, targeting local tourism operators (9 participants)
- Business Workshop 2 – by invite only, targeting local tourism operators (11 participants)
- Community Workshop – open to all stakeholders, including business and residents (7 participants)
- Precinct Committees Workshop – by invite only, (16 participants from 10 Precinct Committees)
- One-to-one and small group meetings, including:
 - Councillor Briefing
 - Project Control Group (Council staff only)
 - Destination NSW
 - Hayden Orpheum Picture Palace
 - Bondi to Manly Walk
 - Aboriginal Heritage Office
 - Ensemble Theatre
 - Hammons Holdings – Bridge Climb
 - Gaimaragal Festival
 - Mosman Council

Community Survey Findings

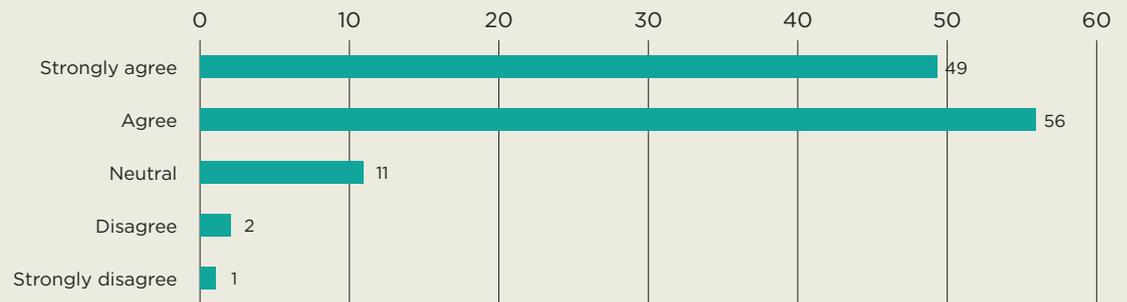
In total, 119 people responded to the community survey, of which around 62% were residents, 21% workers and 12% visitors to North Sydney.

Profile of Survey Participants



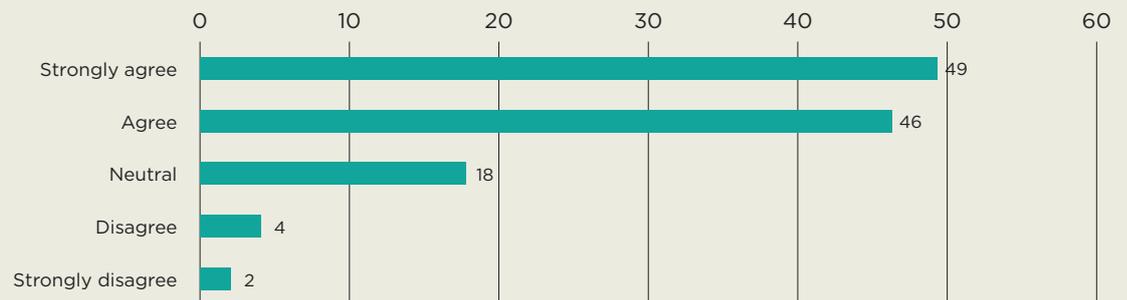
The results of the survey are presented below.

Question 1: There is an opportunity to grow tourism in North Sydney



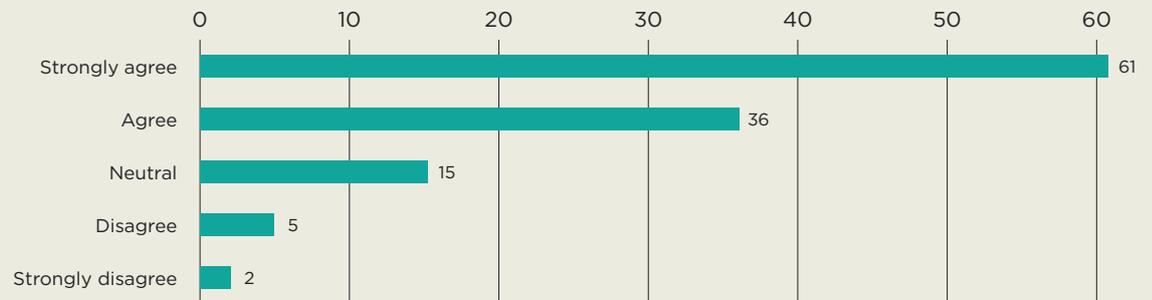
Over 88% either agree or strongly agree that there is an opportunity to grow tourism in North Sydney.

Question 2: North Sydney is an attractive place to visit



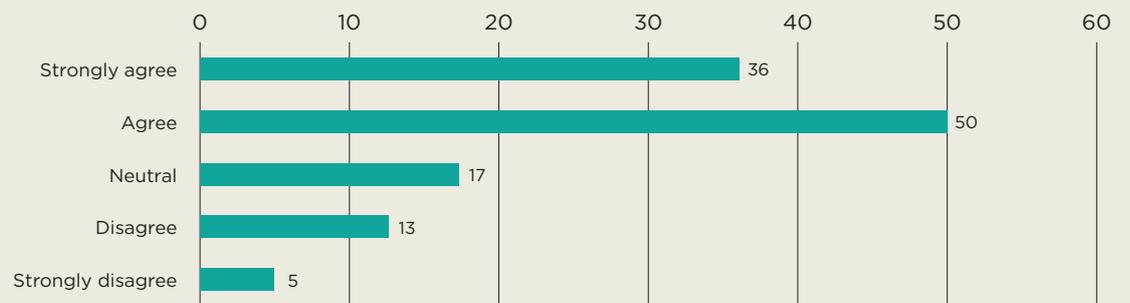
Around 80% either agree or strongly agree that North Sydney is an attractive place to visit. Only 5% disagreed or strongly disagreed with this statement.

Question 3: North Sydney should develop a more vibrant night time economy



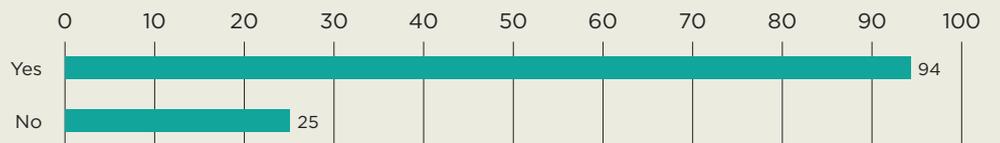
Around 82% either agree or strongly agree that North Sydney should develop a more vibrant night time economy. This question elicited the highest 'strongly agree' response of all questions.

Question 4: Tourism opportunities should be dispersed across the whole of North Sydney

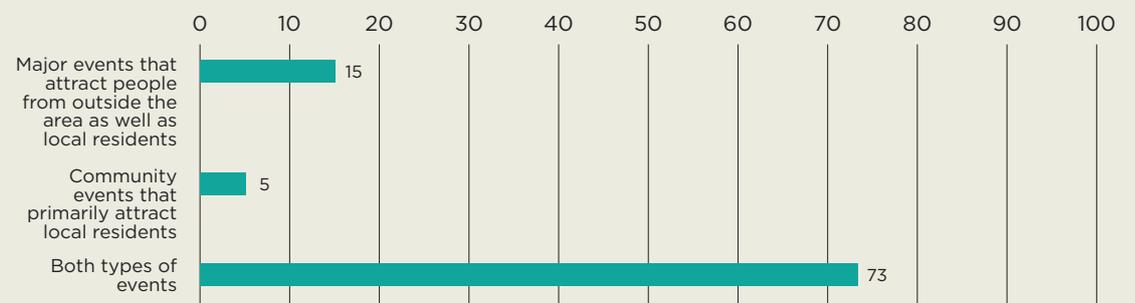


Around 70% of respondents either agreed or strongly agreed with increased dispersal of tourism across the LGA while 15% either disagreed or strongly disagreed.

Question 5: North Sydney needs more events

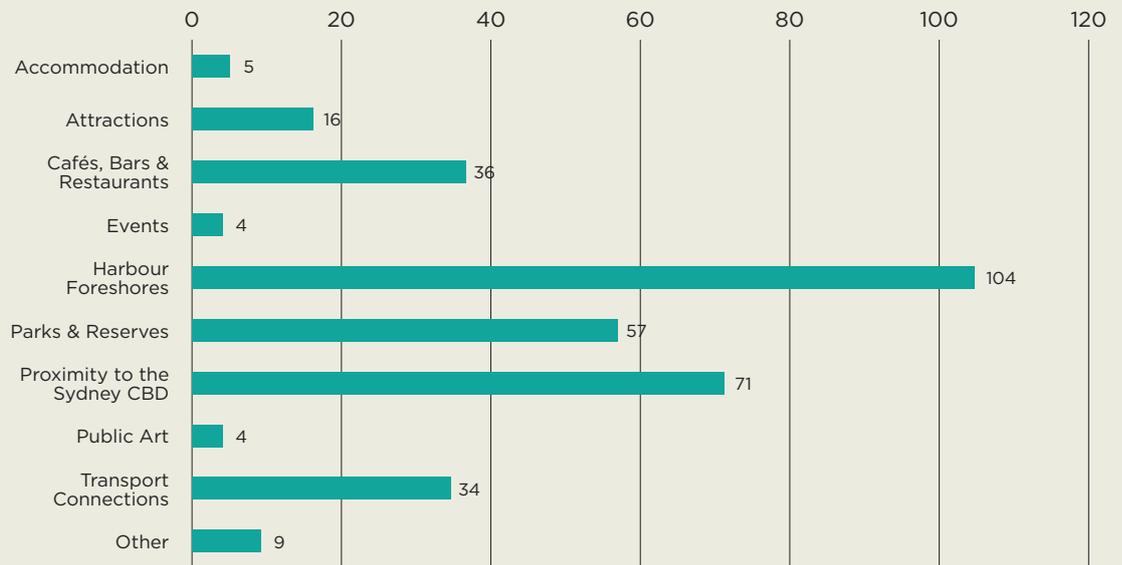


Around 79% agreed that North Sydney needs more events.



There was also a clear preference for a mix of major events and community events.

Question 6: What is most attractive about North Sydney to visitors?



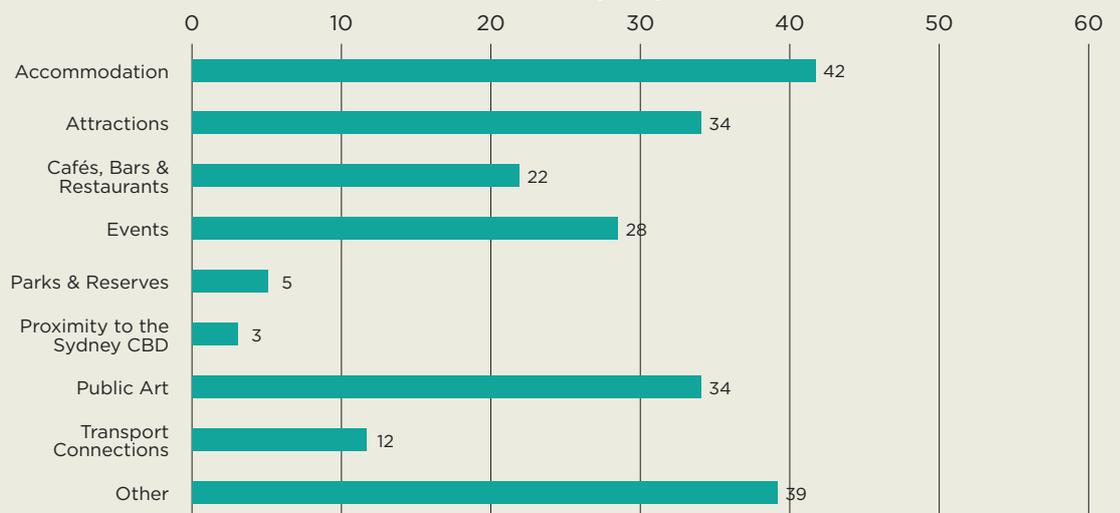
This question was designed to seek insights into what the residents and workers think are some of the most attractive aspects of North Sydney. The top three results¹⁴ are:

- Harbour foreshores (31%)
- Proximity to Sydney CBD (21%)
- Parks and reserves (17%)

It is worth noting that these are likely to be quite different to the perception of visitors or aspects that would actually attract potential visitors.

The total number of responses to this question = 340

Question 7: What is least attractive about North Sydney to visitors?



Likewise (to question 6), these results provide an insight into the challenges facing North Sydney as a visitor destination. The highest responses¹⁵ relate to:

- Accommodation (19%)
- Other (18%) – see below
- Attractions (15.5%)
- Public Art (15.5%)

The total number of responses to this question = 219

A significant number of comments relating to 'Other' were about the North Sydney CBD, including 'wind tunnels', over-development and high-rise, construction, traffic and lack of parking. A further area related to the lack of connectivity within and across the LGA.

The results, in particular responses and comments relating to Questions 6 and 7 are reflected in the SWOT analysis provided below.

The workshops, one-to-one and small group meetings involved the following participants:



Jason Busch - Lavender Bay



SWOT Analysis Based on Stage 1 Consultation

The feedback, insights and results of the community survey from the consultation process have been organised to reflect the stakeholders' perception of North Sydney's strengths, weaknesses, opportunities and threats/challenges of the LGA.

STRENGTHS

- The 'natural beauty', including walking trails and open space such as Balls Head and many other parks
- Geographic location of the LGA along the harbour foreshore - 'the dress-circle of Sydney Harbour' - from the icons to the history of a working harbour
- Living heritage - there are an array of iconic, heritage-listed buildings and places of significance throughout the North Sydney LGA; as well as a range of characters and stories to share. For example:
 - Luna Park
 - North Sydney Oval
 - North Sydney Olympic Pool
 - The Harbour Bridge
 - Coal Loader
 - Mary MacKillop Place
 - May Gibbs' Nutcote
 - HMAS Platypus - *Sub Base Platypus*
 - Don Bank Museum
 - St Thomas' Rest Park and Sexton's Cottage Museum
- Creative and cultural experiences (and stories), from Wendy Whiteley's 'Secret Garden', Australia's longest running and most successful professional theatre company, Ensemble Theatre, to Nutcote, Mary MacKillop Place, the North Sydney Public Art Trail and North Sydney's Aboriginal history
- North Sydney LGA contains a variety of precincts or villages offering different experiences
- Access to:
 - the Sydney CBD and key Sydney landmarks (Opera House, Harbour Bridge, The Rocks, and Sydney ferries)
 - the landmarks and attractions in other neighbouring LGAs including Taronga Zoo, Balmoral and Bradleys Head (Mosman LGA), as well as the Concourse (Willoughby LGA) and Greenwich Baths (Lane Cove LGA)
- North Sydney contrasts and complements the Sydney CBD

WEAKNESSES

- Future budget available for marketing North Sydney needs to be clarified or confirmed and limited collaboration to date between Council and industry to strengthen awareness and appeal of North Sydney
- Connectivity:
 - lack of physical and directional signage connectivity between experiences, villages and centres and walking trails – it is noted that while there are already some beautiful walks throughout the LGA, there is little information on how to access them or how they connect with the villages and experiences of North Sydney.
 - interpretive connectivity between the North Sydney identity/narrative and the destination's experiences – missed opportunity to bring the stories of North Sydney to life
 - infrastructure/transport connectivity between LGA villages
 - 'hop-on/hop-off' mini bus service that complements a community bus service for residents
- Destination identity – the destination is a bit invisible and forgotten. It lacks a clear, competitive and compelling identity and image.
- More a commuter and work destination than a visitor destination
- The 'north snore of the north shore.'
- To appreciate what the destination has to offer and to improve the visitor experience people need to be simultaneously guided around and inspired by the destination, which needs to 'ladder' back to reinforcing the destination identity. An identity that is credible for the destination, competitive against other destinations people can choose to stay in and/or visit and compelling for our key audiences.
- Significant challenges associated with the North Sydney CBD, including 'wind tunnels', over-development, construction, traffic congestion and lack of parking.
- Key parts of the LGA, North Sydney CBD for example, lack a sense of vibrancy.
- Regarded as a bit of a 'ghost town', particularly at night and on the weekends
- Limited night time economy (important to the business traveller)
- Perceived weakness is the accommodation offer, especially relating to hotels.
- Lack of soft infrastructure, for example toilets, signage (directional and signage), rest stop facilities (park benches and tables) and transport (hop on/off buses)
- Poor visitor dispersal across the LGA. Dispersal seems to be limited by three things:
 - Transport
 - Knowledge of what there is to see and do
 - Experience offering throughout the LGA and beyond the icons

OPPORTUNITIES

- Destination identity – consensus of most stakeholders was that North Sydney definitely had a lot to offer (in other words the potential to have a strong destination identity). Furthermore, the stakeholder feedback was very consistent in terms of what the story should or could be about in terms of the destination's overall positioning. This commonly revolved around North Sydney being creative, 'arty', cultural, historical, heritage, interesting (the stories), peaceful and natural. All consistent, positive descriptors.

The issue is that no-one is collecting and curating the various stories the destination has to tell and translating them into interesting and cohesive marketing activity.

- Developing new and revitalising existing heritage assets, open space and experiences. For example;
 - Bondi to Manly Walk and importantly, leveraging North Sydney' position as the half way point in the walk
 - Sub Base Platypus while being led by SHFT, this provides opportunities for greater collaboration, promoting the LGA including activations and events as well as integrating it into a more-connected North Sydney
 - the SHHL project – involving linking east-west along the harbour foreshore, including to the North Sydney CBD, Harbour Bridge and the Bondi to Manly Walk as well as west to the Waverton Peninsula, the Coal Loader and Berry Island Reserve
 - the Coal Loader – new activations and events
 - supporting the opening of north-side access for Bridge Climb on the Harbour Bridge
 - sporting and recreation sites, such as North Sydney Oval and North Sydney Olympic Pool
- There is a potential opportunity to do more adaptive reuse of heritage sites similar to the revitalisation of the Coal Loader, which also demonstrates the Council's commitment to sustainability. An initial step would be to review the Council's heritage assets to determine suitability and feasibility for adaptive reuse.
- Greater visitor dispersal:
 - more clearly define the offer and benefit delivered by the diversity of sub- destinations (making North Sydney LGA a collection of distinct villages rather than one homogenous mass), which is potentially good for visitor dispersal
 - signage (directional and interpretive) to help connect different experiences and deliver a better visitor experience:
 - create a range of interpretive signage stories. For example, North Sydney Olympic Pool holds the world record for the pool where the most world records were broken
 - create and distribute suggested walking itineraries
- Activate Industry – use local businesses and Airbnb as a visitor information distribution network, including activations with hotel concierge
- Stronger engagement with the workforce and businesses for leisure time – both permanent and visiting workers
- Review and implement the draft North Sydney Council *Events Strategy*, including to assist revitalise the North Sydney CBD

THREATS/CHALLENGES

- Managing the relationship between locals and visitors:
 - critical to have ongoing community engagement and build support for tourism
- Lack of a clear, competitive and compelling destination identity
- Lack of activation and implementation resources and budget
- Low visitor dispersal
- A perceived lack of interest and commitment of Council in the visitor economy
- Perceived view that North Sydney LGA is 'too far away' from the Sydney CBD – undermines proximity and accessibility. Likewise, the perceived lack of connectivity between experiences, precincts and villages undermines interest in activities and the hospitality sector, from attending the Ensemble Theatre to a more active night-time economy
- Over-tourism in some areas and at some periods of the year for example, for events such as New Year's Eve and Jacaranda season

Stage 2

Public exhibition of the draft Strategy and Action Plan (Stage 2 consultation) occurred in September/October 2019. All Stage 1 participants were informed of the opportunity to provide feedback, and promotion via social media reached almost 9,800 people. Over 50 submissions were received, including from partners/tourism operators, community groups, Precinct Committees and residents.

Overall, most of the submissions were supportive of the draft Strategy and Action Plan. The feedback is summarised as follows:

- need to balance the development of the North Sydney LGA as a tourism destination with the potential for commercialisation, particularly at the Waverton Peninsula;
- need to balance the growth of food and drink establishments and the night time economy, against residential amenity;
- potential benefits of the SHHL, for example to link existing open spaces, provide views and encourage healthy lifestyles, plus some concerns about the project, including Council's role;
- potential to improve cycle routes in the North Sydney LGA;
- potential to improve Aboriginal cultural tourism in the North Sydney LGA;
- important role of digital marketing;
- recognition of the important role existing tourism products and experiences play, including Luna Park, Bradfield Park and the harbour foreshores, and placing these with new products and experiences.

Hayden Orpheum Picture Palace - Hayden Orpheum Picture Palace

