

31<sup>st</sup> MAY 2019

# Report on Initiatives to Enhance Regional Tourism



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# 1. Executive Summary

## 1.1. Key Objectives

This Report details the initiatives undertaken by Sydney Zoo Pty Ltd (the **Applicant**) to enhance regional tourism in conjunction with the construction and operation of Sydney Zoo (the **Development**). The ultimate aim of these initiatives is to make a material contribution to **growing the Western Sydney Visitor Economy** which is key in meeting the NSW Government's goal of **doubling overnight visitor expenditure by 2020**<sup>1</sup>.

Destination NSW (**DNSW**) has identified a number of specific roles for industry<sup>2</sup> required to achieve this objective. These roles are summarised in the table below together with relevant examples of contributions made by the Applicant to date.

Role of Industry	Applicant's Key Contributions
Committing to a single strategy and plan to maximise the potential through a cohesive approach to the management and promotion of Western Sydney as a destination	<ul style="list-style-type: none"> <li>Established the Tourism Business Leaders Think Tank: A multi-party conference to promote collaboration and joint efforts to grow the Western Sydney Visitor Economy</li> </ul>
Partnering with Government to deliver the Western Sydney Visitor Economy Strategy	<ul style="list-style-type: none"> <li>Co-funded development of Sydney's West app with Western Sydney Business Connection</li> </ul>
Addressing skills gaps across the visitor economy by facilitating skills development and training	<ul style="list-style-type: none"> <li>Delivering ■ scholarships and ■ internships in tourism and zoology in partnership with Western Sydney University at a cost of ■■■■■</li> </ul>
Investing in product development and upgrading existing infrastructure	<ul style="list-style-type: none"> <li>The Development is a significant new recreational product offering for Western Sydney and has been recognised by DNSW as a "game changing" opportunity for Western Sydney</li> </ul>
Prioritising better packaging of Western Sydney products and experiences to encourage the travel trade to sell and promote the destination and for visitors to consider multiple experience options to explore and enjoy	<ul style="list-style-type: none"> <li>MOUs signed with 9 tourism businesses in Western Sydney to offer joint ticketing to retail and wholesale markets, information sharing and promotional cooperation to generate improved critical mass in the Western Sydney Tourism market.</li> <li>Working with ■■■■■ and ■■■■■ to jointly market the Development and their attractions internationally as the <i>Sydney Iconic Experience</i></li> </ul>

<sup>1</sup> Western Sydney Visitor Economy Strategy 2017/18 – 2020/21 at page 3.

<sup>2</sup> Ibid at page 8.

<p>Actively participating in trade marketing programs and supporting consumer marketing programs</p>	<ul style="list-style-type: none"> <li>• Sydney Zoo is a participant in the Australian Tourism Exchange (ATE) - Australia's largest annual travel and tourism business-to-business event.  Sydney Zoo has offered a nett rate to wholesalers for the purposes of packaging Sydney Zoo with other accommodation and attractions in the Sydney Region. Sydney Zoo is also actively marketing overseas in conjunction with [REDACTED] and [REDACTED] to offer scale and critical mass for [REDACTED]. Sydney Zoo is exhibiting at the ATE to announce the arrival of our product and all markets are being offered a nett rate for the purposes of packaging our product.</li> <li>• Other tourism promotion events that Sydney Zoo has or will be involved in to promote tourism to the Western Sydney region include:             <ol style="list-style-type: none"> <li>1. DNSW. May 18 UK Europe sales Mission</li> <li>2. TA Aug 18 Indian Travel Mart India Jaipur</li> <li>3. DNSW Nov 18 China travel Mission Xian</li> <li>4. DNSW March 19 Focus on India workshop Sydney</li> <li>5. TA April ATE Perth</li> <li>6. DNSW May Focus on Japan Sydney</li> </ol> </li> </ul>
<p>Delivering quality corporate, leisure, event and education experiences to visitors to Western Sydney</p>	<ul style="list-style-type: none"> <li>• Co-hosted RunWest in March 2019 and next 4 years – with Sydney Zoo forming a key highlight of the running course; this event is expected to attract up to 9,000 runners in its inaugural year (See Case Study - Appendix K)</li> <li>• Developing Sydney's only integrated Aboriginal education program for primary and secondary schools in partnership with [REDACTED]</li> </ul>

Table 1: Summary of Sydney Zoo contribution to DNSW strategic Objectives for growing Western Sydney Tourism

## 1.2. Condition C9

This Report is submitted to the Secretary of the Department of Planning and Environment (**Secretary**) pursuant to Condition C9 of the State Significant Development Consent 7228 (**SSD 7228**) for the Development.

Sections 4 to 8 of the Report provide detailed information in relation to each of the specific matters required to be addressed by Condition C9. A summary of the initiatives undertaken by the Applicant and outcomes achieved to date is provided below. In many cases, the initiatives are ongoing and will be advanced further once the Development is operating.

**How will the operation of the Development differ from existing recreational facilities and businesses? (Section 4)**

The Development will be the only zoological facility with both an exotic and Australian animal offering located in Western Sydney. As such, the Development will introduce a new and unique recreational product offering to Western Sydney which currently can only be accessed by travelling 50km to Taronga Zoo in Mosman.

The Development is located near several major recreational facilities including Wet ‘n’ Wild, Sydney Motorsport Park, Western Sydney Parklands, Blacktown International SportsPark and West HQ. The Development is highly complementary to these facilities in terms of its significantly differentiated product offering, appeal to families and proximate location.

Having regard to the animal collection, design and display strategies, visitor amenities and overall scale of the facilities, the Development will provide a visitor experience that is meaningfully differentiated from that of Featherdale Wildlife Park (**Featherdale**).

This is further reinforced by a number of conditions of consent included in SSD 7228 that ensure that the operation of the Development will differ from Featherdale:

CONSENT CONDITION	DESCRIPTION	DIFFERENTIATION
B6	<ul style="list-style-type: none"> <li>• Display of Australian native animals to comprise less than 1.6 hectares</li> <li>• Australian native animals to be displayed as part of an Aboriginal Cultural Experience</li> <li>• Australian native animal display to include from the commencement of opening to the public an Aquarium, Reptile House and Insectarium and Nocturnal House</li> </ul>	<ul style="list-style-type: none"> <li>• The Australian native animal display area will be a minor proportion of the Development’s total display area ensuring that the Development’s overall visitor experience will have an emphasis on exotic animals.</li> <li>• The Australian native animal display area of the Development will be smaller than that of Featherdale.</li> <li>• The display of native Australian animals in the context of an Aboriginal Cultural Experience will be a unique feature of the Development’s exhibit ensuring that it offers a different visitor experience to that of Featherdale.</li> <li>• The inclusion of an Aquarium and Insectarium in the Development’s Australian native animal display will ensure that the Development exhibits species that are not included at Featherdale (which does not have an aquarium or insectarium).</li> </ul>
B7	For the commencement of opening to the public the Development must have for display to the public at least two-thirds of the exotic species nominated in the Additional Information.	This condition will ensure that the Development does not open as an Australian native-only facility like Featherdale.
B8	For the first 3 years after opening to the public, the Applicant is prohibited from having Interactive Programs that involve touching a koala except as part of demonstrations in the educational	A key feature of the Featherdale offering is interactive experiences involving the opportunity to touch koalas. This condition ensures that the Development will not offer this visitor experience in the first 3 years of its operation.

	amphitheatre or provided in the context of education of school groups	
B9	The exhibition of birds at the Development is limited to ratites (flightless birds) and penguins only	Birds comprise a majority of the Featherdale animal collection. This condition ensures that there is further differentiation between the animal collections of the two facilities.

Table 2: Structural differentiation of Sydney Zoo inherent in consent conditions

**What consultation has the Applicant undertaken with local recreational facilities and businesses? (Section 5)**

**What initiatives has the Applicant implemented to encourage and enhance continued operation in conjunction with local recreational facilities? (Section 6)**

The Applicant is actively engaged with a wide range of local recreational facilities and businesses as well as a number of private and government organisations that have an interest in promoting tourism in Western Sydney. The objective of this engagement is to **develop joint initiatives that will drive growth in the Western Sydney Visitor Economy.**

The engagement initiated by the Applicant since obtaining its Development Consent has been focused on collaboration with tourism businesses. Key collaborative initiatives include:

1. **SPONSORSHIP RIGHTS + SIGNAGE**
  - through this initiative partners provide public recognition of their alignment with other facilities within the region. This recognition supports the creation of the tourism cluster which will help drive a positive impact on demand for the destination.
2. **JOINT TICKETING**
  - the joint ticket programs involve the offering of tickets to 2 or more venues to both wholesale and retail markets, thereby contributing to raising the appeal of the region as a tourism destination. Packaging products provides the opportunity for tourism routes and itineraries to be created which can lead to increasing the length of stay within the region. The Applicant and our partners (listed in the table below) have agreed to bundle the respective products into a single package thus providing visitors with a greater breadth of choice at a discounted rate.
3. **SHARED MARKETING ASSETS (DATABASE SHARING, CONTENT SHARING, RECIPROCAL SOCIAL MEDIA POSTS)**
  - raising awareness and improving the perceptions of Western Sydney are critical to successfully growing the visitor economy. The Applicant and our partners have agreed to share marketing assets to help create brand recognition and advocacy of the region which will strengthen the brand identity for Western Sydney. Increasing the awareness of the breadth of choice within the region subsequently creates a stronger preference for a visitor to travel to the region.



#### 4. EVENT COLLABORATION

- ongoing development and greater funding of the major events sector is key to the growth of the Western Sydney visitor economy. The Applicant and our partners have agreed to create new major events for the region. This initiative has already had a demonstrated impact on Western Sydney with the successful running of RunWest.

A significant achievement by the Applicant has been the establishment of the Tourism Business Leaders Think Tank – a multi-party conference to promote collaboration and growth of the Western Sydney Visitor Economy. Ten parties attended the first Think Tank which was held in December 2018 and it is expected that this will be a semi-annual event. See Case Study – Appendix K for a detailed description of this initiative.

This semi annual initiative has improved the networking and coordination of facilities across Western Sydney, with Wet N Wild seeking to host the next Think Tank in [REDACTED]

The table below summarises relevant engagement undertaken by the Applicant with various parties:

	SPONSORSHIP RIGHTS	JOINT TICKETING	DATABASE SHARING	CONTENT SHARING	RECIPROCAL SOCIAL MEDIA POSTS	SIGNAGE	EVENT COLLABORATION
[REDACTED]	✓	✓	✓	✓	✓	✓	✓
[REDACTED]	[REDACTED]						
[REDACTED]	✓	✓	✓	✓	✓	✓	✓
[REDACTED]	✓	✓	✓	✓	✓	N/A	✓
[REDACTED]	[REDACTED]						
[REDACTED]	✓	✓	✓	✓	✓	✓	✓
[REDACTED]	[REDACTED]						
[REDACTED]	N/A	N/A	✓	✓	✓	✓	✓
[REDACTED]	✓	✓	✓	✓	✓	N/A	✓
[REDACTED]	✓	✓	✓	✓	✓	✓	✓
[REDACTED]	✓	✓	✓	✓	✓	✓	✓
[REDACTED]	✓	✓	✓	✓	✓	✓	✓
[REDACTED]	✓	N/A	✓	✓	✓	✓	✓
[REDACTED]	[REDACTED]						
[REDACTED]	✓	✓	✓	✓	✓	✓	✓

■ Accepted   
 ■ Pending   
 ■ Still in discussion

Figure 1: Sydney Zoo engagement with other visitor based facilities in Western Sydney

***What has been the success or otherwise of these initiatives having regard to recognised social indicators? (Section 7)***

The Applicant has developed a number of tangible collaborative initiatives with the objective of growing the Western Sydney Visitor Economy. These initiatives are supported by academic research that demonstrates that cooperation through joint marketing initiatives, joint ticketing, information sharing and cross promotion serve to create “critical mass” and generate additional demand in a tourism area.



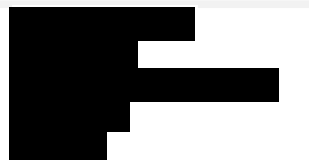
The Applicant has proposed a number of initiatives to other facilities in Western Sydney that align with this academic research. The initiatives also align with recognised social indicators in the form of the Destination NSW strategic directions for growing the Western Sydney Visitor Economy.

DNSW has developed the *Western Sydney Visitor Economy Strategy 2017/18 – 2020/21 (DNSW Strategy)* which identifies 9 Strategic Directions to drive growth in the Western Sydney Visitor Economy. The Applicant has used the nine Strategic Directions as a guide to identify how each initiative is likely to contribute to the growth of the Visitor Economy in Western Sydney, and then attributed a benchmark measure of success to each initiative – refer section 7.

A number of these initiatives (e.g. joint ticketing) cannot commence until the development is operational, while some are already underway (e.g. Run West). At a general level the measurement of the success of these initiatives can be estimated by:


1. The number of parties that agree to sign up – Sydney Zoo is not aware of a market participant in the Western Sydney area that has successfully engaged with complementary attractions to the same extent (as measured by cooperative MOUs signed).
2. The long-term viability of the initiatives.
3. The way that over time, cooperation builds a narrative or precinct identity for Western Sydney that will lead visitors to thematically interrelated attractions in the area, thereby creating business opportunities for the participants and both increasing visitor numbers and extending length of stay in the area.

These initiatives are summarised in the table below:

INITIATIVE	OBJECTIVE	OUTCOMES TO DATE	DNSW STRATEGIC DIRECTIONS	MEASUREMENT OF SUCCESS	TIMING	Initiative Proposed
<b>JOINT TICKETING</b>	Partner with other facilities to offer multi-venue tickets at discounted price in wholesale and retail markets to enhance appeal and increase visitation.	<ul style="list-style-type: none"> <li>8 of 9 parties have agreed to issue joint tickets with the Applicant and have signed MOUs giving effect to this agreement.</li> </ul>	Direct alignment with: <ul style="list-style-type: none"> <li>Strategic Direction 1 – cohesive approach to destination marketing</li> <li>Strategic Direction 3 – product and experience development</li> <li>Strategic Direction 4 – develop destination awareness</li> </ul>	<ul style="list-style-type: none"> <li>Number of joint ticketing arrangement agreed</li> <li>Once the Development is operating, the number of joint tickets sold</li> </ul>	<ul style="list-style-type: none"> <li>Will commence upon opening of the Development.</li> </ul>	
<b>TRANSPORT</b>	Expand public transport options and/or supplement with privately funded options.	<ul style="list-style-type: none"> <li>Initiated discussions with NSW Department of Transport to expand Route 729 service</li> <li>Engaged with Parramatta Light Rail Team to extend service further West to include locality of the Development</li> <li>Engaged with [redacted] to establish a private shuttle service</li> <li>Agreement with [redacted] to provide overflow carparking facility</li> </ul>	Aligns to Strategic Direction 2 – Destination Infrastructure Development by promoting investment in transport and associated infrastructure to support visitor growth	<ul style="list-style-type: none"> <li>Establishment of expanded services to address demand driven by tourism businesses</li> </ul>	<ul style="list-style-type: none"> <li>Public Transport commencement is up to Transport for NSW</li> <li>[redacted] access is intended to commence once [redacted]</li> <li>[redacted] over flow parking will commence immediately upon opening of the Development.</li> </ul>	
<b>LOCAL EVENTS AND FESTIVALS</b>	Create/support new events and festivals in Western Sydney to develop awareness and increase visitation	<ul style="list-style-type: none"> <li>Participated in Western Sydney Parklands 50 Year Celebration in July 2018</li> </ul>	Aligns to: <ul style="list-style-type: none"> <li>Strategic Direction 1 – cohesive approach to destination marketing</li> </ul>	<ul style="list-style-type: none"> <li>Number of events created or supported</li> <li>Participant numbers</li> </ul>	<ul style="list-style-type: none"> <li>Run West – held on March 31<sup>st</sup> 2019 - is the first major example of this. The development of events will on-going</li> </ul>	

	<ul style="list-style-type: none"> <li>• Co-hosting RunWest in March 2019 and next 4 years</li> </ul>	<ul style="list-style-type: none"> <li>• Strategic Direction 3 – product and experience development</li> <li>• Strategic Direction 4 – develop destination awareness</li> <li>• Strategic Direction 5 – Secure and Grow Major Events</li> </ul>	
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<p><b>COOPERATIVE MARKETING AND CONTENT CREATION</b></p>	<p>Work with other facilities to develop marketing material to raise awareness and increase visitation</p>	<ul style="list-style-type: none"> <li>• Partnering with [redacted] to develop Aboriginal Cultural Experience</li> <li>• Working with [redacted] to jointly market the Development and their attractions internationally as the <i>Sydney Iconic Experience</i></li> </ul>	<ul style="list-style-type: none"> <li>• The Development and, in particular, its Aboriginal Cultural Experience will deliver a new product and visitor experience to the Western Sydney tourism market, thereby contributing to Strategic Direction 3 – Product and Experience Development</li> <li>• Joint international marketing aligns to Strategic Direction 4 – Develop Destination Awareness and Improve Perception</li> </ul>	<ul style="list-style-type: none"> <li>• Increased demand from interstate and international tourists</li> </ul>	<ul style="list-style-type: none"> <li>• [redacted] initiative will commence on opening</li> <li>• Joint marketing with [redacted] and [redacted] is already occurring in offshore markets.</li> </ul>	
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<p><b>THINK TANK</b></p>	<p>Engender collaboration amongst local recreational facilities and develop</p>	<ul style="list-style-type: none"> <li>• Established Western Sydney Tourism Business Leaders Think Tank held in December 2018</li> </ul>	<p>Aligns to:</p> <ul style="list-style-type: none"> <li>• Strategic Direction 1 – cohesive approach to destination management</li> </ul>	<ul style="list-style-type: none"> <li>• Level of participation in Think Tank by local businesses</li> </ul>	<ul style="list-style-type: none"> <li>• The initiative has commenced and is ongoing</li> </ul>	
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	<p>initiatives to grow Western Sydney Visitor Economy</p>	<ul style="list-style-type: none"> <li>• Attended by 10 participants, including Featherdale</li> <li>• Semi- annual event</li> <li>• Has ignited discussions/collaboration amongst other participants</li> </ul>	<p>through Government, industry and commercial partnerships</p>	<ul style="list-style-type: none"> <li>• Establishment of strategic partnerships with the Applicant</li> <li>• Establishment of strategic partnerships between other parties</li> </ul>	<p>█ [REDACTED]</p>
<p><b>JOINT ANIMAL WELFARE PROGRAMS</b></p>	<p>Achieve higher goals through collaboration and provide mutual support</p>	<ul style="list-style-type: none"> <li>• Proposed to █ the establishment of a collaborative effort on conservation and animal welfare to strengthen capabilities and develop collaborative relationship</li> </ul>	<p>Aligns to:</p> <ul style="list-style-type: none"> <li>• Strategic Direction 3 – Product and Experience Development by advancing conservation aspects of animal display</li> <li>• Strategic Direction 4 – Develop Destination Awareness and Improve Perception by promoting conservation objectives</li> </ul>	<ul style="list-style-type: none"> <li>• Establishment of joint initiatives</li> </ul>	<ul style="list-style-type: none"> <li>• Waiting for feedback from █</li> </ul> <p>█ [REDACTED]</p>
<p><b>BUSINESS/INDUSTRY ORGANISATIONS</b></p>	<p>Support business associations and other advocates to develop initiatives to grow Western Sydney Visitor Economy</p>	<ul style="list-style-type: none"> <li>• Financial member of Western Sydney Business Connection</li> <li>• Co-funded development of Sydney's West app with Western Sydney Business Connection</li> <li>█ [REDACTED]</li> <li>• Consulted Destination NSW on initiatives to grow Western Sydney Visitor Economy</li> </ul>	<p>Aligns to:</p> <ul style="list-style-type: none"> <li>• Strategic Direction 1 – cohesive approach to destination management through Government, industry and commercial partnerships</li> <li>• Strategic Direction 4 – develop destination awareness</li> </ul>	<ul style="list-style-type: none"> <li>• Participation in initiatives lead by business associations and government bodies</li> </ul>	<ul style="list-style-type: none"> <li>• Initiatives have commenced and are ongoing</li> </ul> <p>█ [REDACTED]</p>

		<ul style="list-style-type: none"> <li>Supported call by Western Sydney Business Chamber for the creation of Destination Network Western Sydney (as proposed by DNSW Strategy)</li> </ul>			
<b>SKILLS</b>	Develop skills and training to support growth of the Western Sydney Visitor Economy	<ul style="list-style-type: none"> <li>Established [redacted] scholarships and [redacted] internships in tourism and zoology in partnership with Western Sydney University</li> <li>Partnering with [redacted] to allow trainee Aboriginal guides to undertake a Cert III qualification in Guiding</li> </ul>	<ul style="list-style-type: none"> <li>Aligns to Strategic Direction 9 – Industry Skills Development</li> </ul>	<ul style="list-style-type: none"> <li>Establishment of scholarships and internships</li> <li>Number of employees and partners of the Applicant achieving recognised qualifications</li> </ul>	<ul style="list-style-type: none"> <li>Applicant is interviewing [redacted] scholarships candidates presently</li> </ul>
<b>EDUCATION</b>	Develop education product for Western Sydney, particularly for schools	<ul style="list-style-type: none"> <li>Developing Sydney’s only integrated Aboriginal education program for primary and secondary schools in partnership with [redacted]</li> <li>Partnering with Western Sydney University to develop educational material</li> </ul>	<ul style="list-style-type: none"> <li>Aligns to Strategic Direction 7 – Develop the Educational Tour Sector</li> </ul>	<ul style="list-style-type: none"> <li>Establishment of educational opportunities for primary and tertiary school students</li> <li>Number of school students attending the Development for education purposes</li> </ul>	<ul style="list-style-type: none"> <li>Development of materials is currently underway for implementation upon opening</li> </ul>

Table 3: List of Sydney Zoo strategic initiatives, benefits, measures of success and partner organisations

### ***What additional activities will be undertaken for the duration of the Development? (Section 8)***

Whilst this Report details initiatives undertaken by the Applicant in the period since the Development Consent was granted, it should be noted that many of these initiatives are ongoing and will increase in scope and intensity once the Development is built and operating.

The table below summarises the duration of each initiative and the further actions that the Applicant expects to take once the Development is operational.

INITIATIVE	DURATION	FURTHER ACTIONS
JOINT TICKETING	Ongoing	<ul style="list-style-type: none"> <li>Expand participants</li> <li>Finalise ticket offerings once Development is open and experience is understood by market</li> </ul>
TRANSPORT	Ongoing	<ul style="list-style-type: none"> <li>Demonstrate demand for new/expanded services once Development is open</li> <li>Implement trial for private shuttle options with a view to moving to permanent arrangement</li> </ul>
LOCAL EVENTS AND FESTIVALS	Commenced and ongoing	<ul style="list-style-type: none"> <li>Implement agreed arrangements – eg RunWest 5 year term</li> <li>Identify new opportunities that align to Development's offerings once Development is open and experience is understood by market</li> </ul>
COOPERATIVE MARKETING AND CONTENT CREATION	Ongoing	<ul style="list-style-type: none"> <li>Expand participants</li> <li>Develop new opportunities once Development is open and experience is understood by market</li> </ul>
THINK TANK	Inaugural event in Dec 2018. A semi annual event going forwards	<ul style="list-style-type: none"> <li>Expand participants</li> <li>Develop and implement new collaborative initiatives to drive growth of the Western Sydney Visitor Economy</li> <li>Next event is scheduled for May 2019</li> </ul>
JOINT ANIMAL WELFARE PROGRAMS	Ongoing	<ul style="list-style-type: none"> <li>Expand participants</li> <li>Develop new initiatives once animals located at Development and curatorial staff in place</li> </ul>
BUSINESS/INDUSTRY ORGANISATIONS	Ongoing	<ul style="list-style-type: none"> <li>Continue to support existing organisations</li> </ul>
SKILLS	Ongoing	<ul style="list-style-type: none"> <li>Continue support for WSU and vocational skills development</li> </ul>
EDUCATION	Ongoing	<ul style="list-style-type: none"> <li>Maintain currency of educational program at the Development</li> <li>Identify underserviced schools in the locality</li> </ul>

*Table 4: Outline of future initiatives and continued actions to promote tourism growth in Western Sydney*

Sydney Zoo is continuing to develop and pursue new and ongoing initiatives with community organisations and tourism destinations.

## **Conclusion**

This Report details a series of initiatives that the Applicant is taking to promote and enhance the Western Sydney Visitor Economy thereby contributing to the NSW Government's objective of doubling overnight visitor expenditure by 2020, including:

- Differentiation of the Development through its unique offering in Western Sydney; and
- Consulting and collaborating with local recreational facilities and businesses as well as private and government organisations with a focus on promoting the Western Sydney Visitor Economy.

The Applicant's initiatives align strongly to the DNSW Strategy and have been highly successful to date with 9 MOUs signed with local tourism businesses. As the Development commences operation, the Applicant will have further opportunities to expand the initiatives and the range of counterparties with which it can collaborate.

At all times the Applicant has taken an open and collaborative approach in its engagement with local recreational facilities and businesses.

This approach has been endorsed by the General Manager of the Western Sydney Business Connection who noted:

*"The team at Sydney Zoo make consistent efforts to engage with key stakeholders in the region and clearly see industry collaboration as key to their success and the success of the sector in Western Sydney."*<sup>3</sup>

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<sup>3</sup> A copy of the letter is attached as Appendix E.



## 2. Background of the Report

This Report details the initiatives undertaken by the Applicant to enhance regional tourism in conjunction with the construction and operation of the Development.

The Applicant has used the Strategic Directions identified by Destination NSW in developing its initiatives and to assess the likely impact of the initiatives on the Western Sydney Visitor Economy.

Both Destination NSW and the Western Sydney Business Connection have endorsed the positive contribution of the Development to the Western Sydney Visitor Economy<sup>4</sup>.

This Report details the initiatives undertaken by the Applicant to enhance regional tourism in conjunction with the construction and operation of the Development. The ultimate aim of these initiatives is to make a material contribution to **growing the Western Sydney Visitor Economy** which is key in meeting the NSW Government's goal of **doubling overnight visitor expenditure by 2020**.

The Report is submitted to the Secretary pursuant to Condition C9 of SSD 7228.

Condition C9 states that:

*Prior to the commencement of operations, the Applicant shall submit a report to the satisfaction of the Secretary demonstrating it has made genuine and reasonable attempts to consult with local recreational facilities and businesses (including Featherdale Wildlife Park) to enhance regional tourism in conjunction with the Development. The report shall include:*

- (a) *details of how the operation of the Development will differ from the existing recreational facilities and businesses; [Section 4],*
- (b) *detail consultation undertaken with local recreational facilities and businesses; [Section 5],*
- (c) *outline initiatives implemented to encourage and enhance continued operation in conjunction with local recreational facilities and businesses; [Section 6],*
- (d) *detail the success or otherwise of these initiatives using recognised social indicators; [Section 7], and*
- (e) *include detail of the additional activities that will be undertaken for the duration of the Development. [Section 8].*

*The Secretary may request updates on these initiatives at any time.*

In undertaking the initiatives detailed in this Report, Sydney Zoo has had regard to the DNSW Strategy which outlines the NSW Government's strategy to drive growth in the Western Sydney Visitor Economy<sup>5</sup>. The Development is located centrally in Western Sydney and was recognised in the DNSW Strategy as one of a "number of game changing opportunities in the pipeline for Western Sydney"<sup>6</sup>. The DNSW Strategy was developed following extensive public

<sup>4</sup> See letters of support attached as Appendix D and Appendix E.

<sup>5</sup> A copy of the Western Sydney Visitor Economy Strategy 2017/18 – 2020/21 is attached as Appendix C.

<sup>6</sup> DNSW Strategy at page 11.

consultation and policy assessment. Accordingly, it represents the most suitable guidance for the Applicant in developing and implementing initiatives to drive growth in the Western Sydney Visitor Economy.

The DNSW Strategy identifies “*specific supply side issues, including infrastructure and skills, and ways to stimulate demand, in order to grow the visitor economy*”<sup>7</sup> [in Western Sydney]. In formulating a strategy to achieve this central objective, it articulates nine broad strategic directions<sup>8</sup> that should be pursued. The Applicant has used these strategic directions in developing its initiatives and to assess the likely impact of the initiatives on the Western Sydney Visitor Economy..

The DNSW Strategy states that “*for the Strategy to be successful, a collaborative effort is required between industry, commercial partners and all levels of Government*”<sup>9</sup>. Accordingly, the Applicant has consulted with both Destination NSW and the Western Sydney Business Connection in relation to its initiatives, as well as other government authorities and a significant number of relevant businesses located in Western Sydney.

Significantly, both Destination NSW and the Western Sydney Business Connection have endorsed the approach of the Applicant and the positive contribution of the Development to the Western Sydney Visitor Economy.

Whilst this report details initiatives undertaken by the Applicant in the period since the Development Consent was granted, it should be noted that many of these initiatives are ongoing and will increase in scope and intensity once the Development is built and operating.

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<sup>7</sup> DNSW Strategy at page 3.

<sup>8</sup> See page 4 of the DNSW Strategy for a summary of the strategic directions.

<sup>9</sup> DNSW Strategy at page 3.

### 3. Western Sydney Tourism

The Western Sydney region, as identified by the DNSW Strategy, comprises the South West, West and West Central districts defined by the Greater Sydney Commission<sup>10</sup>.

Through its membership of the Western Sydney Business Connection and other industry contacts, the Applicant identified a number of recreational facilities and businesses in Western Sydney with which it has undertaken discussions with a view to enhancing regional tourism. Given the large area comprising Western Sydney, the Applicant in the first instance has sought to engage with businesses that are geographically closer to the Development or that have strategic importance.

The Development is centrally located within the Western Sydney region in the Western Sydney Parklands at Bungarrabee and is approximately 5 minutes drive from the intersection of the F4 and M7. The geographic area of Western Sydney is comprised of Local Government Areas (LGAs) in the South West, West and West Central districts defined by both Destination NSW and the Greater Sydney Commission. It includes the Blue Mountains, Hawkesbury and Penrith in the West, Blacktown, the Hills, Parramatta and Cumberland in West Central, and Fairfield, Liverpool, Camden, Campbelltown and Wollondilly in the South West.

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<sup>10</sup> DNSW Strategy at page 6.

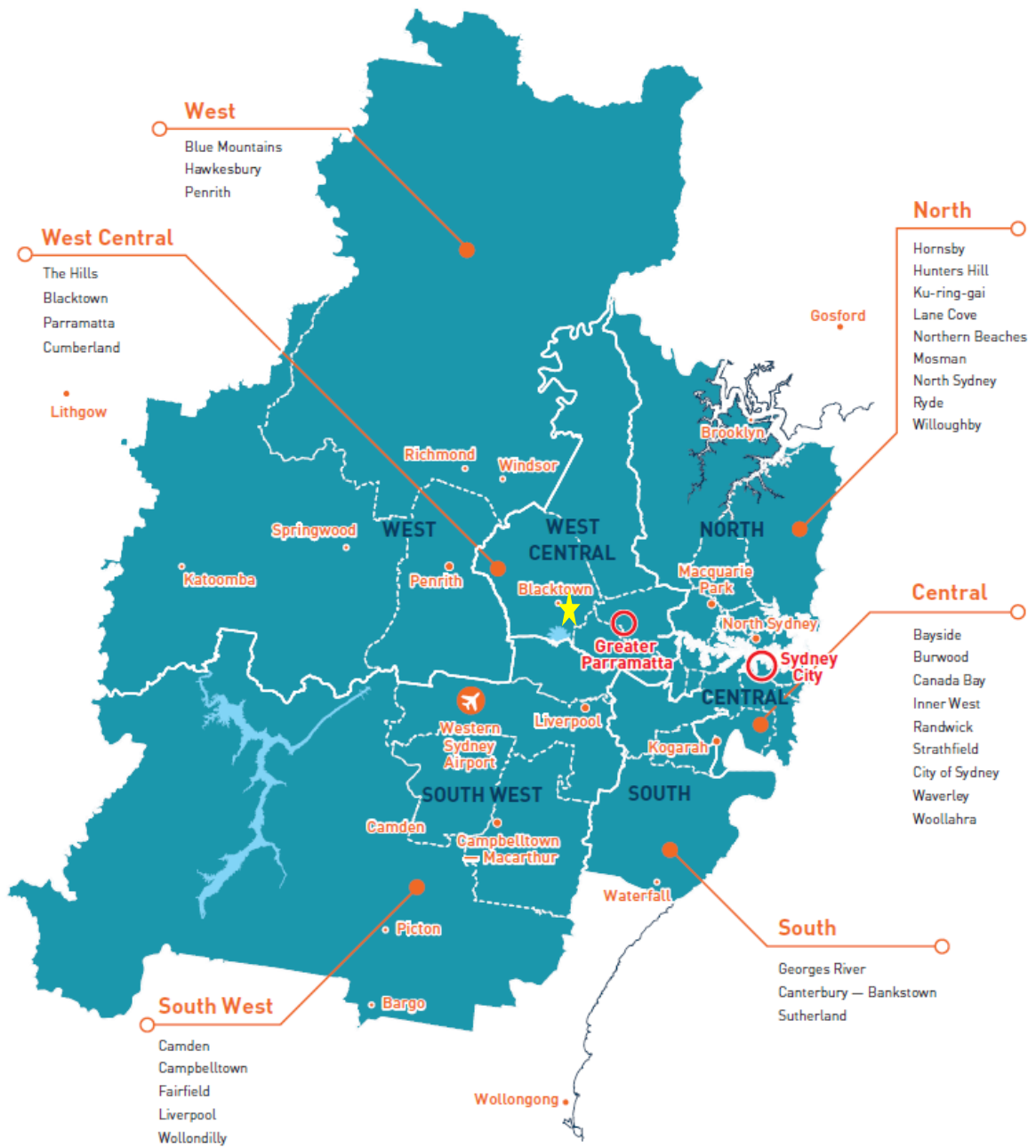


Figure 2: Map showing location of the Development in relation to Western Sydney as defined by the Greater Sydney Commission and DNSW.

Recreational facilities and businesses in Western Sydney with which the Applicant has undertaken discussions with a view to enhancing regional tourism include:

Table 5: Tourism organisation Sydney Zoo has approached regarding tourism promotion

FACILITY/BUSINESS	DESCRIPTION	LOCATION
[REDACTED]	[REDACTED]	Eastern Creek
[REDACTED]	[REDACTED]	Western Sydney
[REDACTED]	[REDACTED]	Prospect
[REDACTED]	[REDACTED]	Doonside
[REDACTED]	[REDACTED]	Penrith
[REDACTED]	[REDACTED]	Western Sydney
[REDACTED]	[REDACTED]	Eastern Creek
[REDACTED]	[REDACTED]	Rooty Hill
[REDACTED]	[REDACTED]	Western Sydney
[REDACTED]	[REDACTED]	Prospect
[REDACTED]	[REDACTED]	Eastern Creek

Table 6: Western Sydney based tourism organisations the Applicant has approached regarding tourism promotion

The Applicant has also identified recreational facilities and businesses not located in Western Sydney but which offer opportunities for the Western Sydney Visitor Economy through strategic initiatives such as joint ticketing and marketing:

FACILITY/BUSINESS	DESCRIPTION	LOCATION
[REDACTED]	[REDACTED]	Global
[REDACTED]	[REDACTED]	Sydney
[REDACTED]	[REDACTED]	[REDACTED]
[REDACTED]	[REDACTED]	Katoomba

Table 7: Greater Sydney based tourism organisations the Applicant has approached regarding tourism promotion

In addition, the Applicant has identified a number of organisations and authorities that represent or contribute to the Western Sydney Visitor Economy. These include:

ORGANISATION/AUTHORITY	DESCRIPTION	AREA OF FOCUS
Blacktown Council	Local Council	Blacktown
Destination NSW	NSW Government Agency	NSW
Muru Mittigar	Indigenous Social Enterprise	Traditional lands of the Darug Aboriginal people
NSW Department of Transport	NSW Government Agency	Public Transport
Parramatta Light Rail Team	NSW Government Agency	Public Transport
Western Sydney Business Connection	Business Association	Western Sydney
Western Sydney University	University	Western Sydney

Table 8: Organisation and authorities the Applicant is working with to promote Western Sydney tourism

The map below shows the location of each of the local recreational facilities relative to the Development:



## 4. Differentiation

***“Details of how the operation of the Development will differ from the existing recreational facilities and businesses”***

Once completed, the Development will be the only place in Australia where visitors can experience a wide range of exotic animals, native animals exhibited in an integrated Aboriginal cultural experience as well as a large-scale aquarium replicating the Parramatta River ecosystem. Sydney Zoo will also display a number of species that cannot be seen by the general public anywhere else in Sydney.

No other zoological facility with both an exotic and Australian animal offering is located in Western Sydney. The only other large-scale zoological facility in the Greater Sydney Region is Taronga Zoo which is located in Mosman, approximately 50km to the East of the Development.

The Development is highly complementary to the major recreational facilities located nearby in terms of its highly differentiated product offering, appeal to families and proximate location.

The Development is significantly differentiated from Featherdale in scope and scale, ensuring the 2 facilities will offer different visitor experiences. This differentiation is further entrenched by Conditions of Consent B6, B7, B8 and B9, which apply conditions specific to the operation of the Australiana section of Sydney Zoo.

The Development has been constructed with 5 major display areas – African Grasslands, Americas, South East Asia, Primates Boulevard and Australian. Reflecting this display strategy, the Development will have a wide range of exotic animals from around the world including species from Africa, Asia and America. As such, the Development will offer the Western Sydney community, local schools and education facilities, and tourists, a new opportunity to experience and learn about animals of this kind.

As part of the African Grasslands region, the Development will exhibit key species currently not on display at any other facility in the Greater Sydney Region. Species exclusive to the Development in the Greater Sydney Region are expected to include the White Rhino, Cheetah, Spotted Hyena and African Lion.



**African Savanna – Elevated Boardwalk**

An artist impression of the elevated boardwalk. Visitors will be eye-to-eye with lions as they walk through this exhibit. This walk-through experience is one of a kind in Sydney.



**Sydney Exclusive – these animals cannot be seen by the public anywhere else in Sydney.**

Figure 4: Unique animals on display at Sydney Zoo – Cheetah, White Rhino, African Lion, Spotted Hyena.

Design is part of what makes the Development unique and different to existing local facilities. The Development will bring visitors closer to animals than ever before. Cleverly designed exhibit boundaries will disappear from view as visitors walk through a series of landscapes naturally designed for visitors and animals alike. A safe but exciting environment will promote high levels of visitor engagement and foster a positive learning environment.

The Development’s regional display strategy will allow the Applicant to demonstrate context and create a narrative around its conservation messaging. Academic studies have shown that a key to achieving positive engagement with zoo audiences and improving learning outcomes is presenting animals in natural habitats. A significant part of this is presenting animals in the context of their biome with other species, rather than as an individual species.





**Sydney Zoo Precincts**

Figure 5: Map of regional display locations at Sydney Zoo. <sup>11</sup>

Elevated boardwalks will allow a ‘giraffe’s eye’ view of aspects of the landscape and animals, while cleverly designed water features and terrain ensure an immersive experience.

By using modern exhibit design which is focused on advanced animal behavioural enrichment methods, utilisation of technology and incorporation of water features and elevated boardwalks, the Development will offer the highest standards of animal welfare, while offering an immersive, ‘safari-like’ experience for visitors.



Figure 6: Example of open range exhibit design

*Artist impression of tiger enclosure utilising moating to promote immersive visitor experiences.*



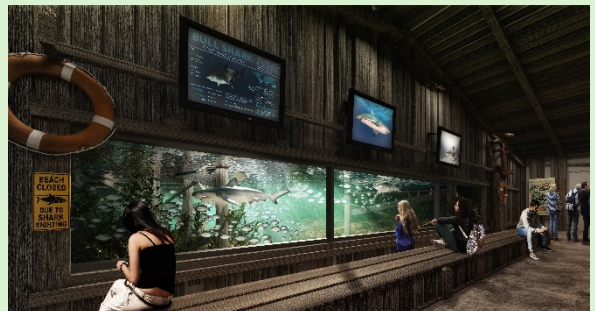
*Range of species includes exotic animals*



*Design Includes water features, boardwalks and buried buildings to enhance the visitor experience*



*Australiana offering including Integrated Aboriginal experience is unique in Sydney*



*Sydney Zoo will offer a large scale Aquarium*

**Visitor amenities**



*Licensed restaurant with 500 capacity*



*Wide open green space with capacity for hundreds of guests*



*Large scale entry building including 22 ticket terminals. Dedicated entry for organised group tours and education*



*Large habitat for reptiles, insects and nocturnal animals with buried building format*

*Figure 7: Image montage illustrating unique differentiating features of Sydney Zoo*

## 4.1. Existing Facilities and Businesses

There is no other zoological facility offering access to a wide range of both exotic and Australian animals located in Western Sydney. Beyond the locality of the Development, the only other large-scale zoological facility in the Greater Sydney Region is Taronga Zoo which is located in Mosman, approximately 50km drive to the East of the Development.

There are a number of smaller wildlife parks in the Greater Sydney Region, including Featherdale which is located in Western Sydney. Generally, these wildlife parks are significantly differentiated from the Development when taking into account the key features of the Development:

FEATURE	SYDNEY ZOO	WILDLIFE PARKS
Range of species, including exotic animals	Yes	No – primary focus on Australiana
Design principles for animal exhibits including water features, boardwalks and buried buildings	Yes	No – usually simple design
Australiana offering which includes an integrated Aboriginal experience	Yes – unique in Sydney	No
Large-scale Aquarium	Yes	No
Visitor amenities, including licenced restaurant, kiosks, picnic areas	Yes	No – usually insufficient area to provide these
Flighted birds	No	Yes

Table 9: Differentiating features between Sydney Zoo and other Wildlife Parks in Western Sydney

The degree of differentiation of the Development is demonstrated further by reference to the major recreational facilities and businesses currently in the locality of the Development.

These include:

- **Wet ‘n’ Wild** – water park
- **Sydney Motorsport Park** – motorsport facility
- **Western Sydney Parklands** – parkland
- **Blacktown International Sportspark** – sporting facility
- **West HQ** – entertainment facility, restaurants, conference centre, accommodation

The Development is highly complementary to these facilities in terms of its significantly differentiated product offering, appeal to families and proximate location. The Development and each of these facilities (with the exception of Wet ‘n’ Wild) were selected to host the inaugural RunWest event that was held in March 2019, demonstrating that the Development

is regarded as providing a positive contribution to this existing set of major recreational facilities.

## 4.2. Featherdale Wildlife Park

Featherdale is a wildlife park situated on 3.1 hectares of land in Doonside, approximately 6km from the Development. Featherdale specialises in the exhibition of Australian native animals with the large majority of exhibited animals being native birds. Animals are presented in enclosures designed to reflect the native Australian habitat.

By comparison, the Development is situated on 16.5 hectares of land and will exhibit both exotic and Australian animals.



■ Featherdale    — Sydney Zoo

Figure : Sydney Zoo scale comparison to Featherdale

At a facility level, the Development is significantly differentiated from Featherdale in scope and scale. This is enshrined by Condition B7 which requires that “for the commencement of opening to the public the Development must have for display to the public at least two-thirds of the exotic species nominated...”, ensuring that there will be significant differentiation between the animal collections of the two facilities from the commencement of operations by the Applicant.

The Development's larger size and infrastructure also enable the Applicant to offer significantly differentiated visitor experiences:

Table 10: Differentiation features offered as a consequence of increased scale

Duration of Visit	The Development is situated on 16.5 hectares and will have 30 major exhibits, including an aquarium and large nocturnal house. It is expected that the visitor experience will take 4+ hours as opposed to 2 hours at Featherdale.
BOMA Restaurant and picnic areas	The BOMA Restaurant will be a full-service offering and has seating capacity for 300 guests. A further 200 guests can be seated at 3 picnic areas located around the Zoo. It is expected that the duration of visits will mean that many visitors spend lunchtime at the Development. Featherdale offers a kiosk only with no indoor seating.
Amphitheatre	The Development has an amphitheatre with seating capacity for 200 guests. This can be used for large-scale educational demonstrations, shows and meetings.
Retail Offering	<p>The Development's retail offering will include a range of proprietary and unique products, including licenced Darug Aboriginal artworks promoting local Aboriginal arts and culture.</p> <p>Sydney Zoo is also working on licencing and developing animal imagery for development of an exclusive range of clothing, bags and other merchandise.</p> <p>Sydney Zoo is supplying the majority of its food from local suppliers. E.g Vittoria coffee (located in Silverwater)</p>
Conferences	The Development can host corporate events in its own right, and is also in the early stages of working with Groups such as [REDACTED] to assist in the development of their own conference facilities business. For example, by offering complementary off-site activities to improve the attractiveness of the conference product offering at [REDACTED]
Incentive Groups	The Development also has significant capacity to host large incentive groups and tours that number up to several thousand delegates.

Considered in isolation, the native animal offering of the Development will be differentiated from that of Featherdale, particularly over the first three years of the Development's operation. In its Determination Report, the Planning Assessment Commission noted that, at the suggestion of Sydney Zoo, it had imposed the following conditions to differentiate the Development's native animal offering from that of Featherdale<sup>12</sup>:

Table 11: Differentiation features enshrined in consent conditions

CONSENT CONDITION	DESCRIPTION	DIFFERENTIATION
B6	<ul style="list-style-type: none"> <li>• Display of Australian native animals to comprise less than 1.6 hectares</li> <li>• Australian native animals to be displayed as part of an Aboriginal Cultural Experience</li> <li>• Australian native animal display to include from the commencement of opening to the public an Aquarium, Reptile House and Insectarium and Nocturnal House</li> </ul>	<ul style="list-style-type: none"> <li>• The Australian native animal display area will be a minor proportion of the Development's total display area ensuring that the Development's overall visitor experience will have an emphasis on exotic animals.</li> <li>• The Australian native animal display area of the Development will be smaller than that of Featherdale.</li> <li>• The display of native Australian animals in the context of an Aboriginal Cultural Experience will be a unique feature of the Development's exhibit ensuring that it offers a different visitor experience to that of Featherdale.</li> <li>• The inclusion of an Aquarium and Insectarium in the Development's Australian native animal display will ensure that the Development exhibits species that are not included at Featherdale (which does not have an aquarium or insectarium).</li> </ul>
B7	For the commencement of opening to the public the Development must have for display to the public at least two-thirds of the exotic species nominated in the Additional Information	This condition will ensure that the Development does not open as an Australian native-only facility like Featherdale.
B8	For the first 3 years after opening to the public, the Applicant is prohibited from having Interactive Programs that involve touching a koala except as part of demonstrations in the educational amphitheatre or provided in the context of education of school groups	A key feature of the Featherdale offering is interactive experiences involving the opportunity to touch koalas. This condition ensures that the Development will not offer this visitor experience in the first 3 years of its operation.
B9	The exhibition of birds at the Development is limited to ratites (flightless birds) and penguins only	Birds comprise a majority of the Featherdale animal collection. This condition ensures that there is further differentiation between the animal collections of the two facilities.

It was acknowledged by the Planning Assessment Commission that the conditions "*would go a long way toward mitigating impacts arising from the establishment of a new zoo*"<sup>13</sup>.

<sup>12</sup> NSW Planning Assessment Commission Determination Report Sydney Zoo (SSD 7228) at page 11

<sup>13</sup> *ibid* at page 11.

Accordingly these conditions of consent will ensure that the Development achieves the differentiation objective of Condition C9(a).

The comparison table below further highlights the key differences between the Development and Featherdale. It also includes references to the specific conditions included in the Development Consent that address each of the differences between the facilities.

	SYDNEY ZOO	FEATHERDALE	CONSENT CONDITIONS
<b>FACILITY</b>	Zoological facility	Wildlife park	
<b>AREA</b>	16.5 hectares	3.1 hectares	
<b>PARKING</b>	1,053 spaces	60 spaces plus small overflow area	
<b>ANIMAL HERITAGE</b>	Exotic and Australian; minimum 2/3 of exotic animals on display on commencement	Australian only	B6, B7
<b>AQUARIUM</b>	Yes	No	B6
<b>REPTILE AND NOCTURNAL HOUSE</b>	Yes	Yes	B6
<b>INSECTARIUM</b>	Yes	No	B6
<b>AVIARIES</b>	No; no birds except raptors (flightless birds) and penguins	Yes – 70% of animal collection; >1,000 birds	B9
<b>AUSTRALIAN ANIMALS (SMALLER MARSUPIALS AND MAMMALS)</b>	Yes – integrated with Aboriginal cultural experience; less than 1.6ha of 16.5 ha; limitation on touching of koalas for 3 years	Yes – no theme; 100% of facility	B6, B8, C21
<b>PRIMATES</b>	Yes	No	B7
<b>BIG CATS</b>	Yes	No	B7
<b>AFRICAN</b>	Yes	No	B7
<b>OTHER LARGE ANIMALS</b>	Yes	No	B7
<b>RESTAURANT</b>	Yes	No	
<b>KIOSKS</b>	2	1	
<b>EDUCATIONAL AMPHITHEATRE</b>	Yes	No	
<b>PICNIC AREAS AND GARDENS</b>	Yes	No	
<b>WETLANDS AND WATERWAYS</b>	Yes	No	
<b>QUARANTINE FACILITY</b>	Yes	No	



Table 12: Specific differentiation between Sydney Zoo and Featherdale



**Condition B6**

The Aquarium (top left) and Reptile and Nocturnal House (bottom).

**Condition B9**

Emu (top right): the exhibition of birds at the Development is limited to ratites (flightless birds) and penguins only.

Figure 8: Montage of images showing how consent conditions are reflected in design

## 5. Local Consultation

### **“Detail consultation undertaken with local recreational facilities and businesses”**

The Applicant has been active in initiating and engaging in regular communications with key local recreational facilities and businesses. The objective of this engagement is to develop joint initiatives that will drive growth in the Western Sydney Visitor Economy.

Engagement with local recreational facilities and businesses has included Bilateral Discussions, signing Memorandums of Understanding and the establishment of the Tourism Business Leaders Think Tank.

Nine of the 13 businesses that the Applicant has approached have agreed joint initiatives and executed a Memorandum of Understanding detailing how the businesses will work together to grow the Western Sydney Visitor Economy.

The Applicant has made particular efforts to engage with Featherdale. To date, these efforts have had limited success with Featherdale offering limited tangible engagement. The Applicant continues to engage with Featherdale and is hopeful of achieving agreement on some joint initiatives.

Key initiatives that have been canvassed with potential partners are described in further detail in Section 6 and include:

- Joint marketing and promotion, including joint ticketing. The objective being to develop destination awareness, improve visitor participation levels and broaden the diversity and accessibility of products offered in the Western Sydney area.
- Transport and infrastructure development. In particular, shared-cost arrangements to improve the accessibility of local facilities for people who don't have cars. This has the potential to grow visitor numbers.
- Creation of local events and festivals. Designed to improve public awareness of local facilities and the range of recreational options that are available to people looking for a day out. Festivals also stimulate demand by providing specific reasons for people to attend.

Engagement with local recreational facilities and businesses by Sydney Zoo has included:

#### *Bilateral Discussions*

Meetings and email communication to develop suitable joint initiatives with other facilities.

#### *Memorandums of Understanding*

Formal document signed by each party summarising agreement reached in Bilateral Discussions. Increases the likelihood that initiatives discussed will be implemented by providing a clear description of the agreed initiatives as well as a tangible demonstration of commitment by each party.

*Tourism Business Leaders Think Tank*

Multi-party conference established by the Applicant to discuss growth of the Western Sydney Visitor Economy. Promotes collaboration between facilities.

In addition to consultation undertaken with local recreational facilities and businesses, the Applicant has met with and consulted both Destination NSW and Western Sydney Business Connection on how it can make a meaningful contribution to the Western Sydney Visitor Economy. As part of this engagement, the Applicant presented its strategy and supporting initiatives and received an endorsement from each organisation. These letters of support are attached as Appendix D and Appendix E. The following excerpts are taken from each letter:

*“Sydney Zoo is seen by the Western Sydney community as an outstanding opportunity for the Western Sydney Visitor Economy. Sydney Zoo will also deliver a number of related economic benefits that will help the region prosper at this important time”*

*“The team at Sydney Zoo make consistent efforts to engage with key stakeholders in the region and clearly see industry collaboration as key to their success and the success of the sector in Western Sydney.”*

The table below summarises the time spent to date by the Applicant consulting with potential MOU partners and developing joint initiatives. This activity is ongoing.

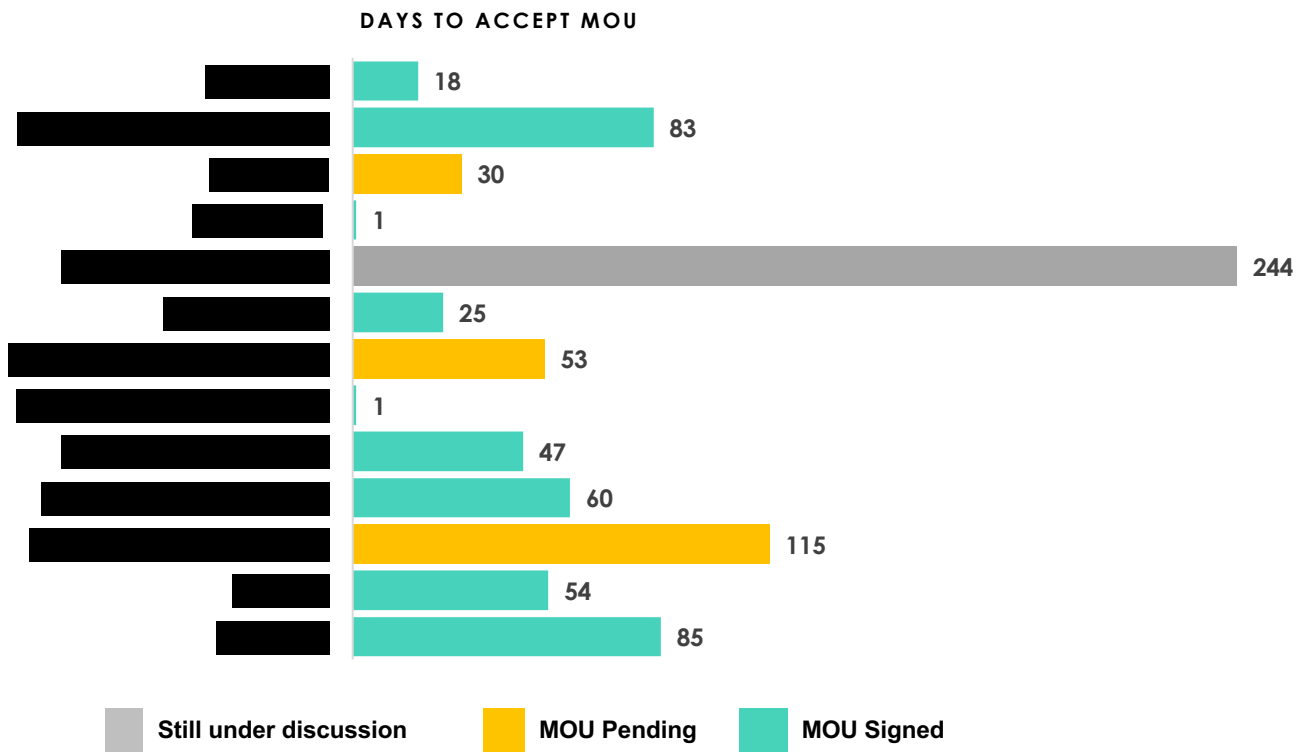


Figure 9: Status of discussions with other tourism organisations in Western Sydney

The table below summarises the engagement undertaken by the Applicant and the status of the Memorandum of Understanding with each potential MOU partner.

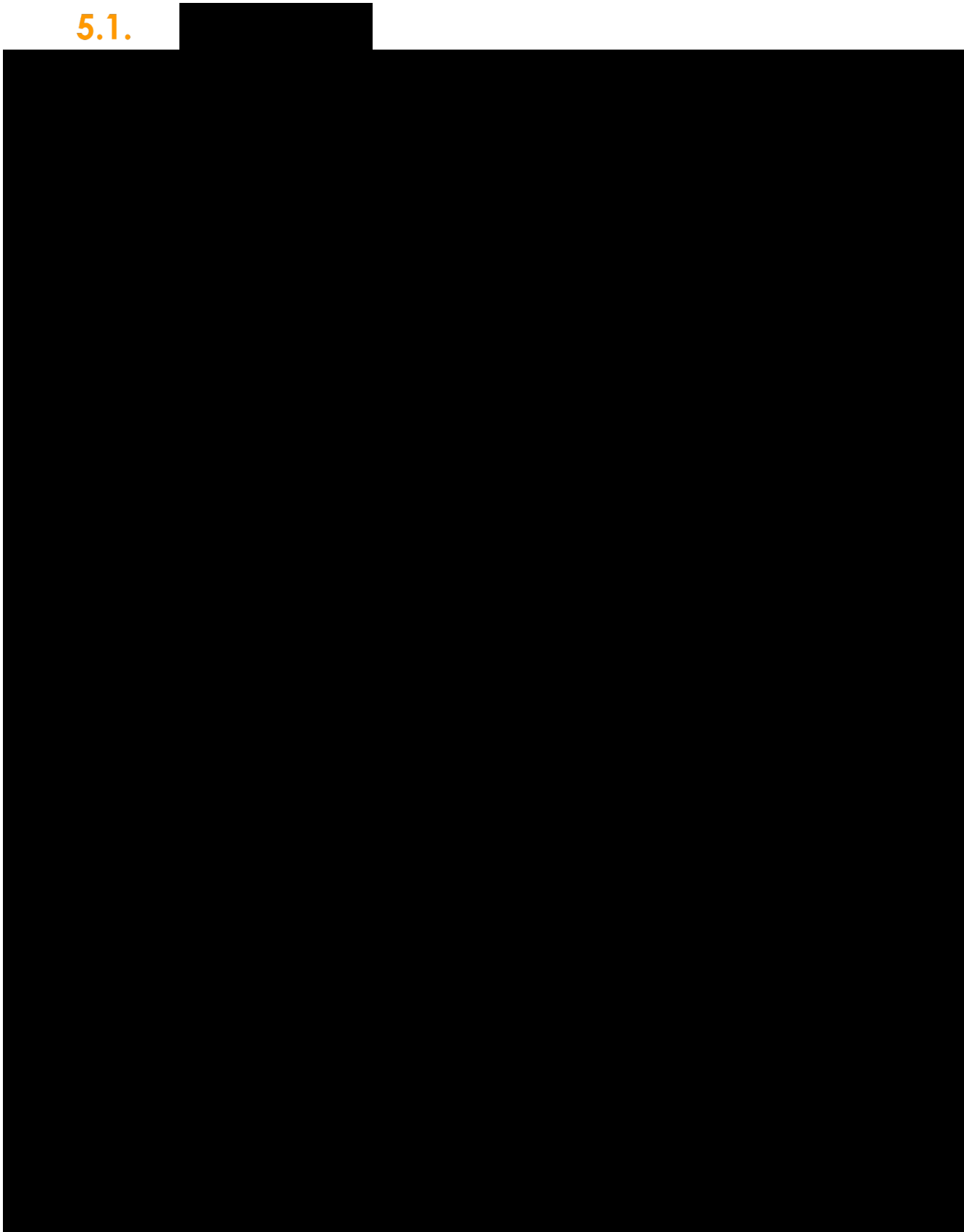
	INITIAL MEETING	EMAILS	MEETINGS	WORKSHOP	MOU STATUS
[REDACTED]	✓	✓	✓	✓	DONE
[REDACTED]	✓	✓	✓	✓	DONE
[REDACTED]	✓	✓			ONGOING
[REDACTED]	✓	✓	✓	✓	DONE
[REDACTED]	✓	✓	✓	✓	ONGOING
[REDACTED]	✓	✓	✓	✓	DONE
[REDACTED]	✓	✓	✓	✓	ONGOING
[REDACTED]	✓	✓	✓	✓	DONE
[REDACTED]	✓	✓	✓	✓	DONE
[REDACTED]	✓	✓	✓	✓	DONE
[REDACTED]	✓	✓	✓	✓	ONGOING
[REDACTED]	✓	✓	✓	✓	DONE
[REDACTED]	✓	✓	✓	✓	DONE

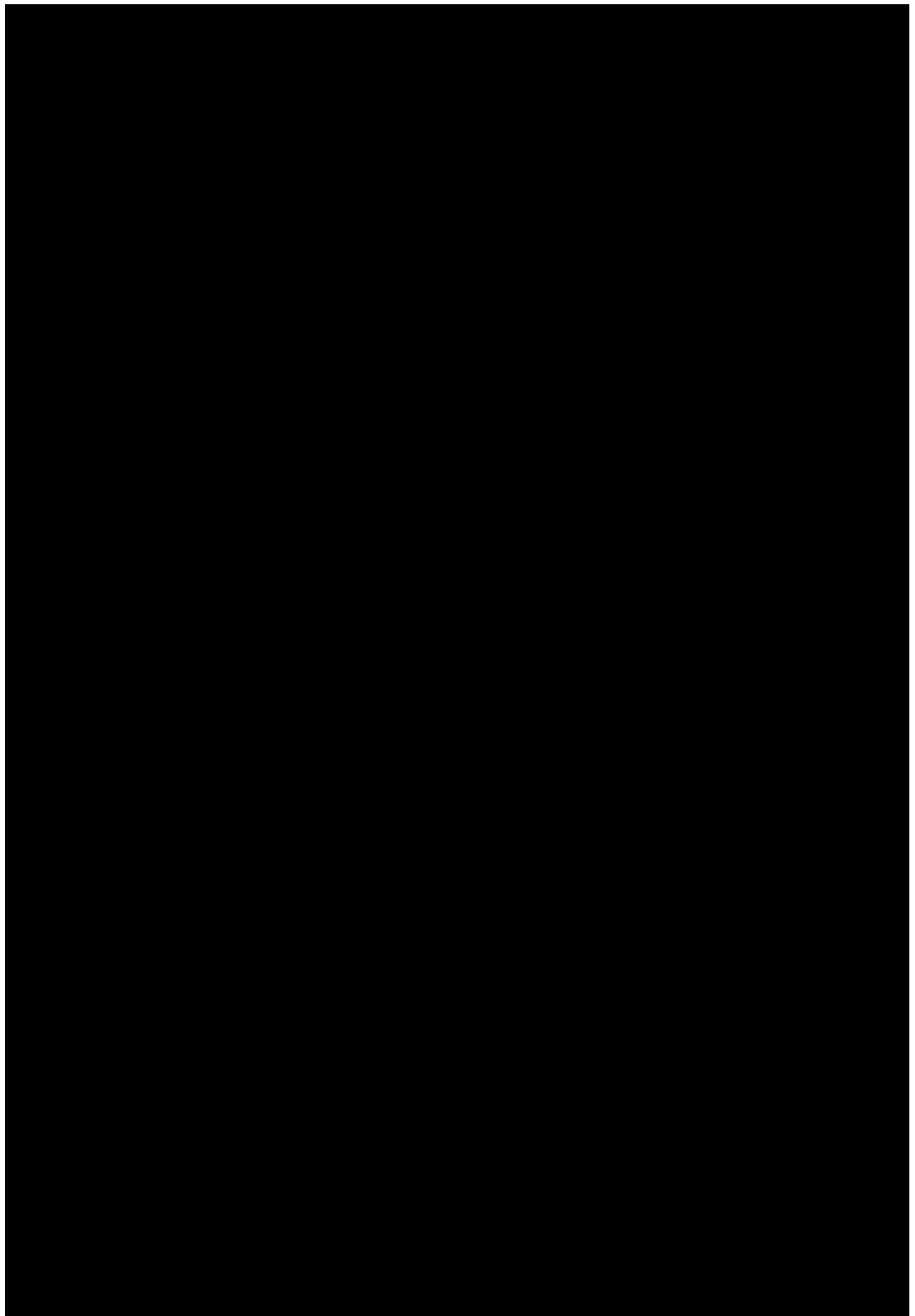
Table 13: Summary of engagement undertaken by the Applicant with other tourism facilities

Nine of the 13 businesses that the Applicant has approached have agreed joint initiatives and executed a Memorandum of Understanding detailing how the businesses will work together to grow the Western Sydney Visitor Economy. Four Memorandums of Understanding are pending, with terms being negotiated between the Applicant and the partner.

The execution of a Memorandum of Understanding forms the basis of an agreed forward path for the implementation of joint initiatives and, as such, underpins the continuation of consultation and collaboration between the parties.

5.1.





## 6. The Applicant's Initiatives

***“Outline initiatives implemented to encourage and enhance continued operation in conjunction with local recreational facilities and businesses”***

The Applicant has developed a number of initiatives to be undertaken collaboratively with local recreational facilities and businesses with the objective of enhancing the Western Sydney Visitor Economy. These initiatives align to the Strategic Directions outlined in the DNSW Strategy.

The initiatives are described in detail below and include:

- Joint Ticketing
- Jointly Funded Transport
- Creation of Local Events and Festivals
- Cooperative Marketing and Content Creation
- Western Sydney Tourism Business Leaders Think Tank
- Jointly Run Animal Welfare Programs
- Business/Industry Organisation Initiatives
- Skills
- Education

### 6.1. Introduction

There is extensive academic research demonstrating the value of cooperation and tourism clusters in promoting a vibrant visitor economy to the benefit of all participants. Spatial clusters of tourism attractions enhance appeal for individual attractions across a broader range of visitor markets.<sup>16</sup>

This generates spin-off benefits for individual attractions **by increasing total visitation across the cluster and provides a critical mass of activities** that encourages visitors to extend their visit by one or more days and make return visits.<sup>17</sup> Co-location of thematically inter-related attractions further extends visitor stay and assists smaller attractions to compete with larger ones through consortia based on a willingness to cooperate (Sternberg 1997 *op cit.* Weidenfeld *et al*, 2011).

Weidenfeld *et al* (2009) note tourism clusters are important in destination development by **generating demand** and that complementary and compatible relationships between

<sup>16</sup> Weidenfeld. A., Butler. R., Williams. A. (2009) Clustering and Compatibility of Tourism Attractions. *International Journal of Tourism Research*. 11: 1-16

<sup>17</sup> Weidenfeld. A., Butler. R., Williams. A. (2011) The role of clustering, cooperation and complementarities in the visitors attraction sector. *Current issues in Tourism Research*. 14(7): 595-629

attractions contribute to a destination’s unique character. They find clusters organise spatially and thematically (i.e. by attraction type), and investigated whether this influences tourist movement between attractions, as well as the impact of spatial proximity, attraction density and similarity.

Weidenfeld *et al* find levels of attraction compatibility range from high to low based on the percentage of shared visitors. A high percentage of shared visitors reflects synergies of appeal and visitors being unlikely to visit one attraction without visiting the other in the same trip. Therefore, **enhancing the critical mass of similar attractions in a destination has a positive impact on visitors and the cumulative impact of two or more similar attractions generates visits to a destination and a preference for one destination over another.**

Indeed, Weidenfeld *et al* find the appeal of a cluster is stronger than individual attractions within it, and a **strong trip generation effect** exists within a short distance from an originating attraction. This means spatial proximity and being located en-route to an attraction or in a logical sequence can draw more visitors to an attraction than would otherwise be the case.

Weidenfeld *et al* concluded that cooperation in tourism clusters was found mainly in marketing, including advertising, signage, distributing vouchers and, in some cases, attractions also had joint suppliers, made joint purchases and negotiated reduced prices.

The factors affecting cooperation between tourist attractions is shown schematically below<sup>18</sup>:

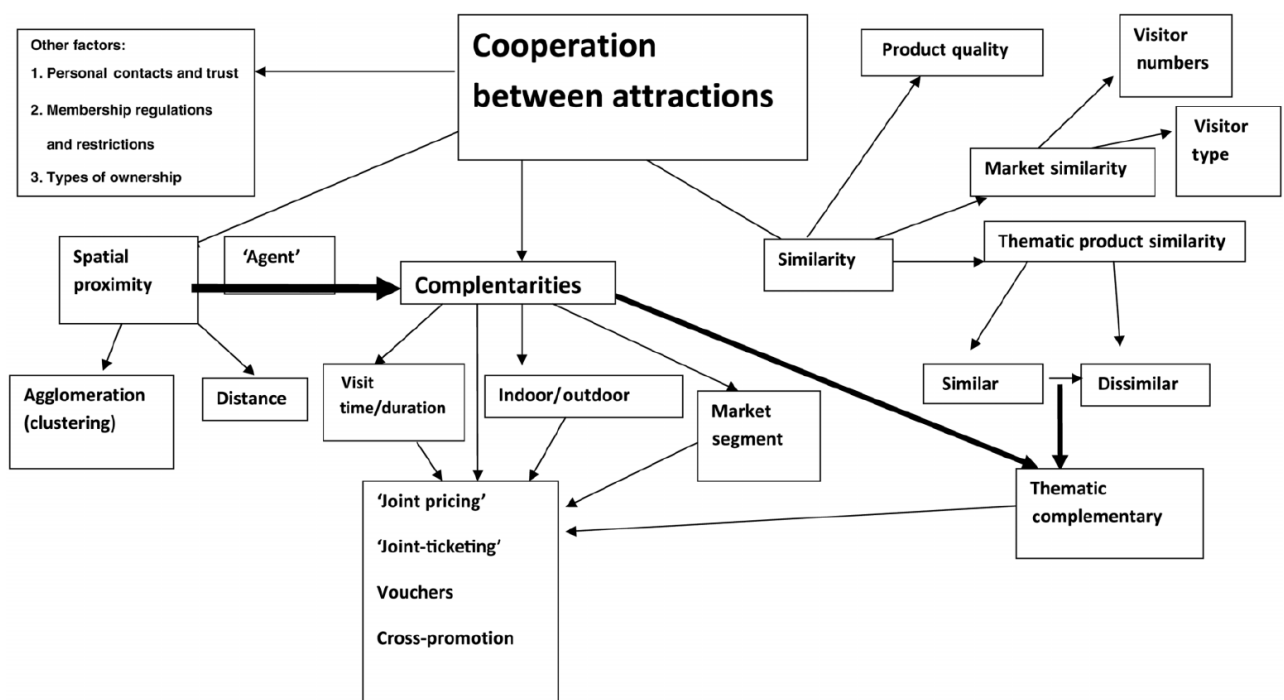


Figure 10: Connectivity of relationships and features that assist tourism cluster development<sup>19</sup>

<sup>18</sup> Adi Weidenfeld , Richard Butler & Allan W. Williams (2011) The role of clustering, cooperation and complementarities in the visitor attraction sector, *Current Issues in Tourism*, 14:7, 595-629,

<sup>19</sup> Ibid



Additionally, where spatial proximity is high, that is, where two attractions are located close to each other, Weidenfeld et al (2011) find collaborative marketing is less likely, and **knowledge transfer and joint problem solving** more likely, particularly for similar attraction types.

The Applicant has proposed initiatives to other tourism operators that seek to maximise the potential benefits from cooperation in the Western Sydney Area. These initiatives are practical and correspond with the key benefits cited as a result of cluster behaviour and co-operation, namely:

1. Joint Ticketing to generate consumer demand, broaden the appeal of the Western Sydney tourism offering, and potentially improve critical mass;
2. Creation of local events events and festivals to generate demand and contribute to Western Sydney's unique character;
3. Joint Marketing initiatives to enhance the critical mass of local attractions in the Western Sydney Area;
4. Creation of the Tourism Business Leaders Think Tank to improve the personal contacts and trust throughout the Western Sydney network, which as shown in the flow chart is essential for cooperation;
5. Joint problem solving by proposing jointly funded transport to improve accessibility while lowering the costs of delivery for a single institution; and
6. Offering specific knowledge transfer between the Applicant and Featherdale through jointly run animal welfare programs.

These initiatives are detailed more fully below.

## 6.2. Joint Ticketing

The Applicant is seeking to collaborate with a range of local facilities in Western Sydney to develop a joint ticket offer for consumers. This initiative has a direct alignment to Strategic Directions 1 (Destination Marketing), 3 (Product Development) and 4 (Destination Awareness) of the DNSW Strategy.

Spatial clusters of tourism attractions enhance appeal for individual attractions across a broader range of visitor markets. This generates direct benefits for individual attractions by increasing total visitation across the cluster and provides a critical mass of activities that encourages visitors to extend their visit by one or more days and make return visits. Co-location of thematically inter-related attractions assists smaller attractions to compete with larger ones through consortia based on a willingness to co-operate.

Community consultation undertaken by the Applicant identified a strong desire for discount ticket options for local residents. This is further supported by a 2018 survey by Ellaslist (attached as Appendix F) which found that "a good deal" is the number one driver for families to visit an attraction. Based on this evidence, the Applicant believes there is a strong opportunity to develop joint ticketing offers with Western Sydney tourism businesses.

The Applicant has reached agreement with or is seeking an agreement with a number of parties to offer a joint ticket which provides access to the Development and the relevant partner's facility. This will stimulate demand for both facilities and offer diversity of choice for

the consumer. Under this arrangement both parties will agree to offer the ticket at a discount off retail price.

Joint ticketing will be a year-round activity and the Applicant will seek to deliver this initiative from the commencement of operation of the Development. It is intended that bundled ticketing will be offered to both tour operators and to individuals at retail rates. To date the Applicant has executed MOUs including joint ticketing initiatives with 8 of 9 parties in the Western Sydney region:



### 6.3. Creation/Support of Local Events and Festivals

The Applicant is seeking to work with other local facilities to create new events and festivals in Western Sydney. This initiative is a direct implementation of a cooperative strategy to increase critical mass and generate demand in the Western Sydney Area.

This initiative has a direct alignment to Strategic Directions 1 (Destination Marketing), 3 (Product Development), 4 (Destination Awareness) and 5 (Grow Major Events) of the DNSW Strategy.

The Applicant envisages creating a schedule of community events such as an exhibition at a public space to promote notable commemorative days. Collaborating parties will agree to a joint ticket offer during a set period. This opportunity would provide visitors with a subsequent reason to visit the participating facilities and also provide added exposure generally.

The Applicant has already contributed to a number of events including:

EVENT	DATE	STATUS
Western Sydney Parklands 50 Year Celebration	21 July 2018	COMPLETED
Special Olympics Australia Roar and Soar	9 December 2018	COMPLETED
RunWest	31 March 2019	COMPLETED & SCHEDULED FOR 4 YEARS
[REDACTED]	[REDACTED]	[REDACTED]

Table 14: The Applicants contribution to major events in Western Sydney

This will continue to be an ongoing year-round activity for the Development once it commences operation.

## 6.4. Cooperative Marketing and Content Creation

Through strategic alliances and formal partnerships, the Applicant is working in a collaborative capacity to market Western Sydney to improve the critical mass, awareness and perceptions of the region. This initiative will assist to highlight the multiple offerings that are available to visitors in the Western Sydney area and will have a direct positive impact by increasing total visitation across the cluster and providing a critical mass of activities that encourages visitors to extend their visit by one or more days and make return visits.

This initiative has a direct alignment to Strategic Direction 4 (Destination Awareness).

This is a broad area for collaboration that will usually involve the co-creation and funding of content to market the respective products of the parties as well as the Western Sydney region.

Cooperative marketing and content creation will be a year-round activity and the Applicant will work with its partners to deliver prior to the commencement of operation and on an ongoing basis.

The Applicant has also partnered with [REDACTED] to develop an Aboriginal Cultural Experience for its Australiana exhibit region. This aligns with Strategic Direction 3 (Product and Experience Development) by delivering a new visitor experience to the Western Sydney tourism market.

The Aboriginal Cultural Heritage Experience is a multi-layered experience developed in consultation with local Darug people and implemented in partnership with [REDACTED]. It is built around the concept of the “Bungarrabee Trail” whereby Sydney Zoo has worked with Darug people to develop signage and interpretive materials throughout the Australiana section of the zoo that educates people about Aboriginal culture and way of life – with a specifically Darug emphasis. This includes:

- bush and medicines, with a series of plants throughout the trail illustrating how Aboriginal people utilised different plants
- educating people about songlines and the role that they played in passing knowledge from generation to generation
- creation stories and lore stories that demonstrate the Aboriginal way of life and ethos around conservation
- An Aboriginal gunya and camp (including a midden) that is designed to demonstrate how Aboriginal people moved seasonally throughout their territories and the seasonal cues that they took from the land to guide them as to different food availability during the year

The Experience can be either self-guided or provided by an Aboriginal guide to provide additional context. Supporting materials that align with the NSW school curriculum are also under development to allow student participation. The Aboriginal Cultural Heritage Experience will operate from the commencement of operations. Once open the Bungarrabee trail will likely be one of the largest Aboriginal cultural experiences in Australia by visitor numbers. For a full description refer to Appendix M.

## 6.5. Tourism Business Leaders Think Tank

The Applicant has established the Western Sydney Business Tourism Leaders Think Tank as a new semi-annual conference for Western Sydney. This initiative is designed to improve the personal contacts and trust that are a key enabler for co-operative behaviour in cluster theory

This initiative has a direct alignment to Strategic Direction 1 (Destination Marketing) and also contributes meaningfully to several other Strategic Directions.

The inaugural conference was held on December 18, 2018 with a theme of “*Working together to grow the visitor economy*”<sup>20</sup> and was attended by Mr Brendon Noney (Director of Western Sydney Business Connection) and brought together local tourism business leaders in a think tank environment to meet and connect with other tourism business leaders from the region and develop ideas for collaboration. The central purpose of the Think Tank is to bring relevant parties together to develop a cohesive approach and thereby maximise the potential benefit for the Western Sydney Visitor Economy.

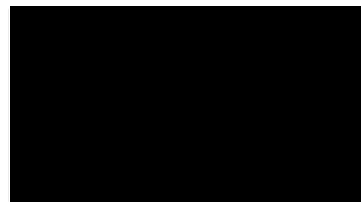
This event will be held semi-annually.

The 2018 event included representatives from the following Western Sydney businesses:

- █ [Redacted]
- █ [Redacted]
- █ [Redacted]
- █ [Redacted]
- █ [Redacted]
- █ [Redacted]
- █ [Redacted]
- █ [Redacted]

The next event is to be hosted by [Redacted]

<sup>20</sup> A copy of the Western Sydney Business Tourism Leaders Think Tank invitation is attached as Appendix H.



8 April 2019

Ms Chloe Dunlop  
Senior Planning Officer, Industry Assessments  
Department of Planning & Environment  
GPO Box 39, SYDNEY NSW 2001

Dear Ms Dunlop

**Western Sydney Tourism Business Leaders “Think Tank”**

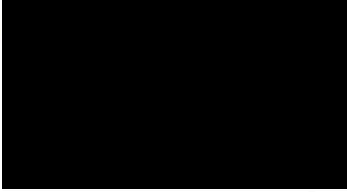
I have been requested by Sydney Zoo to provide my views and feedback on the Western Sydney Tourism Business Leaders Think Tank and other initiatives established and contributed to by Sydney Zoo.

I am the Chairman of the [REDACTED] exists to create opportunities for Western Sydney’s business leaders to connect with like-minded individuals and foster valuable relationships. We do this through hosting the region’s leading business events, working with government and by strategically bringing individuals and organisations together to facilitate growth.

[REDACTED] is also the driving force with industry participants, including Sydney Zoo, in the creation of Sydney’s West – the first and only dedicated app providing a visitor support facility which allows tourists, residents and short-term visitors to access facilities, activities and events in Sydney’s west at any time and in real time. The [REDACTED] was part of a strategy developed with the input of industry participants, including Sydney Zoo, and supported by Destination NSW having been personally launched by the then Minister for Tourism and Major Events, The Hon. Adam Marshall MP. The strategy and app were designed to attract interstate and local event marketing funding including the commencement and initiation of an intra and interstate direct marketing campaign, a campaign to position the region’s event calendar and to elevate its importance as a leisure destination, amongst other things.

Since its inception, Sydney Zoo has advocated for a more coordinated approach between tourism operators to grow the emerging tourism sector in Western Sydney. The team at Sydney Zoo have taken a position of leadership in promoting interfacility cooperation, including commencement of the semi-annual “Think Tank” bringing tourism operators from throughout Western Sydney together to promote common interests and start working together to promote the Western Sydney region.

I was to take part in the inaugural Think Tank as the key note speaker and I believe this initiative has contributed to better communications and discussions between several facilities to the benefit of the Western Sydney region. As validation of this statement, I understand that the second Think Tank is planned to be hosted by Wet N Wild in April/May of this year. The fact that the event is



continuing and has been adopted by other operators in the area is a good benchmark for its value to the local tourism sector and is a demonstration of the galvanising of the tourism sector in Western Sydney; something that has not ever occurred before in a meaningful way. The initiative is steered by Sydney Zoo and is industry led with the goal of promoting Western Sydney as a great destination to stay and play. The Think Tank promotes discussion on how best to collaborate with and leverage the local tourism assets to see the industry in the region realise its full potential. It presents an opportunity to take advantage of the infrastructure, capital investment and government planning taking place more broadly for Western Sydney so that the visitor economy can flourish even more over the coming years.

Sydney Zoo will be a much-needed world class facility attracting more tourists to Western Sydney. They have consulted widely with a broad range of participants in the tourism sector and are actively working to promote Western Sydney as a destination, which should benefit all operators in the area.

Yours sincerely



Figure 11: Letter of support from 

## 6.6. Jointly Funded Transport

The Applicant is seeking to collaborate with a range of local facilities in Western Sydney to develop privately funded transport options to supplement existing public transport infrastructure. The Applicant is also seeking to expand public transport services for the Western Sydney area e.g. extending the Parramatta Light Rail from Westmead into the emerging Blacktown tourism precinct. Cluster theory postulates that spatial proximity and being located en-route to an attraction or in a logical sequence can draw more visitors to an attraction than would otherwise be the case. Improved accessibility will augment this effect while cooperation between facilities will lower costs for the individual participants.

These initiatives have a direct alignment to Strategic Direction 2 (Destination Infrastructure).

Public transport access to many Western Sydney businesses is limited, especially during peak periods of visitation such as weekends and public holidays, which are known to be critical business periods for recreational facilities in Western Sydney. Services run to a limited schedule during weekends with the time between one service to another typically being one hour. Whilst the public bus (Route 729) does service the Development, its service level is perceived to be a deterrent to families wanting to visit the Development and the Applicant has initiated discussions with the NSW Department of Transport to improve the frequency of this

service. Furthermore, there are limited options for free independent travellers willing to travel to Western Sydney from the central business district.

To address these issues, the Applicant is proposing that local facilities collectively run a “hop-on, hop-off” private shuttle service during peak periods to service the direct geographical area surrounding the Development. It is proposed that this route would encompass four main facilities including the Development, [REDACTED]

The service would originate from Blacktown station approximately on the route outlined below:

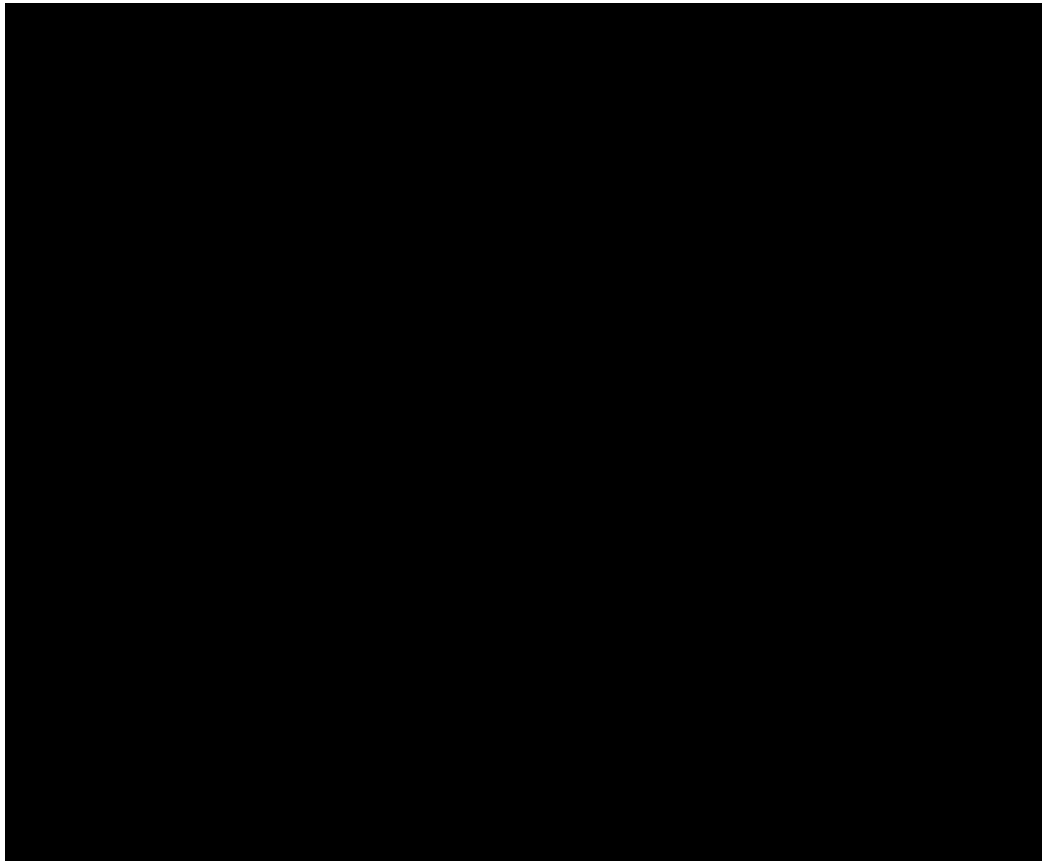


Figure 12: Proposed shuttle bus route

The Applicant is seeking to jointly investigate the options for this service with a view to sharing costs for a 3-month trial, which if the participating parties agree, is intended to commence with [REDACTED]

The service is unlikely to require the participation of all facilities to be viable, but higher participation rates increase the usage and lower the costs of service to individual facilities. The data with respect to patronage for each facility during the trial would be jointly collated. Each party would be in a position to assess the benefits of the service and make a decision to continue to jointly fund the initiative or withdraw from the service.

## 6.7. Jointly Run Animal Welfare Programs

The Applicant has proposed the establishment of jointly run animal welfare programs to Featherdale. This initiative is an example of knowledge transfer and joint problem solving that

should also over time create personal connections and trust between the institutions that will promote wider cooperation in marketing initiatives.

The Applicant and [REDACTED] are both member institutions of the Zoo and Aquarium Association (ZAA). ZAA members are obligated under the ZAA constitution to cooperate and plan to manage the populations of wildlife they hold in ways that improve their sustainability and their conservation value.

The Applicant has proposed to [REDACTED] the establishment of an operating approach whereby both parties can collaborate on conservation and animal welfare matters. This initiative would be a continuing project that would commence once the Development is operating.

### 6.8. Success to Date

The ultimate measure of success of these initiatives in promoting regional tourism in Western Sydney is market acceptance, as measured by the number of MOUs signed.

The table below summarise the joint initiatives agreed by the Applicant and potential partners:

#### Memorandum of Understanding – Joint Initiatives

	SPONSORSHIP RIGHTS	JOINT TICKETING	DATABASE SHARING	CONTENT SHARING	RECIPROCAL SOCIAL MEDIA POSTS	SIGNAGE	EVENT COLLABORATION
[REDACTED]	✓	✓	✓	✓	✓	✓	✓
[REDACTED]	[REDACTED]						
[REDACTED]	✓	✓	✓	✓	✓	✓	✓
[REDACTED]	✓	✓	✓	✓	✓	N/A	✓
[REDACTED]	[REDACTED]						
[REDACTED]	✓	✓	✓	✓	✓	✓	✓
[REDACTED]	[REDACTED]						
[REDACTED]	N/A	N/A	✓	✓	✓	✓	✓
[REDACTED]	✓	✓	✓	✓	✓	N/A	✓
[REDACTED]	✓	✓	✓	✓	✓	✓	✓
[REDACTED]	✓	✓	✓	✓	✓	✓	✓
[REDACTED]	✓	N/A	✓	✓	✓	✓	✓
[REDACTED]	[REDACTED]						
[REDACTED]	✓	✓	✓	✓	✓	✓	✓

■ Accepted     ■ Negotiating

Figure 13: Summary of co-operation initiatives in MOUs

Copies of the MOUs signed with each organisation are provided in Appendix K.



## 6.9. Business/Industry Organisations

The Applicant has taken steps to support relevant business and industry organisations, including:

- Being an active financial member of the Western Sydney Business Connection;
- Co-funding the development of the Sydney's West app in conjunction with Western Sydney Business Connection;
- Accepting an invitation from [REDACTED] to showcase the Development at [REDACTED] and [REDACTED];
- Consulting Destination NSW on initiatives to grow the Western Sydney Visitor Economy to ensure alignment with the DNSW Strategy.

These initiatives align to Strategic Direction 1 (Cohesive Approach to Destination Management and Marketing) and Strategic Direction 4 (Develop Destination Awareness and Improve Perception).

## 6.10. Skills Development

The Applicant is making a material contribution to the development of training opportunities to ensure that skills are in place in Western Sydney to support growth of the Western Sydney Visitor Economy, in line with Strategic Direction 9 (Skills).

Specific initiatives include:

- The Applicant's partnership with Western Sydney University to establish [REDACTED] scholarships in tourism/zoology with a total value of [REDACTED] and an additional [REDACTED] internships for undergraduate and postgraduates. The Applicant is currently interviewing candidates for the first two scholarships.
- The Applicant's staff will undertake a 6 unit part-qualification training program as set out by Training Services NSW and endorsed by NSW Department of Primary Industries.
- The Applicant's staff will undertake Cert III and IIII qualifications for a range of different subject matters.
- The Applicant will be making a range of traineeship positions available across zoology and customer service positions.
- The Applicant is targeting [REDACTED] of its workforce to be Indigenous.
- Through its partnership with [REDACTED] trainee Aboriginal Guides will undertake a Cert III in Guiding.

## 6.11. Education

The Development will deliver significant outcomes for the educational sector, particularly primary and secondary schools located in Western Sydney. This includes curriculum matched school materials for geography, conservation and Aboriginal culture

The Applicant is developing Sydney's only integrated Aboriginal education program for primary and secondary schools in partnership with [REDACTED] – an outline of the program being developed is provided in Appendix M (commercial in confidence). The Applicant is also

partnering with [REDACTED] to develop educational material for use in the Development.

The implementation of the schools program will commence from the opening of the zoo.

These initiatives align strongly with Strategic Direction 7 (Develop the Education Tour Sector).

## 7. Outcomes – Benchmarking Success

**“Detail the success or otherwise of these initiatives using recognised social indicators”**

In addition to the MOUs it has signed with local Western Sydney tourism operators the Applicant has undertaken a large number of direct initiatives to promote and enhance tourism in the region. The most relevant, objective indicator of the success of these initiatives is an assessment of their contribution to the Strategic Directions identified in the *Western Sydney Visitor Economy Strategy 2017/18 – 2020/21 (DNSW Strategy)*.

The DNSW Strategy was developed after consultation with more than 106 stakeholders and identifies 9 Strategic Directions to drive growth in the Western Sydney Visitor Economy. The objectives of the DNSW strategy therefore align almost exactly with the objectives of the Applicant’s initiatives described in this paper and Condition C9 of the Applicants Development Consent.

The Applicant has made a substantive contribution to each of the Strategic Directions with the exception of Strategic Direction 9 (Medical Tourism) which is not relevant to a zoo. This contribution is likely to increase substantially once the Development is operating.

Summarised below is an assessment of the initiatives undertaken by the Applicant against the Strategic Directions.

The measurement of success of the initiatives to date is tabulated below. Many of the initiatives are on-going and are expected to contribute substantially to the growth of tourism in Western Sydney over time.

INITIATIVE	OBJECTIVE	OUTCOMES TO DATE	MEASUREMENT OF SUCCESS
<b>JOINT TICKETING</b>	Partner with other facilities to offer multi-venue tickets at discounted price in wholesale and retail markets to enhance appeal and increase visitation.	<ul style="list-style-type: none"> <li>8 of 9 parties have agreed to issue joint tickets with the Applicant and have signed MOUs giving effect to this agreement.</li> </ul>	<ul style="list-style-type: none"> <li>Number of joint ticketing arrangement agreed</li> <li>Once the Development is operating, the number of joint tickets sold</li> </ul>
<b>TRANSPORT</b>	Expand public transport options and/or supplement with privately funded options.	<ul style="list-style-type: none"> <li>Initiated discussions with NSW Department of Transport to expand Route 729 service</li> <li>Engaged with Parramatta Light Rail Team to extend service further West to include locality of the Development</li> </ul> <p>[REDACTED]</p> <p>[REDACTED]</p>	<ul style="list-style-type: none"> <li>Establishment of expanded services to address demand driven by tourism businesses</li> </ul>
<b>LOCAL EVENTS AND FESTIVALS</b>	Create/support new events and festivals in Western Sydney to develop awareness and increase visitation	<ul style="list-style-type: none"> <li>Participated in Western Sydney Parklands 50 Year Celebration in July 2018</li> <li>Participated in Special Olympics Australia Roar and Soar in December 2018</li> <li>Co-hosting RunWest in March 2019 and next 4 years</li> </ul> <p>[REDACTED]</p> <p>[REDACTED]</p>	<ul style="list-style-type: none"> <li>Number of events created or supported</li> <li>Participant numbers</li> </ul>
<b>COOPERATIVE MARKETING AND CONTENT CREATION</b>	Work with other facilities to develop marketing material to raise awareness and increase visitation	<ul style="list-style-type: none"> <li>Partnering with [REDACTED] to develop Aboriginal Cultural Experience</li> </ul> <p>[REDACTED]</p>	<ul style="list-style-type: none"> <li>Increased demand from interstate and international tourists</li> </ul>

		internationally as the <i>Sydney Iconic Experience</i>	
<b>THINK TANK</b>	Engender collaboration amongst local recreational facilities and develop initiatives to grow Western Sydney Visitor Economy	<ul style="list-style-type: none"> <li>Established Western Sydney Tourism Business Leaders Think Tank held in December 2018</li> <li>[REDACTED]</li> <li>Semi- annual event</li> <li>Has ignited discussions/collaboration amongst other participants</li> </ul>	<ul style="list-style-type: none"> <li>Level of participation in Think Tank by local businesses</li> <li>Establishment of strategic partnerships with the Applicant</li> <li>Establishment of strategic partnerships between other parties</li> </ul>
<b>JOINT ANIMAL WELFARE PROGRAMS</b>	Achieve higher goals through collaboration and provide mutual support	[REDACTED]	<ul style="list-style-type: none"> <li>Establishment of joint initiatives</li> </ul>
<b>BUSINESS/ INDUSTRY ORGANISATIONS</b>	Support business associations and other advocates to develop initiatives to grow Western Sydney Visitor Economy	<ul style="list-style-type: none"> <li>Financial member of Western Sydney Business Connection</li> <li>Co-funded development of Sydney's West app with Western Sydney Business Connection</li> <li>[REDACTED]</li> <li>Consulted Destination NSW on initiatives to grow Western Sydney Visitor Economy</li> <li>Supported call by Western Sydney Business Chamber for the creation of Destination Network Western Sydney (as proposed by DNSW Strategy)</li> </ul>	<ul style="list-style-type: none"> <li>Participation in initiatives lead by business associations and government bodies</li> </ul>
<b>SKILLS</b>	Develop skills and training to support growth of the Western Sydney Visitor Economy	<ul style="list-style-type: none"> <li>Established [REDACTED] scholarships and [REDACTED] internships in tourism and zoology in partnership with Western Sydney University</li> <li>Partnering with [REDACTED] to allow trainee Aboriginal guides to undertake a Cert III qualification in Guiding</li> </ul>	<ul style="list-style-type: none"> <li>Establishment of scholarships and internships</li> <li>Number of employees and partners of the Applicant achieving recognised qualifications</li> </ul>

<p><b>EDUCATION</b></p>	<p>Develop education product for Western Sydney, particularly for schools</p>	<ul style="list-style-type: none"> <li>• Developing Sydney's only integrated Aboriginal education program for primary and secondary schools in partnership with [REDACTED]</li> <li>• Partnering with Western Sydney University to develop educational material</li> </ul>	<ul style="list-style-type: none"> <li>• Establishment of educational opportunities for primary and tertiary school students</li> <li>• Number of school students attending the Development for education purposes</li> </ul>
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Table 15: List of Sydney Zoo strategic initiatives, benefits, measures of success and partner organisations.

## 7.1. DNSW Strategic Direction 1

### **STRATEGIC DIRECTION 1 - A cohesive approach to destination management and marketing through Government, industry and commercial partnerships**

- Establish a common goal and gain buy-in and commitment from all Western Sydney stakeholders to work together to grow the Western Sydney visitor economy.
- Develop a strong collaborative network of Government, industry and commercial partners to realise the potential of the Western Sydney visitor economy.
- Establish a common framework for delivering opportunities and Destination Management Plans, campaigns and product offerings.

Action	Benefit
<p>The Applicant has partnered with various Western Sydney businesses and has executed [REDACTED]</p>	<p>The MOUs will improve communication, information sharing and lead to joint marketing initiatives that generate consumer demand, broaden the appeal of the Western Sydney tourism offering, and potentially create critical mass of visitors to the developing Western Sydney tourism cluster. This should lead to increased visitation to the region overall and an increase in overnight visitor expenditure.</p>
<p>The Applicant has established a strategic alliance with a number of businesses and is working towards a formalised [REDACTED]</p>	<p>Collaborative communications that will provide for bundling of attractions with accommodation and major events to increase visitor nights and time spent in the Western Sydney area</p>
<p>The Applicant is a financial member of Western Sydney Business Connection (WSBC)</p>	<p>Cross communication and support of industry networking; Support for a cohesive approach to advocacy for the Western Sydney visitor economy</p>
<p>The Applicant provided seed funding to establish Western Sydney Business Connection to enable the creation of Sydney's West app <a href="https://www.appspeople.com.au/mobile-apps/sydney-west-app">https://www.appspeople.com.au/mobile-apps/sydney-west-app</a></p>	<p>Direct and early financial contribution to the creation of a Precinct Identity "Sydney's West" and consumer communications about the recreation opportunities in the Western Sydney area</p>
<p>[REDACTED]</p>	<p>Contribution to the creation of a precinct identity and consumer communications about what is on offer in Western Sydney</p>
<p>The Applicant is actively working with Blacktown Council and is scheduled to participate at various local events</p>	<p>Activation and support of precinct activities that assists creation of a precinct identity and collectively supports visitor oriented businesses</p>

Table 16: Actions and benefits for DNSW Strategic Direction 1.



## 7.2. DNSW Strategic Direction 2

### STRATEGIC DIRECTION 2 - Destination Infrastructure Development

- Assist the development of business cases that promote investment by Government and the private sector in areas critical to growing the Western Sydney visitor economy.

Action	Benefit
Ongoing liaison with NSW Department of Transport to improve 729 bus route	Demand Driver: Improvements in accessibility for the Development and all attractions along the route, including Featherdale and the Western Sydney Parklands
The Applicant has engaged with the Parramatta Light Rail team including a site tour of the Development. The Applicant is continuing conversations to extend the light rail further west to service the development and neighbouring tourism destinations	Infrastructure improvement and long term demand driver: Lobbying for improved accessibility for the Western Sydney Corridor of attraction including ██████████ the Development and Western Sydney Parklands
Collaboration with Sydney ██████████ – an agreement to provide overflow carparking has been put in place	Improved accessibility and infrastructure, cost sharing between institutions and increasing profile and collaboration between the Development and ██████████
Proposed “hop on hop off” bus route sharing with other local facilities - ██████████ ██████████ This route would run during peak periods, every 15-30 mins, linking Blacktown station with the participating facilities in a loop route.	Improved accessibility for all major operators in the immediate precinct around Blacktown

Table 17: Actions and benefits for DNSW Strategic Direction 2.

### 7.3. DNSW Strategic Direction 3

#### STRATEGIC DIRECTION 3 - Product and Experience Development

- Improve Western Sydney’s tourism offering through product and experience development, leveraging existing strengths and building on these to address current gaps and options for future opportunities.

Action	Benefit
The Development brings to Western Sydney a full and complete zoo experience including both exotic and Australian animals as well as a large-scale aquarium	The Development will, in and of itself be a demand generator that will assist in promoting and increasing tourism to Western Sydney
The Development will introduce Sydney’s only integrated Aboriginal education program for primary and secondary schools supported by the Applicant’s partnership with [REDACTED]	Demand for cultural tourism and experiences is increasing, and the Development will be the largest scale Aboriginal tourism offering in Western Sydney, raising the profile of the area with local, interstate and international visitors.
The Applicant has agreed to a 5 year deal to be a venue as part of RunWest commencing in 2019	A collective event with [REDACTED] that creates new community and recreational opportunities, showcases the offering of all participants and raises the profile of the Western Sydney area.
Joint ticketing initiatives	Joint ticketing initiatives offering packaging options and discount pricing to further develop the range of tourism product offerings

Table 18: Actions and benefits for DNSW Strategic Direction 3.

## 7.4. DNSW Strategic Direction 4

### STRATEGIC DIRECTION 4 - Develop Destination Awareness and Improve Perception

- Define and gain stakeholder buy-in to a common definition of Western Sydney.
- Improve awareness and perceptions of Western Sydney by developing a consistent brand and marketing plan across the different elements of the visitor economy.
- Focus all resources on the markets offering the best potential for Western Sydney, in line with Destination NSW’s established market prioritisation.

Action	Benefit
Financial member of Western Sydney Business Connection	Improves and supports communication and information sharing amongst businesses and tourism operators in Western Sydney
Funding partner of Western Sydney Business Connection’s Sydney’s West app	Direct and early financial contribution to the creation of a Precinct Identity “Sydney’s West” and consumer communications about the recreation opportunities in the Western Sydney area
The Applicant is working in partnership with [REDACTED] to jointly market the Development and their attractions internationally as the <i>Sydney Iconic Experience</i>	Creation of a corridor of linked attractions from East to West that provides continuity, bundling opportunities for tourists and will assist in drawing tourists into the Western Sydney region to collaborative international marketing efforts
Ongoing Community Consultation program to engage the local community.	Highlighting the development progression, job opportunities and management of perceptions and awareness of the tourism opportunities in Western Sydney
Executed 9 MOUs with differing tourism operators	Extension of marketing reach and creation of critical mass to ensure cross fertilization and generate increased awareness, participation and demand for tourism product in the Western Sydney region
Joint ticketing initiatives	Joint ticketing initiatives offering packaging options and discount pricing to further

	develop the range of tourism product offerings
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Table 19: Actions and benefits for DNSW Strategic Direction 4.

## 7.5. DNSW Strategic Direction 5

### STRATEGIC DIRECTION 5 - Secure and Grow Major Events

- Leverage existing major events and elevate the local experience.
- Continue to attract and develop new major events to Western Sydney.

Action	Benefit
The Applicant has agreed to a 5 year deal to be a venue as part of RunWest commencing in 2019	A significant new community and tourism event that will raise the profile of Western Sydney and highlight the attractions in the area
[REDACTED]	Creation of a new event increase participation and awareness of the tourism opportunities in Western Sydney
[REDACTED]	Creation of new events to increase participation and awareness of the tourism opportunities in Western Sydney

Table 20: Actions and benefits for DNSW Strategic Direction 5.

## 7.6. DNSW Strategic Direction 6

### STRATEGIC DIRECTION 6 - Secure and Grow Business Events

- Develop and implement a co-ordinated plan and approach for Western Sydney to maximise the opportunity presented by the business events sector.

Action	Benefit
<p>Western Sydney tourism businesses were invited to attend the inaugural Western Sydney Tourism Business Leaders Think Tank to allow introductions and connections with other businesses in the region. The workshop was held on Tuesday 18 December, 2018 at the Alpha Hotel.</p>	<p>Promotion of the exchange of ideas and issues to build relationships and trust that will enable deeper collaboration between tourism institutions in Western Sydney</p>
<p>The Applicant is presently in discussions with [REDACTED] to host their annual major fundraising event, with attendance of over a hundred of Australia’s most recognised business leaders.</p>	<p>Use of the aesthetics, scale and size of the facility to promote corporate events held by third parties</p>
<p>The Applicant is seeking to host an upcoming Zoos and Aquariums Association conference, and has already hosted a NSW Fauna and Marine Parks Association meeting.</p>	<p>Improved tourism activity through the hosting of industry conferences that include participants throughout NSW and Australian and New Zealand</p>
<p>Sydney Zoo restaurant has a 300 seat capacity that can be readily used for conferences and business functions outside of normal operating hours. Sydney Zoo has also extensive outdoor picnic areas with full service kiosks for further functions. Sydney Zoo is in discussions with major conference providers such as [REDACTED] for the provisions of “add-on” experiences to conferences held primarily at other venues</p>	<p>Working collaboratively to enhance the attractiveness of existing conference facilities by broadening the appeal and range of activities on offer at conferences</p>

Table 21: Actions and benefits for DNSW Strategic Direction 6.

## 7.7. DNSW Strategic Direction 7

### STRATEGIC DIRECTION 7 - Develop the Educational Tour Sector

- Develop and implement a strategy for Western Sydney to maximise the opportunity presented by growing the educational tour sector, including primary, secondary and tertiary students and heritage and cultural tours.

Action	Benefit
The Applicant will introduce Sydney's only integrated Aboriginal education program for primary and secondary schools supported by [REDACTED]	Demand for cultural tourism and experiences is increasing, and the Development will be the largest scale Aboriginal tourism offering in Western Sydney
The Applicant has executed a partnership agreement with Western Sydney University which includes the development of education material	Improved accessibility of high quality educational tourism for students through proximity for the people of Western Sydney

Table 22: Actions and benefits for DNSW Strategic Direction 7

## 7.8. DNSW Strategic Direction 8

### STRATEGIC DIRECTION 8 - Develop Medical Related Tourism

- Research, develop and implement a strategy for Western Sydney to maximise the opportunity presented by the three planned new medical precincts at Westmead, Penrith and Liverpool.

→ Not applicable to the Development

## 7.9. DNSW Strategic Direction 9

**STRATEGIC DIRECTION 9 - Industry Skills Development**

- Ensure the necessary skills and training are in place across all areas that are critical to supporting the growth of the Western Sydney visitor economy.

Action	Benefit
The Applicant’s partnership with Western Sydney University includes ■ scholarships in tourism/zoology and an additional ■ internships for undergraduate and postgraduates.	The Development has the largest internships and scholarships program of any tourism facility in Western Sydney. The Development is the only tourism facility with a formal alliance with Western Sydney University. Provides training and jobs support for students, and skills development for the Western Sydney area.
The Applicant’s staff will undertake a 6 unit part-qualification training program as set out by Training Services NSW and endorsed by Department of Primary Industries	Improved depth of quality trained staff in support of the growth of tourism businesses in Western Sydney.
The Applicant’s staff will undertake Cert III and IIII qualifications for a range of different subject matters	Improved depth of quality trained staff in support of the growth of tourism businesses in Western Sydney.
The Applicant will be making a range of traineeship positions available across zoology and customer service positions	Improved depth of quality trained staff in support of the growth of tourism businesses in Western Sydney.
The Applicant is targeting ■ of its workforce to be Indigenous	Improved depth of quality trained staff the Western Sydney area with particular focus on enabling better service in the educational and cultural tourism sectors
Through its partnership with ■ trainee Aboriginal Guides will undertake a Cert III in Guiding	Improved depth of quality trained staff the Western Sydney area with particular focus on enabling better service in the educational and cultural tourism sectors

Table 23: Actions and benefits for DNSW Strategic Direction 9

## 8. Additional Activities

**“Include detail of the additional activities that will be undertaken for the duration of the Development”**

Whilst this Report details initiatives undertaken by the Applicant in the period since the Development Consent was granted, it should be noted that many of these initiatives are ongoing and will increase in scope and intensity once the Development is built and operating.

The table below summarises the duration of each initiative and the further actions that the Applicant expects to take once the Development is operational.

INITIATIVE	DURATION	FURTHER ACTIONS
JOINT TICKETING	Ongoing	<ul style="list-style-type: none"> <li>Expand participants</li> <li>Finalise ticket offerings once Development is open and experience is understood by market</li> </ul>
TRANSPORT	Ongoing	<ul style="list-style-type: none"> <li>Demonstrate demand for new/expanded services once Development is open</li> <li>Implement trial for private shuttle options with a view to moving to permanent arrangement</li> </ul>
LOCAL EVENTS AND FESTIVALS	Commenced and ongoing	<ul style="list-style-type: none"> <li>Implement agreed arrangements – eg RunWest 5 year term</li> <li>Identify new opportunities that align to Development’s offerings once Development is open and experience is understood by market</li> </ul>
COOPERATIVE MARKETING AND CONTENT CREATION	Ongoing	<ul style="list-style-type: none"> <li>Expand participants</li> <li>Develop new opportunities once Development is open and experience is understood by market</li> </ul>
THINK TANK	Inaugural event in Dec 2018. A semi-annual event going forward	<ul style="list-style-type: none"> <li>Expand participants</li> <li>Develop and implement new collaborative initiatives to drive growth of the Western Sydney Visitor Economy</li> <li>The next event is to be hosted by [REDACTED] and is [REDACTED].</li> </ul>
JOINT ANIMAL WELFARE PROGRAMS	Ongoing	<ul style="list-style-type: none"> <li>Expand participants</li> <li>Develop new initiatives once animals located at Development and curatorial staff in place</li> </ul>
BUSINESS/INDUSTRY ORGANISATIONS	Ongoing	<ul style="list-style-type: none"> <li>Continue to support existing organisations</li> </ul>
SKILLS	Ongoing	<ul style="list-style-type: none"> <li>Continue support for WSU and vocational skills development</li> </ul>



<b>EDUCATION</b>	Ongoing	<ul style="list-style-type: none"> <li>• Maintain currency of educational program at the Development</li> <li>• Identify underserved schools in the locality</li> </ul>
<b>Product Diversification</b>	Ongoing from 2020	<ul style="list-style-type: none"> <li>• Sydney Zoos operational hours currently do not allow for overnight stay attractions under its current development consent. This initiative remains of interest to Sydney Zoo in the longer term, but will be subject to an amended consent to be implemented.</li> </ul>

*Table 24: Future actions the applicant intends to pursue to promote Western Sydney tourism*

## 9. Appendices

### **Appendix A**

Sydney Zoo site plan

### **Appendix B**

The Applicant's proposal to [REDACTED]

### **Appendix C**

Destination NSW Western Sydney Visitor Economy Strategy 2017/18 – 2020/21

### **Appendix D**

Destination NSW letter of support

### **Appendix E**

Western Sydney Business Connection letter of support

### **Appendix F**

Ellaslist Research Report

### **Appendix G**

Chronological Account of Interactions between the Applicant and Featherdale

### **Appendix H**

Western Sydney Business Leaders Think Tank Invitation

### **Appendix I**

Email correspondence between the Applicant and Featherdale

### **Appendix J**

Featherdale – Sydney Zoo Meeting Minutes

**Appendix K**

Memorandums of Understanding

**Appendix L**

Case Study - RunWest

**Appendix M**

Western Sydney Business Chamber Press Release dated 19 February 2019

**Appendix N**

“Bungarribee Dreaming” – Aboriginal Cultural experience