



The Planning Assessment Commission
Level 3, 201 Elizabeth Street,
Sydney NSW 2000

Att: David Mooney
Via email

10th August 2017

<Without Prejudice>

Dear Mr Mooney

The Sydney Zoo – D440/16 – amendment of proposal

This letter has been prepared by Sydney Zoo on a 'without prejudice' basis for the purpose of undertaking discussions with the Planning Assessment Commission (PAC) in relation to D440/16. It is not a binding proposal or submission.

Facility Differentiation

The proposed facilities comprising Sydney Zoo will ensure that the product offering of Sydney Zoo is materially differentiated from Featherdale across a number of key areas:

Offering	Differentiation	DA/Consent Condition
Animals	Sydney Zoo will have both exotic and Australian animals	Inherent in facility design
Australian Exhibit Area	Sydney Zoo's Australian Exhibit Area will be less than 1.6ha	Inherent in facility design Draft Condition B6
Australian Exhibit Infrastructure	Sydney Zoo's Australiana exhibits will include major Aquarium, Reptile House and Insectarium, and Nocturnal House	Inherent in facility design
Aviaries	Sydney Zoo will not include any material enclosures for Australian flighted birds	Inherent in facility design
Educational Amphitheatre	Sydney Zoo will include a large capacity amphitheatre suitable for educational displays	Inherent in facility design



Whilst the areas of differentiation highlighted above are inherent in the facility design as submitted for approval, Sydney Zoo understands that the PAC wishes to ensure that the differences are maintained. To this end, **Sydney Zoo is prepared to modify its proposal and undertake that prior to the commencement of operations:**

1. **Sydney Zoo shall have at least 2/3 of the exotic species specified in the development plans and submissions to the PAC on-site;**
2. **The Australian exhibits will include the Aquarium, Reptile house & Insectarium, and Nocturnal House; and**
3. **For a period of three years after the commencement of operations, the facility shall not include aviaries housing flighted species (i.e. species other than ratites or penguins).**

Product Differentiation – Australian Animals

Whilst the details of Sydney Zoo’s entire product offering have not been finalised and are not the within the scope of the Development Application, Sydney Zoo has included a proposal that our Australian Animal Collection will be displayed as part of an Aboriginal Cultural Experience. This is a significant point of differentiation from the current Featherdale product offering and is addressed by draft conditions B6 and C21 proposed by DP&E in its assessment report.

Sydney Zoo understands that the PAC also considers that a significant point of differentiation at Featherdale may include its animal display strategy. While Featherdale has a marketing pitch that positions it as a leader in animal interaction, in fact every facility in the Greater Sydney region offers some sort of animal interaction or walk through experience, as summarised below:

Facility	Koala Encounter	Walk-through Australian	Exotic animal experience	Other
Featherdale	Yes	Yes	No	Breakfast with koala, Other animal encounters
Taronga	Yes	Yes	Yes	Keeper for a day
WILDLIFE Sydney Zoo	Yes	Yes	No	Breakfast with koala, Other animal encounters
Australian Reptile Park	Yes (Part of little kids to keepers)	Yes	Yes	Little kids to keepers
Symbio Zoo	No	Yes	Yes	Keeper for a Day
Calmsley Hill City Farm	No	Yes	No	
Koala Park Sanctuary	Yes	Yes	No	

Sydney Zoo has undertaken a detailed web-based assessment of the interaction opportunities currently available at various zoos and wildlife parks in Sydney. This investigation illustrates that there is an extensive array of interactive experiences offered by zoos and wildlife parks in Sydney. We can provide further details should the PAC request it.



We understand that one area of particular focus for the PAC has been Featherdale's differentiation in the area of Koala Encounters – currently comprising its newly created 'Personal Koala Encounter' and 'Breakfast with Koalas' offerings.

Until approximately September 2016, Featherdale was one of only two facilities in the Sydney market that offered Koala encounters as part of the price of entry to the park.

This option is no longer available at Featherdale. Koala encounters are now a separately charged experience, additional to the cost of entry.

With the addition of separate pricing for an encounter, Featherdale's Koala interactions are now substantively similar to several other zoos and wildlife parks in Sydney.

A recent posting by Featherdale on TripAdvisor confirms that this is the case (posted 5th August 2017):

PERSONAL KOALA ENCOUNTER

Australia's most prized fluffy icon, an encounter with a Koala is a must-do experience during your Aussie stay. Starting from \$20.00, you can have an up-close encounter with one of Featherdale's adorable Koalas! Touch around the lower body and have your photo taken by our expert photographers so you can take home a photography package, as the ultimate souvenir of your visit to Featherdale!

Price:

Packages start at \$20.00* (excludes admission)

Inclusions:

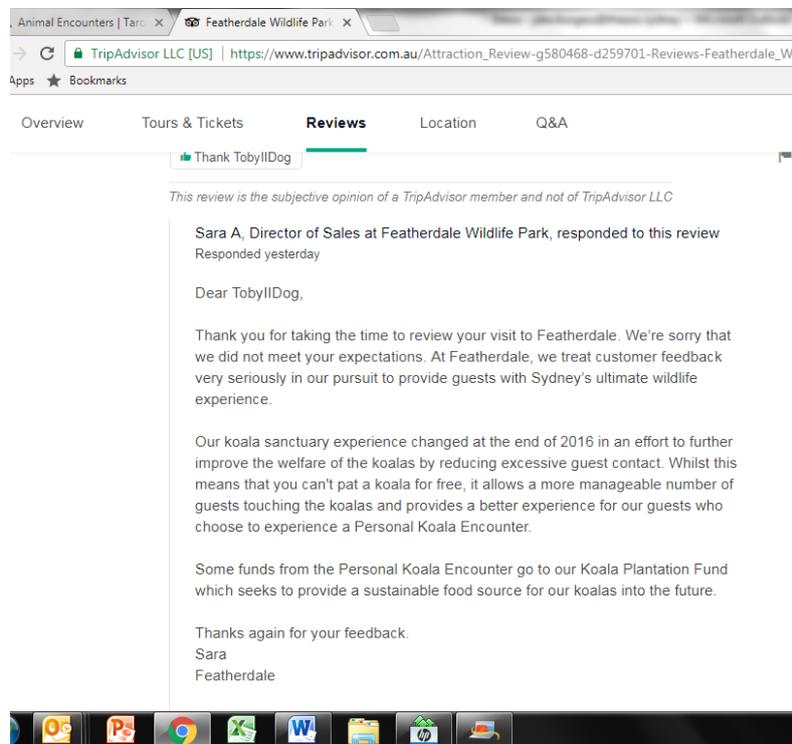
- The opportunity to meet & pet a fluffy Koala
- Talk to our Koala keepers
- Take home a souvenir photo pack

Bookings:

No bookings required! Simply visit the Koala Sanctuary and follow the signs. Packages can be purchased at the Featherdale Entry with your tickets or in the Digital Photography hub.

Please note, Koala Encounters may be cancelled at any time due to the health and welfare needs of the animals, in extreme weather conditions or at the discretion of Featherdale's animal care and photography staff.

*A portion of these funds will go towards Featherdale's Koala PlantationFund, to assist in providing a sustainable source of food for our Koalas.



Koala interactions are currently offered by Featherdale, Koala Park Sanctuary, Taronga Zoo and Wildlife Sydney Zoo in the Sydney area and also by other facilities in NSW including:

1. Australian Reptile Park
2. Potoroo Palace,
3. Billabong Koala and Wildlife Park,
4. Shoalhaven Zoo
5. Australian Walkabout Wildlife Sanctuary and
6. Mogo Zoo

Sydney Zoo has undertaken an assessment of the koala encounters offered in the Sydney area and provides this summary for the PAC's information below.

	Featherdale	Koala Park Sanctuary	Taronga Zoo	WILDLIFE Sydney Zoo
Location	Doonside	West Pennant Hills	Mosman	Darling Harbour
Cost (above admission)	\$20.00 each	\$0 – included in admission price	\$24.95 total for up to 4 people	\$20 for 1, sliding scale up to \$40 for 5 \$5 ea extra person
Duration	Approx. 5-10 mins	5 mins	5 mins	10 minutes
Touching	Yes (Touch around the lower body)	Yes	No	No
Other	Keeper talk	Keeper talk	Keeper talk	Keeper Talk
Photo	Take home a souvenir photo pack	No Photo (Self taken)	Single Photo	Photo - 6 x 8
Bookings	Not required	Not required	Required - book on the day	Not required
Other Koala interactions	Breakfast with koalas	Nil	Nil	Breakfast with koalas

The product offerings are similar across the various facilities. With the recent inclusion of a separate pricing structure at Featherdale, the only facility which now offers Koala interaction as part of its admission price is the Koala Sanctuary in West Pennant Hills. Both Koala Sanctuary and Featherdale offer touching of Koalas, but the other Sydney facilities avoid this feature due to concerns about animal welfare.

While the interactive experiences offered by various facilities are substantially similar the marketing pitch differs widely, for example:

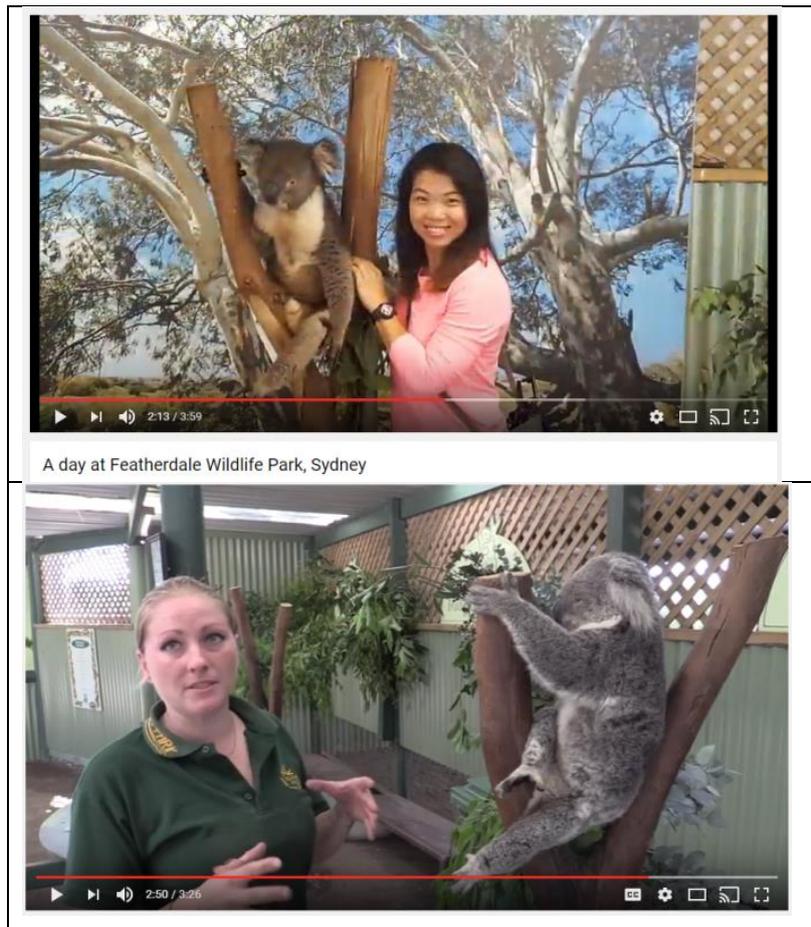
1. Featherdale sells itself as offering proximity to the animals, currently marketed under the by – line “Sydney’s Hands-on Wildlife Experience”.
2. Taronga is a government owned not-for –profit organisation that has a broader product offering and positions itself as a conservation institution with the by-line “Securing a shared future for wildlife and people”.
3. WILDLIFE Sydney Zoo has no specific by-line, but positions itself implicitly through “Takes you on an adventure in the heart of the city”. It is therefore positioning itself as convenient and also part of a broader group of attractions through the Merlin network.



This divergence in branding has allowed Featherdale to establish a reputation as the pre-eminent facility for animal interactions, despite essentially offering substantively similar products to other zoos and wildlife parks.

Sydney Zoo has not yet developed our market positioning. However, as a full service, broad appeal facility our positioning will similarly focus more broadly, thereby allowing Featherdale to continue to occupy the niche of “getting close to the animals”.

Featherdale operates its interactive Koala exhibit as a separate area within the park. It includes dedicated presentation platforms for its Koala encounters. These comprise specially built trees and photographic backdrops outside the animals’ enclosure, as shown in the photos below:



Sydney Zoo’s proposed Koala exhibit will be subject to final approval by the Animal Welfare Unit of the NSW DPI. We have considered the PAC’s desire that there be some material differentiation between the Sydney Zoo koala exhibit and Featherdale’s Koala offering.

Sydney Zoo therefore proposes that under our operating plan, for a period of three years, Sydney Zoo is limited to offering koala interactions¹ that align with the product offerings at Taronga Zoo and WILDLIFE Sydney Zoo (i.e. no touching), as an integral part of the proposed main koala exhibit, with the exception of interactions:

1. conducted in the Educational Amphitheatre; or
2. provided in the context of education of school groups.

Sydney Zoo has previously provided journal articles to DP&E addressing the importance of animal interactions as part of enhancing educational programs. We therefore view continuing a limited offering of koala interactions as part of our educational offering as an important element of our educational programs. We attach the relevant article for the information of the PAC in **Attachment 1**.

We thank the PAC for the opportunity to resolve these matters. Should there be any further questions we remain available to respond.

Sincerely



Jake Burgess - Managing Director

¹ As defined in the draft Australian Animal Welfare Standards and Guidelines Exhibited Animals – General. i.e **Interactive program:** activities supervised by one or more keepers which encourage a member of the public to touch, feed and/or have close contact with an animal, either inside or outside the animal's normal enclosure. It is not considered to be an interactive program when members of the public enter a designated walk-through animal enclosure such as a macropod walk-through or a walk-through aviary.