



Sydney2030/Green/Global/Connected

CITY OF SYDNEY  

Tourism Action Plan

Draft: July 2013

city of villages



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The Tourism Action Plan can be accessed on the City of Sydney website at **www.cityofsydney.nsw.gov.au**.

Have your say: We want to know what you think of the Tourism Action Plan.

Submissions should be marked 'Tourism Action Plan' and can be emailed to **strategy@cityofsydney.nsw.gov.au** or posted to:

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01

Executive summary

Value of tourism

Sydney is Australia's premier destination city and the gateway to New South Wales (NSW), attracting 10.5 million visitors in 2012 with 4.3 million visitors staying directly in the City of Sydney's local government area (LGA)¹. It is recognised as Australia's premier destination city for good reason, with its beautiful natural harbour, iconic architectural landmarks, and world renowned events and attractions. The wide range of reasons to visit means Sydney currently receives approximately 50 per cent of all international visitors to Australia, exemplifying Sydney's status as the nation's only global city.

The tourism sector makes a significant impact on Sydney's economy, benefiting the city's businesses and communities. Visitor direct expenditure contributed over \$5 billion to the City economy in 2012². By its very nature tourism is a broad sector, supporting diverse industries such as transport, accommodation, education, retail, cultural and recreational services³. The city's vibrant 24/7 tourism industry underpins the health and vitality of more than 10,000 businesses in the city and provides important employment opportunities. More than 6.8 per cent of the LGA workforce is employed in the city's tourism industry, an estimated 26,700 people⁴.

Tourism is therefore a priority area of focus for the City of Sydney (the City) due to its important contribution to:

- Job creation, economic growth and resilience – tourism is one industry that continued to provide jobs and bring much needed economic stimulus through financially difficult times⁵.

The tourism sector is a priority area of focus for the City of Sydney due to its important contribution to job creation and economic growth, and increased knowledge and cultural awareness between countries.

- Increased knowledge and cultural awareness between countries – tourism helps to distribute information about our country's history, civilisation, traditions and customs to international visitors; and
- National and international recognition of Sydney as a great place to visit, live, work, invest, study and stage events – tourism benefits the wider community by enriching the diversity and cultural vitality of the city and improving lifestyles.



Challenges and opportunities

Despite the success that Sydney has had to date as Australia's premier destination city, it must move forward to secure its place on the world map as a destination for leisure, business, employment and education. The City of Sydney recognises that the tourism sector in Sydney is facing a number of challenges globally, nationally and locally.

Global and national challenges include: Australians choosing to travel internationally instead of domestically; the historically high value of the Australian dollar; the dampening effects of the global economic downturn reducing business and leisure trips; and the increased competition of new tourist markets in the Asia-Pacific region.

Local issues are many and varied, and include: a recognised shortage in hotel accommodation in the city, with different industry forecasts showing that between 5,000 to 9,000 additional hotel rooms are required in the next decade to meet the demand of growing tourist numbers in Sydney⁶; the need to cater to growing demand for 'green' tourism and eco-tourism, and to meet sustainability targets within the sector; the need to deliver new and unique experiences to attract first-time and return visitors; and the need to promote safety and a vibrant night time economy balancing the needs of visitors, businesses and local residents.

Though challenges exist, the City has also identified numerous opportunities for developing tourism in Sydney. When realised, these opportunities will further reinforce Sydney's position as Australia's premier tourist destination. Existing opportunities include: marketing Sydney to new and emerging markets such as China, Korea and India; the redevelopment of the Sydney International Convention, Exhibition and Entertainment Precinct (SICEEP) that will reinforce Sydney's position as a premier conference and convention destination; further expanding Sydney's diverse events, attractions and experiences so that they continue to rank amongst the best in the world; and meeting the growing demand for greener accommodation and high quality tourism facilities and infrastructure which will provide further prospects for economic growth.

Without proactive, collaborative effort by partners to address all major challenges facing Sydney's tourism sector, the opportunities that have been recognised for growth will not be realised. Through this Tourism Action Plan, the City sets out how it will work with partners to maintain and develop a vibrant tourism sector in Sydney.

Tourism makes a significant economic impact with visitors delivering a direct spend of more than \$5 billion into the city economy in 2012.



Our focus for action

The City has an important role to play in developing a strong visitor economy. We will work with industry and government partners to create an environment that allows tourism to diversify, grow and develop.

The City will focus its activities in three core areas:

Destination development – encouraging the development of product and infrastructure;

Destination management – enhancing the quality of the visitor experience; and

Destination marketing – strengthening partnerships to maximise visitation potential.

Some of the key projects we intend to undertake to grow, diversify and sustain the tourism sector include:

- Working in partnership with the NSW Government to improve key areas of Sydney – transform George Street to include light rail, pedestrianisation, wider footpaths, outdoor dining and open public space – and to increase options for public transport and cycling;
- Collaborating with Business Events Sydney to attract a greater number of conferences and business events to Sydney, increasing the number of business-related visits to the city;
- Alongside Destination NSW, working to promote Sydney as a destination of choice in both domestic and international markets, through local and internationally focused marketing campaigns;

- Continuing to support major festivals and events that increase visitation to Sydney, such as the Sydney Festival, Sydney Mardi Gras, the Biennale of Sydney and the Sydney Writers' Festival; produce world-class events such as the Sydney Chinese New Year Festival, Sydney New Year's Eve and Art and About, and also work to secure first-run premieres of musicals;
- Working with Destination NSW, Sydney Airports, the Sydney Harbour Foreshore Authority and Transport for NSW to improve the quality and consistency of information provided to tourists at key arrival points and information kiosks; and
- Continuing to introduce initiatives that respond to safety of visitors and residents in the City at night by diversifying the Late Night Economy.

02

Introduction

This Tourism Action Plan sets out how the City of Sydney will work with partners to maintain and develop a vibrant tourism sector in Sydney.

Background

During 2007–08, the City undertook the most comprehensive community consultation in its history. We spoke to residents, workers, students, business operators, industry associations, community organisations and visitors about their vision, goals and aspiration for the future of the city. The result is *Sustainable Sydney 2030* – a comprehensive plan for the development of the city to 2030 and beyond. The plan sets out a series of actions to achieve a green, global and connected city and identifies synergies between focus areas, such as the linkage between community, liveability, creativity, innovation and productivity outcomes.

The City of Sydney draft Economic Development Strategy 2013 has built on and updated the broad economic themes in *Sustainable Sydney 2030*. It provides a comprehensive framework which guides the City's economic development initiatives. It sets out the City's economic development aspirations, role, priorities and approach.

The Economic Development Strategy is intended to be read in conjunction with the detailed action plans prepared for priority industry sectors, new and emerging sectors, and the development of places, one of which is this Tourism Action Plan.

Tourism Action Plan

Tourism has been identified as a priority within the City's Economic Development Strategy. The size of the tourism sector relative to other industries, the number and diversity of jobs associated with the tourism industry and the role tourism plays as a catalyst for economic investment in NSW and Australia through international visitation support this priority status.

There are many challenges facing the sector. They include increased competition over Sydney as a destination of choice for tourists and business travellers within the Asia-Pacific region and high hotel occupancy levels which limit the capacity for growth and the attraction of conferences and events. In recent years, the Australian tourism market has experienced declines in domestic and international tourist numbers due to the high value of the Australian dollar relative to other global currencies⁷.

The focus of the City's actions will be directed to the maintenance and growth of tourism-related industry in the city to ensure Sydney remains a highly desirable destination for the global tourist travel and business markets. The economic contribution of tourism-related businesses to the city is significant, as is their contribution more generally to the liveability of Sydney for residents, workers and visitors and the cross-cultural promotion of Australia as a destination for trade and tourism.

Many of the initiatives set out in this plan focus on enhancing the quality of the experience of visitors to Sydney, strengthening partnerships to maximise visitor numbers and encouraging the development of tourism products and infrastructure, and the marketing of Sydney to a wider audience of potential visitors.



Evidence-based

This plan responds to the findings of a research and consultation program conducted during 2011 and 2012.

This program captured the views of the tourism industry and government stakeholders and reflected the views of the community expressed during the extensive consultation process undertaken during the development of *Sustainable Sydney 2030*. Sydney's tourism sector was compared with that of other global and Australian cities, major trends and issues affecting the sector were identified and baselines established for many of the indicators that will be used to monitor change over time. Pertinent findings from key Tourism Australia and Destination NSW reports on the tourism sector have also been addressed.

A dynamic plan

This action plan is intended as a dynamic plan, changing as the needs and priorities of the sector change.

Progress on the identified projects will be reported regularly.

Progress toward the achievement of targets or the identification of trends will be reported annually, albeit some data will not be refreshed this frequently.

Priorities will be assessed annually based on the outcomes achieved and as new information on the needs of the sector become available.

A major review will be undertaken to coincide with the end of the first five years of the action plan.

A partnership approach

In delivering on this action plan, the City cannot act alone and seeks to create strong partnerships and networks with industry, government and others, so, through our combined efforts, more can be achieved.

We recognise the excellent work that our partners are taking forward within the tourism sector in Sydney, and will look to support them in developing this crucial part of the city's economy. For instance, NSW Government's recently released Visitor Economy Taskforce Report looks to put in place a wide range of actions intended to double overnight expenditure in the State by 2020. The City will, wherever possible, align its actions with those of partners to achieve this goal.

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Tourism in Sydney

Defining tourism

The World Tourism Organisation defines tourists as people “travelling to and staying in places outside their usual environment for not more than one consecutive year for leisure, business and other purposes”. A person’s usual environment refers to where they would normally carry out everyday activities, such as the area where they live, work and shop⁸.

Over the past century, tourism has experienced continued growth and greater diversification to become one of the fastest-growing economic sectors in the world. These dynamics have turned tourism into a key driver for socio-economic progress. In recent years, the global business volume of tourism has equalled or even surpassed that of oil exports, food products or automobiles⁸.

Tourism can contribute significantly to the wealth of cities through the creation of employment opportunities in industries associated with tourism and leisure, the income generated through the consumption of goods and services by tourists and taxation revenue from tourism related businesses.

Tourism demand consists of travel and visitation by Australians domestically and overseas visitors. This visitation can be for leisure, business, employment or education.

Inputs to tourism supply include all of the inter-related activities that are required to produce goods and services for consumption by tourists. This includes transport, accommodation, education, retailing, cultural and recreational services⁹.

Tourism is one of the fastest growing economic sectors in the world, and contributes significantly to economic growth and diversification through the creation of a wide range of employment opportunities.

Tourism also leads to increased knowledge and cultural awareness between countries, and distributes information about a particular country’s history, civilisation, traditions and customs. Tourism is a major contributor to national and international recognition of Sydney as a great place to visit, live, work, invest, study and stage events. It delivers an impact across the wider community by enriching the diversity and cultural vitality of the city, and improving lifestyles.

In 1994, the United Nations developed three classifications for types of tourism:

- Domestic tourism – involving residents of the given country travelling only within this country;
- Inbound tourism – involving non-residents travelling in the given country; and
- Outbound tourism – involving residents travelling in another country¹⁰.

This action plan is concerned with all three tourism classifications.



Economic contribution

National and NSW

Tourism is a significant industry for Australia. In 2011–12, it generated \$106.6 billion in consumer spending and contributed over \$41 billion to Australia's gross domestic product¹¹. Tourism directly employs over 500,000 people and earns nearly 10 per cent of our total export earnings, making it Australia's largest service export industry (2011–12 figures)¹².

Visitors now spend more than \$30 billion in NSW per annum¹³. Tourism generates \$83.6 million a day for the State and approximately \$36 million a day for metropolitan Sydney¹⁴. As an industry in NSW, it is greater than agriculture, forestry and fishing, supporting a multitude of businesses from shops, cafés and hotels through to petrol stations, laundries and market gardeners¹⁵.

Based on market trends developed by the Tourism Forecasting Committee, international visitor arrivals to Australia are predicted to reach 8.4 million by the year 2022, which is a significant increase on 2012 numbers which were forecast at 6.0 million visitors¹⁶.

Metropolitan Sydney

For the year ended December 2012, Metropolitan Sydney attracted 10.5 million visitors, staying a total of 78.9 million visitor nights and contributing \$11 billion dollars directly into the economy¹⁷.

Domestic day trips are also extremely important for the Sydney economy. In the year to December 2012, Sydney received 20.3 million domestic daytrip visitors – up 7.0 per cent on the previous year¹⁸. These visitors spent \$2.3 billion in Sydney¹⁹.

Around 47 per cent of all international visitors and 46 per cent of international business visitors to Australia come to Sydney²⁰. In 2011–12, Sydney accommodated over 2.5 million domestic and international business visitors²¹.

The Tourism Forecasting Committee predicts Sydney will host nearly 105 million visitor nights in 2020–21²². Because visitors spend their money on a variety of activities – accommodation, transport, shopping, restaurants and attractions – the impact of this growth in visitor nights will flow to a wide range of businesses across metropolitan Sydney.

Cruise ship arrivals continues to be one of the fastest growing components of the tourism industry, and 2012–13 was the busiest on record with 265 cruise ships visiting Sydney Harbour²³. The combined passenger spend, crew spend and vessel-related costs in 2010–11 contributed \$350 million to the NSW economy and is forecasted to increase to \$1.1 billion in 2019–20²⁴.



City of Sydney local government area

The City of Sydney local government area (LGA) share of Sydney's hotel visitor arrivals in the year to December 2012 was 4.25 million (or 63 per cent of Sydney's arrivals)²⁵. These visitors delivered a direct spend into the LGA of over \$5 billion per annum²⁶. Of this total, \$1 billion was spent on shopping and \$2.8 billion in the hospitality sector, excluding prepaid accommodation²⁷.

The LGA is home to 60 per cent of metropolitan Sydney's hotel rooms²⁸. On any one night there are around 27,500 visitors staying in the LGA and annual guest nights are just over 10 million²⁹. The average hotel occupancy rate over the 12 months to December 2012 was 84.6 per cent.³⁰

On any given day, the city also attracts 480,000 day visitors and students³¹. The combined shopping spend of international and domestic visitors to the LGA is estimated to make up around 20–25 per cent of the city's retail turnover³².

Business Events Sydney, the official body responsible for promoting Sydney as a business events destination, secured 103 events in 2011–12 and was expected to attract over 58,000 delegates and contribute \$225.6 million to the NSW economy³³. The majority of these events were held in the Sydney LGA, mainly in the Sydney Convention and Exhibition Centre.

For the City's local government area, the vibrant 24/7 tourism industry underpins the health and vitality of more than 10,000 businesses.

Using the model developed for the Tourism and Transport Forum and looking at the most recent data from 2011 Census, the City of Sydney's LGA is estimated to have a total of 26,700 people directly employed as a consequence of tourism and a further 20,320 people in indirect employment, making a total of 47,020 people employed in the city's tourism industry, or around 11.0 per cent of the LGA workforce.

Tourism jobs in the LGA make up around half of the tourism-related jobs in metropolitan Sydney, and 15 per cent of tourism related jobs in the state. Metropolitan Sydney has a greater proportion of tourism employment in its workforce than any other Australian city, reflecting its predominant gateway role³⁴.

Tourism is a major contributor to national and international recognition of Sydney as a great place to visit, live, work, invest, study and stage events.

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Contemporary challenges

Conditions both locally and internationally present a range of unique challenges to the tourism sector in Sydney. This Action Plan recognises these challenges sets out how the City of Sydney will work with partners to maintain and develop a vibrant tourism sector in Sydney.

Global and national economic conditions

Over the past decade Australia has shifted from a net exporter of tourism to a net importer. Now the nation imports more tourism related goods and services than it exports. This shift was most pronounced at the peak of the global financial crisis in 2008 and has continued since. According to the latest Tourism Satellite Account published by the Australian Bureau of Statistics, in 2011–12 tourism exports (international tourism consumption in Australia) increased by 2.1 per cent to nearly \$26 billion, whereas tourism imports (tourism consumption by Australian residents on outbound trips) increased by 5.1 per cent to almost \$32 billion, creating a deficit of \$6.7 billion³⁵. Since 2002–03 the annual expenditure of outbound tourism from Australia has more than doubled, while inbound tourism has grown by less than 30 per cent³⁶. This trend is expected to continue over the next decade³⁷.

There are a number of factors which will impact this shift. In the past decade, the number of international tourism arrivals to Australia has grown. However, Australia's share of global tourism has nominally declined from 0.7 per cent (2000) to 0.6 per cent (2011)³⁸. As at December 2012, NSW's share of international arrivals to Australia was 51 per cent in 2011. Travel decisions are impacted by a complex and interrelated set of variables, which differ by market, travel type and age. Some of the factors that have impacted on the Australian tourism market include:

- Rises in oil prices have increased the cost of flights to Australia to foreign travellers;
- The global financial crisis led to fewer leisure and business trips;
- The historically high value of the Australian dollar which has acted as a deterrent to potential travellers, particularly from Europe, Britain and the US; and
- The opening up of new tourist markets in the Asia-Pacific region³⁹.

Over the long term, Tourism Australia predicts that income growth, rather than exchange rates, will have the greatest impact on tourism. This is likely to mean countries which recover quickly from the global economic downturn and those that have an emerging middle class, with growing incomes, such as China and India, will provide the greatest growth in inbound tourists to Australia. The Tourism Forecasting Committee (TFC) expects inbound tourism to Australia from China to increase at an annual compound growth rate of 6.4 per cent to 1,085,000 visitors between 2011–12 and 2021–22⁴⁰. High rates of growth in visitor arrivals are also expected to come from India with an annual average growth rate of 7.2 per cent and from Indonesia (5.5 per cent)⁴¹.

On the domestic front across Australia there has also been a tendency for decline. Since 2000, both intrastate travel and interstate travel to NSW have declined⁴². Over the same period, however, outbound tourism has almost doubled. This has significant implications from the Australian tourism market which generates 75 per cent of its income from domestic travel⁴³.

The strong Australian dollar and attractive airfares have been factors in making overseas travel more affordable for many people who might otherwise have travelled within Australia. International marketing campaigns, targeting Australian travel to destinations such as Canada, Japan and the US, for example, have also sought to exploit the high Australian dollar and stimulate tourism activities in their countries which are suffering from the impacts of the global economic downturn.



Local conditions in Sydney

Sydney has strong brand awareness and an established reputation as a 'must-visit' destination amongst the world's travellers. The attraction of Sydney is such that the city features extensively within many international travel industry awards list. For instance, Sydney was voted the World's Favourite Overseas City in the 15th Annual Conde Nast Traveller, UK Reader's Choice Awards. This award comes in a long list of international honours Sydney has collected recently, including top Australasian city for the 17th time in the recent Travel+Leisure Awards; number one city in the Condé Nast Traveller USA Readers' Choice Awards; Lonely Planet's World Best Summer City award; and one of the World's Best Festival and Major Events City by the International Festival and Events Association.

While the value of inbound tourism to Australia overall has declined over the last decade, Sydney has continued to see growth in tourism demand since the Sydney Olympics in 2000. In 2001–02 the city hosted 63.98 million visitor nights (domestic and international, including students)⁴⁴. By 2011–12, this had grown to 77.58 million visitor nights and is anticipated to grow by 35.3 per cent to 104.95 million visitor nights in 2020–21⁴⁵.

Demand for accommodation in central Sydney has risen significantly since 2000. Between December 2000 and December 2012, the number of visitor arrivals has increased 37%, and the number of visitor nights has increased 15.9%. However, tourism accommodation supply has decreased 3.9% in this period, which has resulted in an occupancy rate of 85.4 per cent for the year to December 2012 – one of the highest on record for the city, and in Australia⁴⁶. The city has benefitted from increased global connectivity particularly with visitors from East Asia – China, Indonesia and South Korea. Visitor arrival numbers have increased by more than a third since 2000, with an extra 1.5 million visitor nights per year.

There has been significant growth in international student nights, which have more than doubled over the past decade from 8.5 million in 2000 to 19.5 million in 2010. International student enrolment in higher education, vocational and English language sectors have experienced strong growth since 2004. This growth looks set to continue in the coming years with increased numbers of students from India and Asia.

In terms of International Congress and Convention Association's overall rankings for the number of congresses and conventions hosted, Sydney has slipped from its global rank of 10 in 2010 to 34 in 2011⁴⁷ but climbed again to 24 in 2012. Similarly in the Asia and Middle East region, Sydney's rank has slipped from 2 in 2010 to 10 in 2011⁴⁸. In 2011, Melbourne surpassed Sydney with its global ranking of 31 and Asia Pacific and Middle East ranking of 9⁴⁹.



Sydney remains Australia's top city for business events, but its share of large international events within the Asia-Pacific region has declined⁵⁰. Singapore, possibly Sydney's biggest competitor, now offers four major convention centres, several of which feature casino components. Beijing and Seoul have invested heavily in conference infrastructure and Auckland has just announced plans for a 3,500-seat convention centre to attract large international business events. In recent years Melbourne has also significantly expanded its convention and conference facilities with a view to securing a greater market share of events. The redevelopment of Star City (The Star) with a 4,000-seat multipurpose venue and the construction of The Sydney International Convention, Exhibition and Entertainment Precinct (SICEEP) capable of hosting up to 12,000 delegates, will work to reinforce Sydney's position as a premier conference and convention destination.

Sydney is expected to benefit from growth within the cruise ship industry. The cruise sector now attracts 20 million travellers worldwide, with more ships being built to meet strong global demand⁵¹. In the 2012–13 cruise ship season, 265 cruise ships visited Sydney Harbour compared with 214 cruise ships in 2011–12 (23 per cent increase). Growth in cruise ship visitations have grown significantly at 76 per cent in the past two years – in 2010–11, 150 cruise ships visited⁵². Carnival Australia, the country's largest operator of travel cruise boats, expects the local cruise industry will carry one million passengers by the year 2020⁵³.

Growing numbers of interstate and international visitors will continue to create a demand for tourist accommodation in the City of Sydney, especially due to the ongoing growth the cruise ship industry and the increased importance of major business events.

05

Focus and outcomes

Role of the City

The role of the City is to work with industry and government partners to create an investment climate that allows tourism, including eco-tourism and environmentally sensitive tourism, to diversify, grow and develop.

Tourism helps strengthen local economies, creates jobs and delivers broader benefits to the community by facilitating the growth of a wider range of amenities, cafes, restaurants, attractions and shops that would not be possible from local support alone⁵⁴. Tourism also supports a range of jobs, both full time and part time, particularly for those traditionally disadvantaged, such as women, youth, unskilled workers and Aboriginal and Torres Strait Islander peoples. Tourism is one of the few industries that continued to provide jobs and bring much-needed economic stimulus through financially difficult times⁵⁵.

Tourism is an important medium for education, social and cultural exchange. Visitor spending also helps support public buildings, parks and gardens, libraries and cultural infrastructure. There are also intangible benefits that tourism can bring to a local community. Residents often have more pride in their area if it is a place where others wish to visit and explore. In many ways, tourism can revitalise local areas, improve property prices and stimulate business⁵⁶.

In identifying issues of concern to the tourism sector and the actions to mitigate their effect, this action plan has a focus on projects that are within the control of the City.

Where issues of concern are identified but are not within the City's direct control, the City will advocate for change and where appropriate, support the lead agency or organisation.

One of the desired outcomes of this action plan is a tourism sector in Sydney that offers a range of events, attractions and experiences ranking amongst the best in the world and are unique to Sydney and Australia.

There are, of course, a range of issues not featured as central tourist issues within this action plan, but which are of great concern to Australia's wider tourism sector – for instance, immigration and visa processing issues. While the relevant actions are of concern to the City, they are not within our direct control and are therefore not addressed in this action plan.

As set out in the draft City of Sydney Economic Development Strategy, the focus of projects to be delivered by the City across all of the industry Action Plans are outlined in three strategic priorities:

1. **Strengthen Sydney's competitiveness:** through the creation of a city that encourages business investment, attracts visitors and has the amenity and liveliness sought after by residents and workers now and in the future;
2. **Improve productivity and capacity:** through investment in the productive and transformative and social infrastructure needed to unlock the city from congestion, to keep people and goods moving, to enable full participation in the workplace and to enable workers at all levels to live close to their work; and
3. **Promote opportunity:** building on the strong external links and cross sector networks, supporting the continued development of strong industry clusters, encouraging partnerships and collaboration and working to strengthen the entrepreneurial and small business community within the City.



Focus for action

The Tourism Action Plan sets out three areas in which the City will focus its activities. Projects grouped in these areas respond to the issues, challenges and opportunities identified by the research and consultation undertaken by the City in 2011 and 2012. The three areas of focus are:

- **Destination development** – encourage the development of product and infrastructure;
- **Destination management** – enhance the quality of the visitor experience; and
- **Destination marketing** – strengthen partnerships to maximise visitor potential.

The City's draft Economic Development Strategy identifies a number of common themes that will be addressed in each of the action plans. Projects included in this action plan will address:

- Support for entrepreneurs, new business and small business;
- Sustainability initiatives;
- Opportunities to increase Aboriginal and Torres Strait Islander peoples' enterprise development and employment in the sector;
- Knowledge and innovation; and
- Increase the support for attracting International Students, their families and visitors (workers and tourists) from Asia.

The next sections of the action plan set out in more detail the three areas of focus and the major projects to be delivered. More detail on all the projects can be found in Appendix 1, which provides a full breakdown of actions and also provides detail regarding partnership working and timeframe.

Outcomes

A desired outcome from this action plan is the recognition of Sydney as Australia's premier tourist destination ahead of other Australian capital cities and as a regional leader in Asia Pacific.

Another desired outcome is a tourism sector that offers a range of diverse events, attractions and experiences that rank amongst the best in the world and are unique to Sydney and Australia, as well as a sector that leverages opportunities and markets itself to new and emerging markets such as China and India.

High-quality tourism facilities, greener accommodation and transport infrastructure that supports and sustains growing numbers of domestic and international tourists, will also be increasingly sought.

06

Destination development

Why we need to act

In terms of capacity to support the tourism sector, Sydney currently has a hotel occupancy rate of 85.4 per cent and over the past decade fewer than five new large hotels have opened⁵⁷. In fact, since the Sydney Olympics, there has been an overall decline in the number of hotel rooms available in the city, despite significantly greater numbers of visitor nights. Many older hotels such as the Chevron, Sebel Townhouse and Rex have been withdrawn from the hotel market and converted to high-end residential apartments. New hotels have not been built due to competing demands for land and the large capital investment required constructing them. There is a particular shortage in the 3–3.5 star range as well as in the diversity of product on offer in terms of boutique accommodation⁵⁸. Different industry forecasts estimate that somewhere between 5,000 and 9,000 additional hotel rooms are required in the next decade to meet the demand of growing tourist numbers in Sydney⁵⁹.

Sydney has long-standing and successful tourism products like the Sydney Opera House, Sydney Harbour Bridge and Bridge Climb, Taronga Zoo, Sydney Aquarium and Wildlife Sydney, harbour cruises and the Sydney Tower, but to remain competitive, it needs to invest in new products to target new markets and offer a new experience to return visitors.

Globally, cities have had to continually invest in established tourist precincts to ensure they remain desirable and competitive and create new ones when redevelopment opportunities occur. It is critical to encourage the rejuvenation of a city's obsolescent buildings/areas in key destination precincts by stimulating market dynamics and supporting a regularly maintained public infrastructure and refurbishment/renewal works program.

The City of Sydney will aim to develop strong Village precincts that offer unique tourism experiences outside of the city centre.

In London, this has resulted in the development of the South Bank arts precinct; in Melbourne, the result has been Federation Square and in New York, Times Square has undergone significant redesign to become more pedestrian friendly. Sydney has some highly successful tourist areas such as The Rocks, Circular Quay, the Royal Botanic Gardens, Pitt Street Mall, Chinatown and Darling Harbour. The success of these areas will be measured on their capacity to remain desirable destinations and therefore new and ongoing investment will be required. The redevelopment of Barangaroo and the Sydney International Convention, Exhibition and Entertainment Precinct (SICEEP) offer Sydney a unique opportunity to create experiences and attractions which appeal to the business and leisure tourist market. The Village precincts outside the centre of Sydney also have a significant role to play, with each uniquely different and possessing the ability to attract tourists with diverse cultural, retail and business offerings.

Sydney's appeal as a destination for large-scale conferences and conventions is determined by its capacity to offer world-class facilities and infrastructure which can accommodate large groups and service the needs of conference producers in relation to communications, technology and catering. The construction of SICEEP is therefore crucial in reinforcing Sydney's position as a premier conference and convention destination. Other Australian cities, such as Melbourne, have recently invested significantly in improvements to their conference facilities, while countries such as Singapore have emerged as regional leaders in the global conference market. Due to this increasing competition both national and internationally, partners must work innovatively to retain and attract a greater number of conferences and business events to Sydney.



Hotels and conference centres are critical parts of the built infrastructure that service the tourism sector and are resource intensive. Available estimates of the environmental footprint indicate over 365,000 tonnes of GHG emissions from energy used, more than 1,800 megalitres of water used and more than 85 megalitres of waste generated per annum from within the City of Sydney LGA⁶⁰. Continuing at these rates is unsustainable and if unaddressed, will have negative consequences on the environment and community in the long term.

Currently, there is also emerging demand for sustainable tourism options in the business events industry where customers are demanding improved environmental performance by tourism accommodation providers and facilities to satisfy their own corporate responsibility goals. To capture and grow this lucrative market, tourism product and service providers in the city will need to deliver greater sustainable tourism options and also capitalise on the 'green consumer' tourism market by offering accommodation options that reflect sustainable design and management.

What we will do

The City will work to develop Sydney as a destination through a wide range of interconnected actions, of which greater detail is given within Appendix 1;

Developing capacity

The City has a role to play in the development of Sydney as a tourist destination. Our focus will be on the investment in new environmentally sustainable tourist infrastructure, and improving the quality of the public domain in main tourism areas.

The City will advocate to other levels of government and the property sector to increase the levels of new hotel accommodation, particularly in the 3–4 star range, throughout the city, but particularly in the city centre and urban renewal areas.

We will also work with the NSW Government to leverage tourism opportunities from the redevelopment of the Sydney Entertainment and Convention Centre to improve the City's capacity to host large-scale concerts, conferences, exhibitions and conventions. The City will also work with partners to support the Barangaroo Development, which is expected to include a hotel, residential apartments, office building(s), cultural and civic facilities and increased transport infrastructure and services.



Developing city areas

We will work closely with other levels of government and statutory authorities to ensure that the management of key tourist precincts including the CBD, Haymarket, Rocks, Darling Harbour, the Botanic Gardens and Circular Quay is better integrated to improve the tourism experience for visitors.

We will work with local businesses and stakeholder groups to develop strong Village precincts that offer unique and authentic tourism experiences outside of the city centre. We will also work with local business partnerships and chambers of commerce to develop local tourism information, infrastructure and experiences within the City's villages.

Developing connections

We will work with Destination NSW and other agencies such as the Sydney Harbour Foreshore Authority and Sydney Ports Corporation to ensure facilities for passenger cruise ships can cope with expected increased capacity. We will also ensure inbound cruise ship passengers are provided with high-quality information about the city.

We will also work with the operators of Sydney's domestic and international airport and the NSW and Federal Governments to introduce measures which allow for increased capacity, while balancing the needs of local residents and business owners.

Developing sustainably

The City will lead by example and drive demand by reviewing its own policies and procedures including green event guidelines, accommodation and business event procurement, sponsorship and venue operating standards.

We will engage with the sector on environmental aspects and investigate the options of forming a Green Tourism Working Group and the development of a centralised website with relevant sustainability information for key industry stakeholders.

The City will investigate information barriers in the market. We will review current, sometimes confusing environmental accreditation schemes and investigate the development of performance indicators to determine options for environmental information disclosure.

Developing communities and business

The City will work with partners within the business and education sectors to increase capacity within the City's communities and businesses to better support and capitalise on the growth of the tourism sector.

We will also work to ensure development of Aboriginal and Torres Strait Islander peoples' tourism infrastructure and experiences.



Sustaining capacity and building economic growth through events management

The City will work with partners to improve the integrated management of year around business, retail, cultural and tourist events, business conferences and tailored events packages to attract international and domestic visitors. The objective is to support underlying demand for existing and new hotels resulting in higher occupancy levels as well as stimulate visitor and retail economic growth.

Developing reasons to visit

The City will work with partners to increase the number of conferences and business events held within Sydney every year. We will also continue to support high-profile events which attract tourists to Sydney and raise the City's profile internationally.

We recognise the importance of Sydney's retail offer as one driver of visits to Sydney. We will work with all our partners within the retail sector to position Sydney as Australia's premier retail destination with a shopping experience in the city centre that matches those found in comparable global cities.

Major projects

Examples of some of the major initiatives we will undertake to support destination development in Sydney include:

- The investment of \$1.5 million with Business Events Sydney to attract a greater number of conferences and business events to Sydney during 2014–16, increasing the number of business-related visits to the city;
- The transformation of George Street to include light rail, pedestrianisation, wider footpaths, outdoor dining and open public space to increase options for public transport and cycling and to improve the way visitors navigate the city centre;
- Continuing the substantial upgrade to the public domain in Chinatown already underway, including the installation of new seating, lighting, public art, footpath treatments and road design to ease congestion, improve appearance and increase perceptions of safety for visitors;
- Delivering programs such as ChinaConnect to help City businesses develop their understanding of the Chinese visitor market; and
- Through our Late Night Economy projects we will introduce new initiatives in the City's Late Night areas, such as Oxford Street, Kings Cross and George Street, to ensure they develop in a way that is environmentally and socially sustainable and seek to balance the needs of residents, workers and visitors in the long term.

Details of all the projects and programs can be found at Appendix 1.

07

Destination management

Why we need to act

Our research tells us that a number of factors impact on the experience of visiting tourists in Sydney, including: the diversity and quality of accommodation; the availability of information on tourist related experiences; ease in getting around, including signage; opening hours of tourist attractions; cleanliness of the public domain; perceptions of safety; the quality of the retail offering and the presentation of shops; the diversity and quality of restaurants, bars and entertainment venues; accessibility to public transport, transport options including bike lanes and footpaths; the range and availability of cultural institutions, festivals and events the city has to offer.

By 2030, the resident population of the city is anticipated to increase by 62,000 people, while the number of workers is set to increase by over 16 per cent⁶¹. The continued growth in the number of businesses, houses and residents within the city presents challenges in relation to managing the visitor experience and the way visitors interact in the city environment. Every week new buses are added to the Sydney network to cope with additional demand. These additional buses are currently causing bottleneck issues with traffic at locations throughout the city.

In addition, congestion on the CityRail network as a result of increased carriages, services and passenger numbers means that despite improvements to technology, trains now move slower than they did a decade ago. Wynyard and Town Hall stations are at near capacity and will be unable to cope with the long-term projected demand under the current network conditions. Unaddressed, more people and vehicles will lead to increased levels of congestion, pollution, noise and the time spent travelling from one part of the city to another.

The City of Sydney will continue to develop how we manage key areas of Sydney to ensure the city continually meets the expectations of all visitors.

Every day in the City LGA it is estimated there are more than one million walking trips made by residents, workers and visitors. In successful, pedestrian-friendly areas like Pitt Street Mall, Circular Quay and Martin Place, pedestrians can move with ease and are unencumbered by high volumes of vehicles. In main pedestrian link locations such as George Street, however, large numbers of pedestrians are crammed onto narrow footpaths and compete with trucks, buses, taxis and other vehicles as they navigate past significant tourist destinations, including Sydney Town Hall, St Andrew's Cathedral, the Queen Victoria Building and World Square.

Research undertaken as part of the Visitor Information Services Review identified that tourists visiting Sydney find it hard to orientate themselves around the city. In many cases, pedestrians move up and down George Street but are unable to make sense of the connection points to other destinations such as the Royal Botanic Gardens, Hyde Park and Darling Harbour.

The city is home to several significant late-night areas – Kings Cross, the city centre, Oxford Street, the Rocks and Darling Harbour. These zones attract both domestic and international tourists and the experience they offer tourists impacts on Sydney's global reputation. Extensive community consultation undertaken by the City during 2011 highlighted the need to better manage these spaces to increase perceptions of safety amongst tourists and the movement of people from one destination to another.

The City needs to work now to address congestion in the city and on public transport, improve linkages between key tourist locations and improve signage and orientation to assist tourists move around the city.



What we will do

The City will develop how we manage key areas of Sydney to ensure the city continually meets the expectations of visitors. We will do this through a wide range of interconnected actions, of which greater detail is given within Appendix 1.

Managing city environment

The City plays a key role in maintaining the standard and quality of the city streets and public areas through ongoing maintenance and upgrade programs, cleansing services and beautification through floral displays. We will continue to deliver these important services that contribute to the overall experience of visitors to Sydney.

The City has a role to play in the management of the city's public domain and ensuring increased community safety and perceptions of safety, particularly at night.

We will work to increase CCTV coverage and work with the NSW police to ensure visitor safety, and also we will put in place a range of mechanisms to manage the movement of visitors and residents throughout the city.

Managing visitor navigation

Through our design program, we will seek to improve the quality and functionality of key meeting points and destinations for tourists in the city, such as Chinatown, Taylor Square and Pitt Street Mall, as well as ensure that they better cater for various groups like families and people from different cultural backgrounds.

In order to improve amenity, we will invest in high quality urban design initiatives – for example, better lighting, signage and landscaping.

The City will also seek to improve the movement of people on city footpaths. We will invest in high-quality signage and way-finding projects throughout the city to help visitors find their way and provide any information needed about a particular location. We will also undertake public domain improvements to better meet the needs of pedestrians, particularly those who are frail, aged or living with a disability.

Managing visitor arrivals

We will improve the quality and scope of tourist services for cruise ship passengers and improve the availability and range of information for visitors arriving at Sydney International Airport.

Managing visitor transport

We will support the NSW Government in delivering an increased range of transport options throughout Sydney including the introduction of light rail in the city, down the George Street spine, around Barangaroo and beyond to help to ease congestion at important stations in the network such as Wynyard, Martin Place, Town Hall and Central Station and integrate major transport and activity hubs. We will also continue to work with the NSW Government on the pedestrianisation of a substantial portion of George Street.

Managing visitor feedback

We will work with partners to monitor the level of tourist satisfaction in the LGA and ensure that this feedback is incorporated into City of Sydney decisions regarding the tourism sector.



Major projects

Major initiatives to support the management of tourist destinations in Sydney include:

- Enhancing our *visitor information services* to deliver strategically located visitor information centres and kiosks, a roving ambassador program and quality information helping tourists maximise their stay;
- Working with the NSW Government to address bus congestion at major train stations in the city;
- Work with the NSW Government to introduce light rail into the city centre and pedestrian-friendly measures for a significant portion of George Street;

–Introducing a *way-finding and signage code* to deliver clear and consistent information to direct people to popular destinations based on the innovative and effective ‘Legible London’ project; and

–Monitoring the level of *tourist satisfaction* in the LGA through surveys which will include visitor impressions of the city and its villages, visitor servicing, signage, attractions and the likelihood of a return visit.

Details of all the projects and programs can be found in Appendix 1.

08

Destination marketing

Why we need to act

Sydney is competing in a global marketplace for increasingly discerning tourists. The factors that lead a tourist to choose one location over another are often complex and influenced by how attractive the destination is, the friendliness of its people, interesting and diverse cultures, ease of access, weather, exchange rates and cost – as well as their own levels of disposable income. One of the most significant factors for any destination, however, are the attractions and experiences which draw people there. Paris has the Eiffel tower, Notre Dame and the Louvre; Hong Kong has night markets, shopping and exotic foods; Melbourne has street art, active laneways and high-quality public art. Sydney benefits from its unique physical environment; a beautiful harbour, beaches and reserves and iconic buildings and infrastructure such as the Sydney Opera House and Sydney Harbour Bridge. It is largely this physical environment offering that has historically drawn tourists to Sydney.

Sydney already has a unique range of tourist products aimed at different types of tourists including cruises on Sydney Harbour, the opportunity to experience indigenous flora and fauna and the Bridge Climb. Sydney also hosts world-class cultural events and festivals, including the internationally renowned Sydney New Year's Eve fireworks; the largest Chinese New Year celebration outside China; the Sydney Festival; Sydney Writers' Festival; Sydney Film Festival; Sydney Mardi Gras; Sydney Fringe Festival; the Biennale of Sydney and Art and About.

The City of Sydney will ensure that Sydney is able to capitalise on new and emerging travel markets such as those developing in China and India.

Sydney is competing for tourists on a number of fronts. In relation to domestic tourists who might be travelling to Sydney for leisure, they are seeking an experience, event or attraction. For first-time visitors, the appeal of Sydney might rest on those traditionally marketed images and experiences. For return visitors, this experience will need to be a combination of the things they know and love about the city, combined with new or unique reasons to visit. This might be a new show, exhibition, shopping experience, hotel, sporting event or other attraction. In relation to people travelling domestically, Sydney is competing with other Australian capital cities such as Melbourne, Brisbane and Adelaide.

Changes in exchange rates, the high cost of travel within Australia and rapid developments within the tourism offering of other countries within the Asia-Pacific region have meant Australia is now increasingly competing with places such as New Zealand, Indonesia, Thailand, Bali and parts of China for international tourists. If people can get what they think is a comparable product, for a cheaper rate and with greater ease and travel time, they will. Sydney risks losing international traveller visitation as people seek a cheaper option, closer to home.

To draw new domestic and international tourists and return visitors, Sydney needs to maintain the experiences for which the city is renowned, and also create new ones which position the city ahead of the competition in terms of unique experiences. Sydney must also capitalise on new and emerging travel markets such as those developing in China and India as a result of the new middle class.



What we will do

The City will work with key partners to market Sydney through a wide range of measures locally, nationally and internationally, of which greater detail is given within Appendix 1.

Marketing to visitors in the city

We will provide a variety of tourism material at information points across the LGA which promote a range of tourism experiences, including new and emerging activities. We will also invest in new technology, such as smartphone applications, to assist tourists to access information about the city, the experiences on offer and how to get there.

We will work with Destination NSW and the city's major hotels to ensure marketing, conference and concierge officers have all the information they need to promote Sydney's experiences and attractions to tourists before they visit and after they have arrived.

Marketing Sydney's experiences

The City has a role to play in delivering and marketing great experiences for domestic and international visitors to the city. Our focus will be on the variety of experiences on offer and how they are marketed, along with their uniqueness to Sydney and the promotion of a wider range of outdoor activities that takes advantage of our more sunny, temperate climate and the unique range of Australian gourmet foods and wine on offer.

We will also continue to deliver and market major events which contribute to the liveliness of the city and draw people to visit, including Sydney New Year's Eve, Christmas and Sydney Chinese New Year Festival. We will also continue our support for major festivals, events and celebrations that support tourism including the Sydney Festival, the Biennale of Sydney, the Sydney Film Festival, the Sydney Writers' Festival and the Sydney Fringe Festival.

We will continue to work with Destination NSW to both secure and market high-quality international events and first-run premieres of musicals, before other Australian cities and provide a consistent branding message.

Marketing Sydney globally

The City has in place a partnership with Destination NSW to promote Sydney as a destination of choice in both domestic and international markets through a variety of ways. This includes local and international marketing campaigns through media channels as well as strategic partnerships.

We will support the work of Business Events Sydney to attract and retain large conferences and conventions in Sydney and seek to supplement tourist troughs during the year and will raise hotel occupancy levels, drive increased spend by delegates on hotels, bars, restaurants and shops in the city. We will also partner with significant conferences with a large contingent of international delegates and help to increase the city's global exposure. The City will also work with partners to increase support for attracting international students, their families and visitors (business people and tourists) from Asia.



Major projects

Major projects that focus on *Destination Marketing* for Sydney include:

- We will continue to produce, in partnership with Destination NSW *The Official Guide to Sydney* booklet available to tourists at Sydney Airport (domestic and international), as well as information kiosks at Circular Quay, The Rocks, Town Hall and Haymarket;
- We will continue to work with the producers of major festivals and events to leverage tourism and retail opportunities for city businesses;

- We will continue to develop our *What's On* website and make space available for events and experiences that are unique to Sydney and attractive to potential tourists; and
- Our investment will continue in the development of marketing material that promote the City's unique villages, which add to the quality and diversity of both the domestic and international tourist experience.

Details of all the projects and programs can be found in Appendix 1.

09

Measuring success

Overview

The actions set out in this plan have been devised to create a conducive environment for tourism businesses to flourish.

It is understood that the success of the tourism sector in Sydney will be influenced by the actions set out in this action plan and a range of factors as diverse as global economic conditions, Australian macroeconomic policy, technological trends, and the actions of individual tourism operators.

Nevertheless, it is important to understand and monitor broad trends in the sector and use this information to review and influence priorities and actions.

Indicator framework

The City of Sydney has developed a community indicator framework – a multidimensional approach to measuring wellbeing which addresses the combination and intersection of social, economic, environmental, cultural and governance conditions that exist in the city.

The indicators used to track change in the tourism sector will contribute to the community level indicator – dynamic, resilient local economies.



Tourism indicators

From the city's indicator framework there are two key indicators and nine measures to gauge the contribution of to the city's economy and how it might change over time. These are outlined in the table below.

This information is collected every five years and while it is quantitative in nature, can be supported by other data sources collected by Destination NSW and Tourism Australia, which are both qualitative and quantitative in assessment.

Additional city indicators may be developed over time as new information sources are identified.

The table at Appendix 2 sets out the indicators, the desired trend or target and the frequency for reporting.

10

Implementation and monitoring

Implementation

The projects identified in this action plan (Appendix 1) are high level, requiring greater definition and resources allocated for their delivery.

The City is aware that while there is a desire (and need) for immediate action and outcomes. This must be balanced with resources, capacity and competing priorities.

The projects included in this action plan have been prioritised according to current circumstances and indicative timeframes, and their activation identified as follows identified as follows:

Now – projects and programs underway or starting in the near future;

Next – project and programs commencing in the medium term; and

Later – projects and programs to start in the medium to longer term.

Start dates for projects led by the City will be confirmed on an annual basis as they are further developed and budgets and resources allocated for their delivery.

Review and monitoring

This action plan is based on the findings of extensive research and consultation done in 2011 and 2012. It also takes account of the recommendations arising from the NSW Government's response to the Visitor Economy Taskforce report.

However, the tourism environment is dynamic, and projects and priorities will change. Identified projects may not be required and new priorities will emerge.

Progress on the identified projects will be reported on an annual basis.

Progress toward the achievement of targets or the identification of trends will be reported on an annual basis, albeit some data will not be refreshed this frequently.

Priorities will be assessed annually based on the outcomes achieved and as new information on the needs of the sector become available.

A major review will be undertaken to coincide with the end of the first five years of the action plan.

11

Appendix 1

Actions

1. Destination development

What we will do?	How will we do it?	Who are the partners we need to make it happen?	On-going	Now	Next	Later
DEVELOPING CAPACITY						
Provide an investment and regulatory environment for the City of Sydney that supports and encourages private investment in accommodation facilities	Advocate to other levels of government and the property sector to increase the level of new hotel accommodation in the City, across a range of classifications.	NSW Government Tourism Accommodation Industry Property Industry		✓		
	Continue to work with Destination NSW, Department of Planning and Infrastructure to review and improve a stronger policy framework that provides greater support to the tourism industry that examines planning controls, provides development incentives, removes regulatory impediments, etc.	Destination NSW Department of Planning and Infrastructure	✓			
	Investigate through the Central Sydney Planning Review how planning controls can facilitate further hotel development in central Sydney.			✓		
	Identify appropriate planning mechanisms to facilitate the development of further visitor accommodation in areas outside of Central Sydney.		✓			
	Work with partners to encourage appropriate conservation and adaptive re-use of heritage buildings within the city for visitor accommodation and other tourism-related uses where it is consistent with the heritage significance of the building.	NSW Government Tourism Accommodation Industry Property Industry	✓			
	Through the established Memorandums of Understanding (MOUs) with the city's major universities, explore how to increase the supply of student accommodation provided both on and off campus for international students.	University of Technology, Sydney University of Sydney University of New South Wales	✓			

What we will do?	How will we do it?	Who are the partners we need to make it happen?	On-going	Now	Next	Later
Assist the State Government in completing an audit of Government property in Sydney CBD and key tourism precincts	Assist the Department of Finance and Services' Property Asset Utilisation Taskforce complete their Government property audit in Sydney CBD and key tourism precincts to identify potential opportunities for tourist accommodation developments.	Destination NSW Department of Finance and Services		✓		
Capitalise on the tourism potential of urban renewal sites and key development precincts in the city	Support the tourism potential of the city's key urban renewal sites through support and advocacy for the development of critical tourist infrastructure, including: –High-quality accommodation at Barangaroo; –The redevelopment of Darling Harbour; –Cultural spaces and amenities of varying scales that enhance the 'Cultural Ribbon' around the harbour; and –Completing the harbour foreshore walk at Barangaroo and Blackwattle Bay	Barangaroo Development Authority Lend Lease NSW Government Infrastructure NSW Destination NSW Office of Environment and Heritage		✓		
	Support the NSW Government in investigating the feasibility and location of new cultural facilities and infrastructure for Sydney.	Arts NSW Destination NSW		✓		
	Advocate to the Barangaroo Development Authority (BDA), the NSW Government and Lend Lease that proposals for the site's triple-ferry wharf and light rail services are delivered, and that direct transport services are provided to the area.	Barangaroo Development Authority Lend Lease NSW Government		✓		
Increase the capacity of the city to host large-scale concerts, conferences and conventions	Work collaboratively with the NSW Government on the redevelopment of the Sydney Entertainment and Convention Centre to improve the size, quality and responsiveness of the concert, conference, exhibition and convention infrastructure to ensure that Sydney is better positioned to secure large domestic and international events.	NSW Government Infrastructure NSW SHFA		✓		

What we will do?	How will we do it?	Who are the partners we need to make it happen?	On-going	Now	Next	Later
DEVELOPING CITY AREAS						
Invest in public domain improvements, infrastructure and services to enhance the attractiveness of central Sydney as a destination	In conjunction with the NSW Government, pedestrianise parts of George Street and deliver light rail as part of the Transforming Sydney project. The project will improve the pedestrian experience in central Sydney through the transformation of George Street into a pedestrian boulevard and a central spine, the opening up of laneways and cross streets, the investigation of new squares and civic spaces and advocating for pedestrians priority at intersections.	NSW Government Property owners Retail and hospitality businesses	✓			
	Encourage the rejuvenation of obsolescent buildings/areas in key destination precincts by stimulating market dynamics and supporting a regularly maintained public infrastructure and refurbishment/renewal works program.	Property owners	✓			
	Support NSW Government's endeavours to ensure Destination Management Plans address demand and supply, policy and planning issues.	Destination NSW	✓			
	Develop central Sydney as an accessible city that encourages families and others to visit more frequently. Continue to provide new or improved kerb ramps, accessible transport facilities and amenities.	NSW Government	✓			
	Continue to implement the Chinatown Public Domain Plan to improve visitor experiences within the Chinatown area, including new seating, lighting, public art, footpath treatments and road design to ease congestion, improve appearance and increase perceptions of safety for visitors.		✓			
	Continue to activate underutilised laneways and support fine grain retail spaces through public domain improvements and working with land owners and creative enterprise.	Property and business owners	✓			

What we will do?	How will we do it?	Who are the partners we need to make it happen?	On-going	Now	Next	Later
Further develop the tourism potential of Sydney's tourist precincts and villages	Work in an integrated manner with government and statutory authority partners to improve the tourism experience for visitors at key tourist precincts including the CBD, Haymarket, Rocks, Darling Harbour, the Botanic Gardens and Circular Quay.	NSW Government SHFA Cultural and arts organisations Local business operators and associations	✓			
	Work with local businesses and stakeholder groups to develop local tourism infrastructure within the City's Village precincts that offer unique and authentic visitor experiences outside the city centre.	NSW Government SHFA Cultural and arts organisations Local business operators and associations	✓			
	Work with the NSW Government, tourism operators, cultural and arts organisations and local business operators and associations to develop Walsh Bay/Dawes Point as a cultural tourism zone.	NSW Government SHFA Cultural and arts organisations Local business operators and associations	✓			
DEVELOPING CONNECTIONS						
Increase the capacity and quality of passenger cruise ship arrival facilities	Work with partners to manage passenger cruise ship arrivals to increase Sydney's profile as a destination point for domestic and international cruise liners.	NSW Government Cruise ship operators Destination NSW SHFA NSW Maritime Sydney Ports Corporation Surrounding councils	✓			
Manage the growth of Sydney's airports	Advocate to the Federal Government and Sydney Airport to sustainably manage the growth of the airports and the expansion of operating hours, flight paths and runways to ensure visitor demand is addressed in a way that balances the needs of visitors, local residents and businesses	Federal Government Airport operators	✓			
Improve intrastate and interstate public transport links to Sydney	Advocate to the NSW Government to improve the speed, number, quality and volume of rail services from rural and regional NSW, particularly from key locations such as the Central Coast, Newcastle and Wollongong.	NSW Government Federal Government	✓			
	Continue to work with the NSW and Federal Government to ensure visitor needs and access to key visitor precincts and event destinations are addressed in the NSW Government's Long Term Transport Master Plan.	NSW Government Federal Government	✓			
DEVELOPING SUSTAINABLY						

What we will do?	How will we do it?	Who are the partners we need to make it happen?	On-going	Now	Next	Later
Review and enhance City of Sydney policies and procedures relating to sustainability within the tourism sector	Review our policies and procedures and establish corporate green event and food guidelines, accommodation and business event procurement standards and sponsorship standards. These include: –Ethical Food Guidelines (in place) –Sustainable Event Management Policy (in place) –Environmental Management Plan (in place) –Sustainable Procurement Policy –Sustainable Procurement Guideline –Environmental Management System			✓ ✓ ✓ ✓ ✓ ✓	✓	
	Develop an online Environmental Manual with links to the relevant Sustainability documents.			✓		
Assist the sector to create baseline data, develop emission reduction strategies and transparently report on their performance	Undertake a carbon footprint study and develop interim targets in the tourism sector.	Tourism Australia Destination NSW Office of Environment and Heritage Sydney Harbour Foreshore Authority Tourism Research Australia Australian Hotels Association Business Events Sydney Tourism and Transport Forum Earthcheck Retail businesses		✓		
	Work with partners to investigate: –Forming a Green Tourism working Group; and –Developing a centralised website providing relevant sustainability information.	Tourism Australia Destination NSW Office of Environment and Heritage Sydney Harbour Foreshore Authority Tourism Research Australia Australian Hotels Association Business Events Sydney Tourism and Transport Forum Earthcheck Retail businesses		✓		

What we will do?	How will we do it?	Who are the partners we need to make it happen?	On-going	Now	Next	Later
Assist the sector to create baseline data, develop emission reduction strategies and transparently report on their performance	Investigate options to establish a public monitoring and reporting framework for environmental performance and review and identification of relevant green accreditation schemes.	Tourism Australia Destination NSW Office of Environment and Heritage Sydney Harbour Foreshore Authority Tourism Research Australia Australian Hotels Association Business Events Sydney Tourism and Transport Forum Earthcheck Retail businesses			✓	
Identify Policy levers as drivers for environmental improvement	Undertake an analysis of the policy levers available to drive improved environmental performance for tourism operators including incentives for meeting agreed sustainability standards.			✓		
DEVELOPING COMMUNITIES AND BUSINESS						
Increase capacity within the City's communities and businesses to better support the tourism sector	Support Sydney's tourism related businesses through programs that enable them to take further advantage of critical tourist growth markets, such as our China Connect program.	Business owners and operators	✓			
Development of Aboriginal and Torres Strait Islander peoples' tourism infrastructure and experiences and visitor economy employment opportunities	Work with our Aboriginal and Torres Strait Islander Advisory Panel and others to develop cultural tourism infrastructure that seeks to educate, investigate and celebrate Aboriginal and Torres Strait Islander peoples' history and culture as part of our Eora Journey project.	NSW Government Federal Government Aboriginal and Torres Strait Islander Panel Cultural organisations Businesses	✓			
	Support Industry and Government initiatives to promote and develop career opportunities for Aboriginal and Torres Strait Islander trainees in visitor economy occupations within Sydney.	NSW Government Federal Government Aboriginal and Torres Strait Islander Panel Cultural organisations Businesses		✓		

What we will do?	How will we do it?	Who are the partners we need to make it happen?	On-going	Now	Next	Later
SUSTAINING CAPACITY AND BUILDING ECONOMIC GROWTH THROUGH EVENTS MANAGEMENT						
Support underlying demand for existing and new hotels resulting in higher occupancy levels as well as stimulate visitor and retail economic growth	The City will work with partners to improve the integrated management of year around business, retail, cultural and tourist events, business conferences and tailored events packages to attract international and domestic visitors.	NSW Government Destination NSW Business Events Sydney Australian Hotels Association Major Festivals and Events Organisers Cruise Ship Operators Arts and cultural organisations Aboriginal and Torres Strait Islander Panel Retail Advisory Panel Local business and retailers	✓			
Support development of a long term, comprehensive events and festivals strategy for NSW	Continue to work with Destination NSW and other partners to assist their efforts on developing a long term comprehensive state-wide events and festivals strategy that includes major and smaller events and festivals.	Destination NSW	✓			
DEVELOPING REASONS TO VISIT						
Support high-profile events and business conferences which attract visitors to Sydney and raise the City's profile internationally	Invest \$1.5 million during 2014–16 and work with Business Events Sydney to secure an increasing number of conferences and business events held within Sydney.	Business Events Sydney	✓			
	Continue to work with Destination NSW to secure high-quality international events and first-run premiere musicals to Sydney, ahead of other Australian and international cities.	Destination NSW	✓			
	Continue to deliver large-scale public events which contribute to the liveliness and cultural vitality of the Sydney such as Sydney New Year, Sydney Chinese New Year and Art and About.		✓			
	Continue to support arts and cultural organisations to deliver internationally recognised festivals and events which act as catalysts to drive visitors to Sydney including the Sydney Festival, Sydney Writers' Festival, the Sydney Film Festival, Sydney Mardi Gras, Biennale of Sydney and the Sydney Fringe Festival.	Arts and cultural organisations	✓			

What we will do?	How will we do it?	Who are the partners we need to make it happen?	On-going	Now	Next	Later
Work with retail partners to position Sydney as Australia's premier retail destination, with a shopping experience in the city that matches those found in comparable global cities	Continue to work with and provide support to the Retail Advisory Panel, established to provide the City with strategic advice on the future direction of retailing.	Retail Advisory Panel NSW Government Retailers	✓			
	Explore ways to support the development and growth of entrepreneurs and new businesses in the retail sector, including: –The encouragement of pop-up retail outlets for the testing of products in development; and –Incubator spaces for emerging creative enterprise.			✓		

2. Destination management

What we will do?		How will we do it?	Who are the partners we need to make it happen?	On-going	Now	Next	Later
MANAGING CITY ENVIRONMENT							
Maintain the city streets and public areas	Continue to provide a high level of maintenance, cleansing and servicing of the city streets and public domain areas to contribute to a high quality visitor experience.		✓				
Increase community safety and perceptions of safety, particularly at night	Continue to maintain our network of CCTV cameras and install new ones in areas as appropriate, working closely with the NSW Police Force to monitor the footage across the network and respond to public safety issues.	NSW Police Force NSW Government	✓				
	Deliver the OPEN Sydney: Late Night Economy Action Plan, putting in place mechanisms to manage the movement of visitors and residents throughout the city at night, particularly in entertainment hot spots such as Kings Cross, George Street and Oxford Street.	NSW Government		✓			
	Work with accommodation providers, educational institutions and licensed venue operators to increase their knowledge and capacity to provide advice to visitors in relation to personal safety, access to public transport and movement between accommodation and tourist destinations.	Accommodation sector Universities and colleges AHA NSW Government	✓				
MANAGING VISITOR NAVIGATION							
Improve the way in which visitors navigate around the city	Work with partners to develop a way-finding strategy and a signage code to provide consistent direction and advice to visitors as they move around the city and to and from tourist hot spots.	Destination NSW Transport NSW SHFA Retailers Access advocacy groups		✓			
	Collaborate with Destination NSW in the development of digital-based visitor information that facilitates way finding.	Destination NSW		✓			
MANAGING VISITOR ARRIVALS							
Improve the quality and scope of tourist services for cruise ship passengers	Explore how visitor information services and 'meet and greet' facilities can be implemented and improved at the Overseas Passenger Terminal and White Bay during the cruise ship season.	Cruise Ship Operators Destination NSW SHFA Ports Authority	✓				
	Work with cruise ship operators to provide DVD and online information about Sydney to cruise ship passengers and crew prior to arrival at port.	Destination NSW Cruise ship operators		✓			
	Continue to work with Destination NSW and the retail industry to encourage cruise ship passengers to access Sydney's retail market.	Destination NSW Retailers Cruise ship operators		✓			

What we will do?	How will we do it?	Who are the partners we need to make it happen?	Who are the partners we need to make it happen?			
			On-going	Now	Next	Later
Improve the quality and scope of tourist services for visitors arriving at Sydney International Airport	Work with partners to improve the quality and availability of tourist information at Sydney International Airport.	Destination NSW SHFA Sydney Airport	✓			
	Work with partners to explore provision of a coordinated welcome for international students to Sydney.	Universities and colleges		✓		
MANAGING VISITOR TRANSPORT						
Increase the range of public transport options available to visitors and the ease in which they can access them	Support the NSW Government in delivering an increased range of public transport options throughout Sydney, including light rail, as proposed within the NSW Long Term Transport Master Plan.	NSW Government		✓		
	Advocate to the NSW Government to improve customer experience on public transport and a more integrated transport precinct through the City Centre Access Plan.	NSW Government		✓		
	Support and assist in the implementation of the City Centre Access Plan.	NSW Government			✓	
	Work in partnership with the NSW Government through the CSTTC (Central Sydney Traffic and Transport Committee) to improve coach and taxi infrastructure within Central Sydney.	NSW Government		✓		
	Advocate to the NSW Government to reduce the ticket prices for access to both the domestic and international airport terminal stations to encourage visitors to use public transport to enter and exit the city.	NSW Government Sydney Airport		✓		
	Continue to invest in the development of our cycled paths network to allow visitors to cycle around the city and make connections with other bike networks to tourist attractions such as Bondi Beach, Centennial Park and Taronga Zoo.	Neighbouring councils	✓			
	Deliver the goals of OPEN Sydney: Future Directions for Sydney at Night strategy. This will increase night public transport options, improve safety, ease of use and availability of taxis, security, information for users, multi-hiring and taxi services at night and improve information systems for car parking availability & bicycle access at night.	NSW Government Taxi Operators		✓		
	Support Transport for NSW endeavours to increase the frequency and hours of operation of late-night public transport services during major events.	NSW Government	✓			
MANAGING VISITOR FEEDBACK						
Monitor visitor satisfaction levels, and ensure feedback is incorporated into City of Sydney decision making processes	Work with partners to monitor the level of tourist satisfaction in the LGA through surveys which will include visitor impressions of the city and its villages, visitor servicing, signage, attractions and the likelihood of a return visit, and ensure that this feedback is incorporated into City of Sydney decision making processes.	Destination NSW SHFA		✓		

3. Destination marketing

		Who are the partners we need to make it happen?	On-going	Now	Next	Later
What we will do?	How will we do it?					
MARKETING TO VISITORS IN THE CITY						
Develop, deliver and distribute high-quality tourist information and positioning Sydney as a world-class, unique tourist and retail destination	Work with Destination NSW to support a dedicated visitor servicing entity for Sydney. The Government's aspirations for this entity are that it includes the establishment of free wifi information hotspots in the City, provision of improved public transport information, smartphone apps, and purpose designed brochures.	Destination NSW SHFA Tourism operators Hotel operators Local businesses and associations NSW Trade and Investment		✓		
	Work with partners to review the role, location and operation of traditional visitor information centres located throughout the city.	Destination NSW SHFA	✓			
	In partnership with Destination NSW, SHFA, tourism operators and businesses, support the provision of tourist information including the <i>Official Guide to Sydney</i> , and information on transport and access to cultural facilities and events.	Destination NSW	✓			
	Support Destination NSW in their efforts to develop and implement cultural awareness, customer service and quality assurance training programs in educational institutions and Government.	Destination NSW Business operators	✓			
	Work with partners to increase support for attracting international students, their families and visitors (business people and tourists) from Asia.	Destination NSW Universities and Other Tertiary Educational Institutions	✓			
	Continue to explore the development of new tourist information kiosks in areas of the city such as, Newtown, Oxford Street and Central Station, and investigate increasing opening hours at peak periods.				✓	
	Ensure marketing collateral is translated into multiple languages to service the needs of visitors from growth markets including China, Korea, Indonesia and India. This includes marketing opportunities where there may be tax advantages and cheaper travelling and shopping opportunities in Sydney where luxury fashion and travel magazines can promote these travel and retail opportunities as part of a consistent, high profile branding message.	Luxury Fashion and Travel Magazine Publishers and Specialised and High End Retailers			✓	
	Support Destination NSW and NSW Trade and Investment's efforts in fast tracking wider acceptance of China Union Pay cards.	Destination NSW and NSW Trade and Investment			✓	

What we will do?	How will we do it?	Who are the partners we need to make it happen?	Who are the partners we need to make it happen?			
			On-going	Now	Next	Later
Increase visitation by developing and implementing a long term brand strategy for Sydney that focuses on priority target markets	Continue to work with Destination NSW in developing a brand strategy for Sydney, market destinations, event experiences and holiday offers to target trade and consumer markets.	Destination NSW		✓		
Employ a greater use of digital marketing and promotions and also improve complementary digital information services links in visitor marketing resources	Continue to work with Destination NSW in directing more digital media, improved service links and marketing resources at the visitor economy.	Destination NSW		✓		
MARKETING SYDNEY'S EXPERIENCES						
Promote Sydney's brand, and its villages, precincts and fine grain experiences	Through joint working with Destination NSW, develop new and unique marketing materials which complement Sydney's overall brand and input into digital marketing resources such as the Sydney.com portal.	Destination NSW	✓			
	Produce marketing materials in partnership with city businesses, and arts and cultural organisations, which promote the unique character of each of the city's 10 villages.	Local businesses and associations Cultural organisations	✓			
	Work with Destination NSW and local business chambers and associations to develop area-based marketing campaigns (using digital technology where appropriate) that link the unique experiences in an area including cultural infrastructure, creative enterprise, events, restaurants, bars and cafés.	Destination NSW Local businesses and associations	✓			
	Invest in a program of regular redesigning, updating and digitally supporting our walking tour guides including history guides such as <i>Parade</i> , <i>Passion</i> and <i>Renewal</i> ; cultural guides such as <i>Barani Barrabugu</i> which explores Sydney Aboriginal peoples' history and culture, and those which focus on public art and installations.		✓			
	Continue to support Destinations NSW's implementation of an Aboriginal Tourism Action Plan.	Destination NSW	✓			

What we will do?	How will we do it?	Who are the partners we need to make it happen?	Who are the partners we need to make it happen?			
			On-going	Now	Next	Later
Promote and market Sydney's world-class tourism infrastructure, events and celebrations	Work in partnership with Destination NSW, SHFA and hotel operators to deliver information sessions to hotel managers and concierge staff about major upcoming attractions, events and celebrations for suitable for tourists before and during their stay in Sydney.	Destination NSW SHFA Event organisers Hotel operators Major festival organisers	✓			
	Work with the organisers of major festivals that we support to leverage domestic and international marketing opportunities and further position Sydney as a global leader in cultural tourism. This includes the Sydney Festival, Mardi Gras, the Biennale of Sydney, the Sydney Film Festival, Sydney Fringe Festival, the Sydney Writer's Festival major musical premieres and similar events.	Destination NSW Major festival organisers	✓			
	Continue to promote Sydney's calendar of events through our leading 'What's On' website.		✓			
MARKETING SYDNEY GLOBALLY						
Raise Sydney's global profile to attract international leisure and business visitors	Promote Sydney as a destination of choice to developed and emerging tourist markets through established offices and targeted trade and tourism missions.	Trade and Investment Destination NSW Austrade Tourism Australia Other government agencies Business Events Sydney	✓			
	Continue to facilitate partner relationships that leverage tourism and trade opportunities with Chinese provinces through our annual Sydney Chinese New Year Festival and Sydney-China Business Forum.	Trade and Investment Destination NSW Business Events Sydney University of Sydney	✓			
	Support Destination NSW in the development and implementation of key strategies that will take advantage of strategically important growth markets, including the newly developed China Tourism Strategy 2012-20.	Destination NSW	✓			
	Support the NSW Government in adopting a whole-of-government approach to attracting and hosting business events, funding, brand development, planning and integration of events with Sydney's visitor economy.	Trade & Investment Destination NSW Business Events Sydney	✓			
	Continue to work with organisers of large conferences and conventions to maximise marketing and promotional opportunities targeted at interstate and international delegates that communicate positive messages about the tourist experience in Sydney and encourage return visits.	Conference organisers	✓			

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Appendix 2

Performance measures and baseline data

Community indicator framework: dynamic, resilient local economies			
Tourism Action Plan			
Indicator	Measure	Trend or target	Reporting frequency
Economic diversity	Number of businesses in tourism sector	Stable or increasing ↔ or ↑	Five-yearly from 2007
	Estimated tourism sector employment	Stable or increasing ↔ or ↑	Five-yearly from 2007
	Tourism sector employment as a percentage of overall employment		
International/ visitor engagement	Occupancy rate (accommodation)	Stable or increasing ↔ or ↑	Yearly
	Total room stock (accommodation)	Stable or increasing ↔ or ↑	Yearly
	Average takings per room per night	Stable or increasing ↔ or ↑	Yearly
	Guest nights	Stable or increasing ↔ or ↑	Yearly
	Annual accommodation visitors to metropolitan Sydney	Stable or increasing ↔ or ↑	Yearly
	% of metropolitan visitors staying in the City of Sydney LGA	Stable or increasing ↔ or ↑	Yearly
	Seasonality – number of visitor nights by month	Stable or increasing ↔ or ↑	Yearly

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