

CIRCULAR QUAY

# Visitor information servicing in Sydney

FINAL REPORT  
DECEMBER 2010



Tourism New South Wales

Tourism NSW is a division of Industry and Investment



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# Situation Analysis

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Tourism is vital to Sydney's economy. In 2009 Sydney received an estimated 25.5 million domestic and international visitors who spent around \$11.5 billion in the city. Tourism NSW and the industry have recognised the need for a more co-ordinated approach to the provision of visitor information in the Greater Sydney area (including the Central Business District, west to Penrith, south west to Picton and north to the Hawkesbury).

Sydney's visitor information is primarily provided by State and Local Government as well as private sector organisations. The industry has raised issues such as the need to improve the quality, consistency and distribution of information.

Tourism NSW decided that a strategy could be developed in consultation with industry to address these issues. It also acknowledged that identification of gaps in the market could create opportunities for commercial providers and benefit the industry. Enhancing the visitor experience will benefit the State's economy by encouraging tourists to stay longer, spend more and make a return visit.

## BACKGROUND TO THE REVIEW

In March this year Tourism NSW commenced a *Review of Visitor Information Servicing in Sydney*, from a visitor's perspective. The review was conducted jointly with relevant government agencies and industry members. A Review Group comprising key industry organisations and representatives was convened to provide advice and input to the review. Members are listed in Appendix A.

The aim of the review was to develop recommendations for industry and Government regarding the most efficient and useful ways to deliver visitor information to enhance visitors' experience in Sydney. The review paid particular attention to rapid changes in technology and included the role of Visitor Information Centres, key websites and publications. A similar review for regional NSW is being planned.

## MISSION

The Review Group identified the mission of the review: *To enable every visitor arriving in Sydney to access tourist information about Sydney and NSW in order to achieve the most fulfilling visitor experience in Australia.*

## TERMS OF REFERENCE

Examine current visitor information provision in the Greater Sydney area, including the role of visitor information centres and *Sydney, the Official Guide*.

Identify trends and examples of excellence in meeting visitor information needs.

Identify opportunities for Government and industry to enhance the visitor experience through improved visitor information provision.

# Review group consultations

The Review Group was convened to discuss the current approach to visitor information delivery and develop actions to improve the system, as set out in the Group's terms of reference.

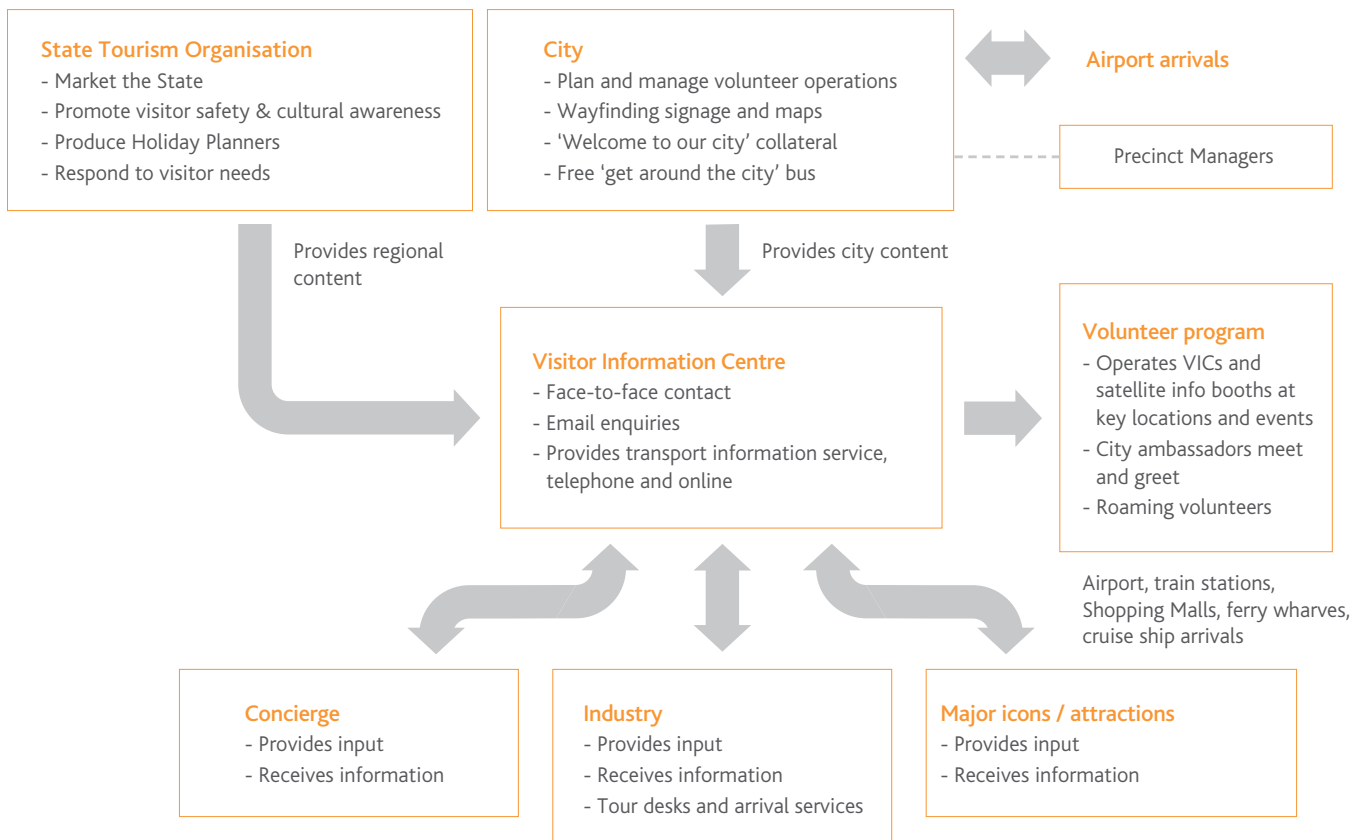
## A MODEL OF VISITOR INFORMATION SERVICING IN SYDNEY

A key suggestion by the Review Group was that a model be developed for visitor information servicing in Sydney. To develop the model the group was asked to envisage an ideal system and how it would work. It was decided that the model would underpin the strategies and recommendations from this review.

The Review Group agreed that the model could be expanded to incorporate details on visitor behaviours, types of visitors, the landscape and geography of Sydney, precincts, landmarks, touch-points between visitors and information providers, efficiencies, people flow and the types of experiences available.

The group highlighted the need for the range of visitor information services and products to be shared among the industry. To help prevent a "silo" effect, an ongoing exchange of information would assist the industry to provide the best and most appropriate service or product to visitors.

### Preliminary Model of Typical Face-to-Face Visitor Information Servicing in Australian Cities



Note: A model will be developed that is specific to Sydney.

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## SOURCES OF VISITOR INFORMATION IN SYDNEY

A wide range of Government and private sector organisations provide visitor information in Sydney. Some of the major sources of information are:

- Two main Accredited Visitor Information Centres (AVICs) in Sydney in The Rocks and at Darling Harbour. Operated by the Sydney Harbour Foreshore Authority (SHFA).
- Accredited Visitor Information Kiosks located at Town Hall and Circular Quay, run by the City of Sydney.
- Sydney Airport Corporation currently runs a Visitor Information desk in the International Airport Arrivals Hall and this service is currently being expanded.

Tourism NSW's activities include the websites [www.sydney.com](http://www.sydney.com) and [www.visitnsw.com](http://www.visitnsw.com) in nine languages – English, International English, German, French, Italian, Japanese, Traditional Chinese, Simplified Chinese and Korean. There are Sydney branded social media channels on *Facebook*, *YouTube* and *Twitter* and an iPhone application.

*Sydney, the Official Guide* is published in English, Chinese, Japanese and Korean. It mainly targets international visitors and is produced via a partnership between Tourism NSW, the City of Sydney and SHFA. It is also available on [sydney.com](http://sydney.com).

SHFA's information services include three websites [www.shfa.nsw.gov.au](http://www.shfa.nsw.gov.au), [www.therocks.com](http://www.therocks.com) and [www.darlingharbour.com](http://www.darlingharbour.com) as well as publications and maps. The City of Sydney's activities include a website [www.cityofsydney.nsw.gov.au](http://www.cityofsydney.nsw.gov.au) and materials such as maps and events brochures.

The National Parks and Wildlife Service operates 19 centres of varying scale in the Greater Sydney area providing information on National Parks experiences locally and around the State. It also produces a wide range of brochures, a visitor guide and provides a website at [www.environment.nsw.gov.au/nationalparks/](http://www.environment.nsw.gov.au/nationalparks/).

AVICs are also located in destinations throughout Greater Sydney run by various Local Governments.

Greater Sydney Tourism Inc's activities include a 50-page *Discover Greater Sydney* guide which is designed for the "visiting friends and relatives" self-drive market and is a private sector magazine. Its website provides links to visitor information on council websites in the Greater Sydney area.

Many other important sources of visitor information are also available on a range of Government websites including transport sites. The public transport info line (131 500) is also an important service. Websites such as *Citysearch*, [Sydney100.com](http://Sydney100.com), café and restaurant guides and the entertainment pages of the Sydney newspapers are popular sources of information. There is also a range of maps, guidebooks and "what's on" guides produced by the private sector. An audit of current Sydney visitor information services and products provided by the members of the Review Group is included in Appendix B.

# Additional consultation

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## ADVICE FROM CONCIERGE AND FRONT OF HOUSE MANAGERS

Tourism NSW and the Australian Hotels Association (AHA) NSW co-hosted a forum for concierge and hotel front of house managers in June 2010 to seek their views on ways to improve the provision of visitor information and enhance the visitor experience in Sydney.

More than 30 concierge and front of house managers from Sydney's leading hotels attended the Concierge Forum at the Shangri-La Hotel.

The views of concierge and front of house managers were shared with the Review Group. A list of the suggestions and recommendations are included in Appendix C.



## MEETING WITH THE NSW TAXI COUNCIL

Tourism NSW met with the NSW Taxi Council in July 2010. The discussion included ways that Tourism NSW could inform taxi drivers about key sources of visitor information that they could pass on to their passengers.

The suggestions included:

- Inclusion of tourism-related information and items in the NSW Taxi Council's bi-monthly magazine *Meter* (hard copy and on-line), distributed to 35,000 taxi drivers in NSW.
- The opportunity to contribute details about visitor information sources such as [www.sydney.com](http://www.sydney.com) and the location of visitor information centres/outlets at NSW Taxi Council driver seminars. Two seminars are held per month for driver training.
- Submission of event information to the NSW Taxi Council Events Calendar which is updated and distributed bi-monthly.

# Trends

The *Review of Visitor Information Servicing in Sydney* took into account the latest research into visitor behaviour and information sources used.

Key findings presented to the Review Group included:

## VISITOR BEHAVIOUR

- Visitor movement in Sydney is based on the city core or 'spine'. Once people have found a path from A to B they tend to retrace their steps or use the same path on future trips. There is a tendency for tourists to focus their movement around George Street, Darling Harbour and the Central Business District.<sup>1</sup>
- Visitors tend to use landmarks to navigate around Sydney.
- Different types of visitors have varied information needs.
- Visitors require different information at the planning, booking and visiting stages of their trip.

## POST-ARRIVAL INFORMATION

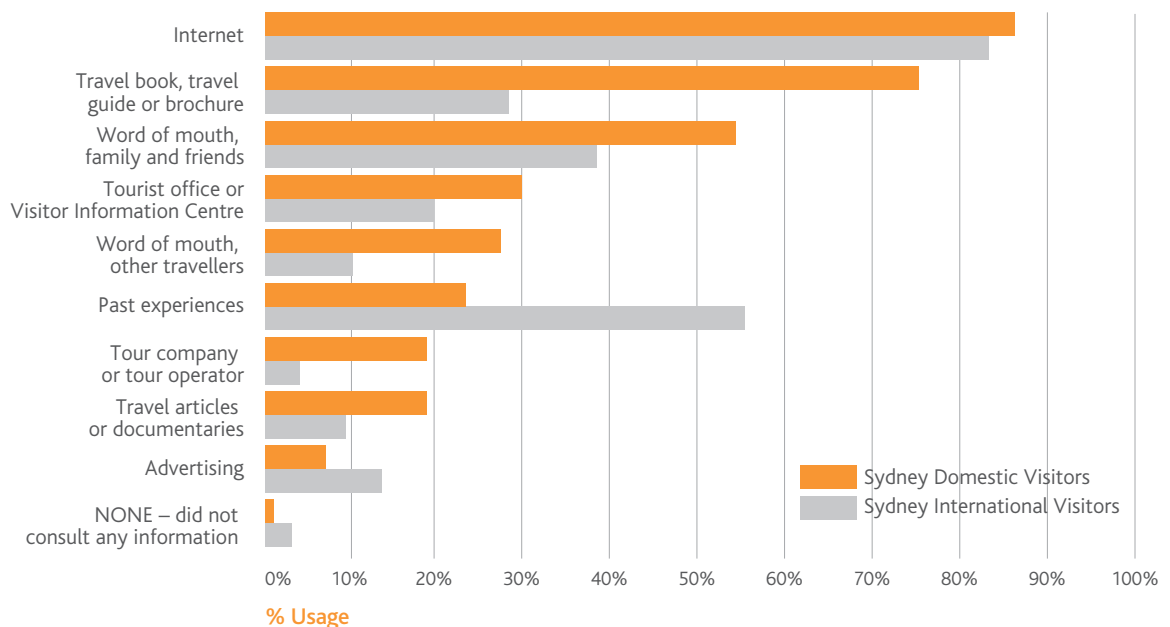
- Visitors to Sydney are generally satisfied with information available for trip planning but less satisfied with signage (especially international visitors) and the helpfulness of local people (especially domestic visitors) after arriving in Sydney.<sup>1</sup>
- Both domestic and international visitors considered that "reasonably priced public transport" was an area that needed improvement.<sup>1</sup>
- Once in Sydney visitors prefer to use a "trusted source" for information and like to have personal contact with providers.

## BACKPACKERS

- The top information sources used by backpackers before their trip were: friends/family member (69.8%), travel guide books such as *Lonely Planet* and *Rough Guide* (58.8%) and search engines (58.3%). During their trip they sourced information from other travellers (68%), tour brochures (50.7%) and search engines (47.8%).<sup>2</sup>

## Comparison of sources of information for international and domestic tourists

Data collected from October 2008 to February 2009<sup>1</sup>.



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- Top five websites used by backpackers before and during their trip and for bookings were: *Google* (48%), airline websites (36%), *Hostelbookers.com* (18%), *Lonelyplanet.com* (18%) and *Hostelworld.com* (15%).<sup>2</sup>
  - *Facebook* (64%) was by far the most heavily used social networking website by backpackers for staying in touch with travellers. It was also the most popular site for staying in touch with home (58%), joining and contributing to a backpacker group (18%); and uploading photos (59%).<sup>2</sup>
  - 70% of backpackers used a mobile phone to make calls while travelling.<sup>2</sup>

### MAPS AND BROCHURES

- The maps were the most referred to part of *Sydney, the Official Guide*, followed by "Sydney and beyond" and "Discount coupons".<sup>3</sup>
- There is a wide range of maps available to tourists but no single/consistent one.
- Almost all respondents (88%) researched online prior to visiting Sydney.<sup>3</sup>
- Visitors are interested in "10 Things to See and Do" and "Hidden Secrets".<sup>3</sup>
- Relate information to maps: When information is plotted on a map, people feel it completes the picture for them. It is useful in the first stages of planning.<sup>4</sup>

### ONLINE INFORMATION

- The internet is the most important information source for both domestic and international visitors.<sup>1</sup>
- Search engines, online travel agencies and company sites are by far the most popular with Australian people who use the internet to make travel plans.<sup>5</sup>
- People who use the internet to make travel reservations or payments rate online travel agencies and company sites as being the most important followed by search engines.<sup>5</sup>

- 36% of people who use the internet to make travel plans confirmed that they look at comments and materials other travellers have posted online and 24% read travel related blogs.<sup>5</sup>
- People who use the internet to make travel plans, reservations and payments show a high inclination to adapt to and use new technology. As the internet becomes more aligned to other technologies such as mobile phones and navigation systems, tourism providers need to grasp the opportunities which will arise and be aware of the threats of being an 'online laggard'.<sup>5</sup>

### WEB 2.0 SOCIAL NETWORKING

- Tourism operators and destination marketing organisations cannot ignore the rising popularity of sites containing user-generated content or the role that they may play in the travel planning behaviour of consumers.<sup>6</sup>
- User-generated content sites appear to be acting as an "additional source of information" which travellers can consider as part of their information search process, rather than as the only source of information. Most consumers are considering the information provided on user-generated content sites along with a wide range of other existing sources of information.<sup>6</sup>

### MOBILE TECHNOLOGIES

- Of the information services Australian people use on their mobile phones, 35% of people used maps, location and traffic information and 24% used restaurant or café information.<sup>7</sup>
- 41% of Australians look for information on products and services on a mobile phone.<sup>8</sup>
- 40% of Australian people used a social networking site on their mobile phone.<sup>8</sup>
- 19% of Australian people make bookings on mobile phones.<sup>8</sup>

- Mobile location-specific applications such as *Around Me*, *TripAdvisor* and *Four Square* are growing in popularity. Tourism NSW has an iPhone application for Sydney.
- Up to 80% of all travellers now pack their mobile/ smart phone to take travelling.<sup>9</sup>
- 67% of non-United States travellers would book a flight/hotel/car on their phone while travelling (with a trusted provider).<sup>9</sup>

### SYDNEY VISITOR TYPES

Sydney receives a range of visitor types with information needs that vary according to the following:

- Where they have come from
- Where they have been before
- Their length of stay
- Where they are staying
- Who they are travelling with
- The purpose of their visit
- Their travel budget.

The following visitor types were considered by the Review Group and their information needs were analysed:

Families	Pre-trip touchpoints	After arrival touchpoints
<p>In 2009 around 2.9 million parents with children living at home visited Sydney. About 79% were domestic and 21% were international visitors.</p>	<ul style="list-style-type: none"> <li>• “Word of mouth” from friends and relatives (visiting friends and relatives is often a primary motivator for families with young children). They also get information from other people who have been there with kids of a similar age.</li> <li>• Domestic families might be motivated by events (e.g. Easter Show).</li> <li>• Families with older children are likely to get their kids involved in trip planning and searching the internet for things to do.</li> <li>• International families probably source some information from tour operators/travel agents.</li> </ul>	<ul style="list-style-type: none"> <li>• “Word of mouth” from people they stay with, and locals they meet including taxi drivers, waiters etc.</li> <li>• International families use guide-books and also are likely to get information from tour-guides, and from referrals from attractions that they visit.</li> <li>• Those with small children are quite interested in getting “the big brochure with everything in it to do”.</li> <li>• Domestic families with older kids very interested in the “bright lights” aspect of Sydney and “what’s on” websites.</li> <li>• International families likely to use accredited visitor information kiosks and ask for directions from people in the street.</li> <li>• There are some brochures and magazines aimed at families travelling with kids – “Sydney’s child”, etc.</li> <li>• Weekend newspapers often have good information about activities for families.</li> </ul>

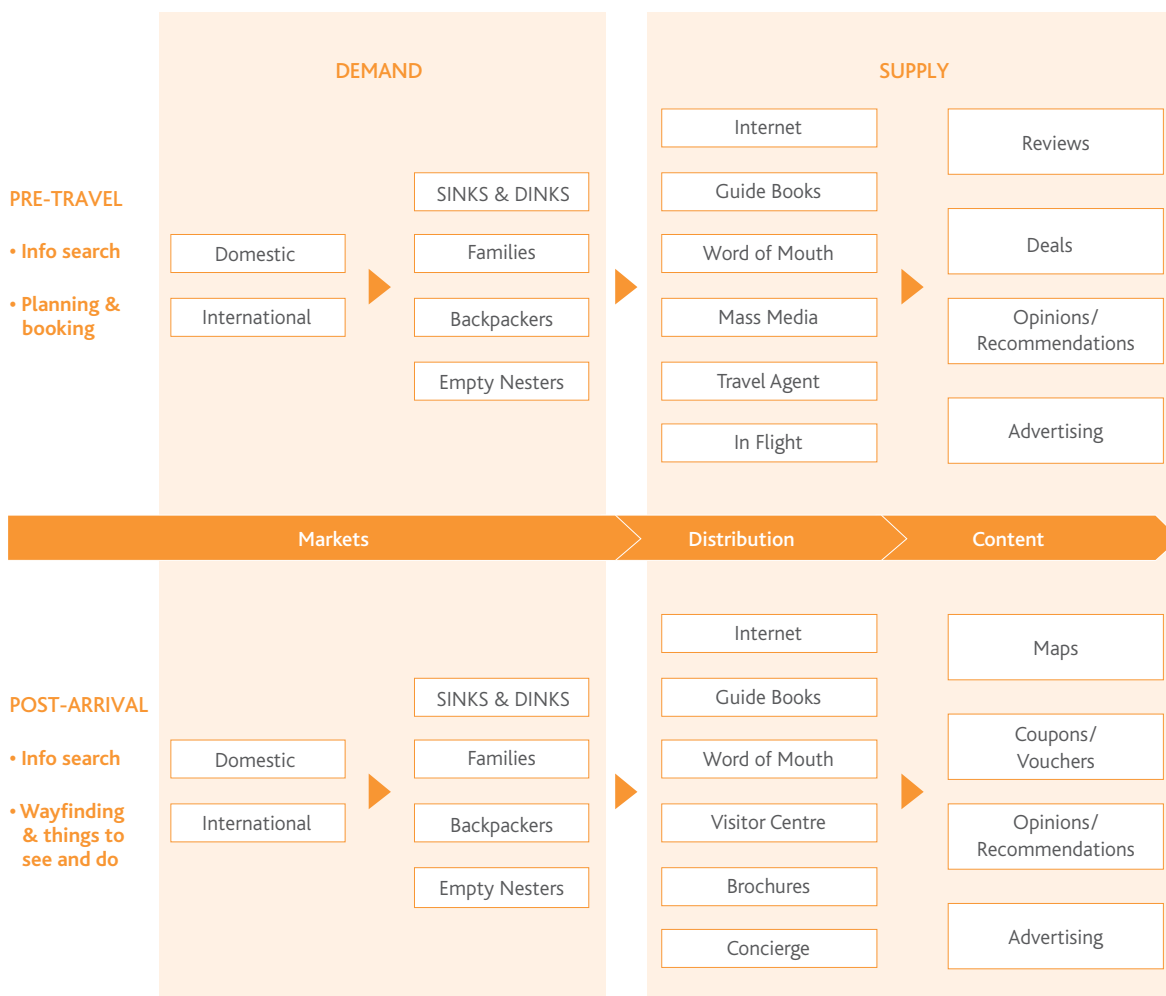
Empty Nesters	Pre-trip touchpoints	After arrival touchpoints
<p>In 2009 around 2.3 million empty nesters or "grey nomads" visited Sydney. About 81% were domestic and 19% were international visitors.</p>	<ul style="list-style-type: none"> <li>• Use of internet (initially using search engines), to search the destination.</li> <li>• May search by special interest.</li> <li>• Look for activities in proximity to accommodation in Sydney.</li> <li>• "Word of mouth" – including on-line forums.</li> <li>• Look for trusted sources (government sites or member-based like motoring associations).</li> <li>• Use travel sections in the print media.</li> <li>• Use travel agents.</li> <li>• Alumni groups can act as an influencer.</li> </ul>	<ul style="list-style-type: none"> <li>• Accommodation advice (hosts or concierges)</li> <li>• Accredited visitor information outlets</li> <li>• Orientation – way-finding and maps (desire to get to a pre-planned point of interest)</li> <li>• Consistency of look and feel and messaging (terminology used etc)</li> <li>• Need for personalised contact (mainly around orientation, interested in meeting people from a like-minded demographic, volunteers). A starting point could be events.</li> <li>• Interested in "what's on" information to offer an authentic experience beyond the permanent attractions.</li> <li>• Not interested in noise, overcrowding and queues.</li> </ul>

Young couples/DINKS (double income, no kids)	Pre-trip touchpoints	After arrival touchpoints
<p>In 2009 around 484,000 young couples or DINKS (double income no kids) visited Sydney. About 64% were domestic and 36% were international visitors.</p>	<ul style="list-style-type: none"> <li>• Likely to source their information about Sydney via the internet, mass media (domestic), in-flight (international) and "word of mouth".</li> <li>• Gaps in information include lack of information on non-commercial attractions such as Mrs Macquarie's Chair, transport information including getting from the airport to the CBD and distance orientation.</li> </ul>	<ul style="list-style-type: none"> <li>• Likely to use hotel/concierge, visitor information centres, internet, maps, "word of mouth" and taxi drivers.</li> <li>• Gaps in information include visitor information centres in prime CBD locations such as Pitt Street Mall, way-finding information to get visitors to the AVICs and information on transport.</li> </ul>

Backpackers/adventure seekers	Pre-trip touchpoints	After arrival touchpoints
<p>In 2009 around 380,000 backpackers visited Sydney. About 16% were domestic and 84% were international visitors.</p>	<ul style="list-style-type: none"> <li>• This group likes to be free and does not like to commit to too much pre- arrival.</li> <li>• They source destination information on the internet, via guidebooks and “word of mouth”.</li> <li>• They book initial accommodation via internet (first few nights only).</li> </ul>	<ul style="list-style-type: none"> <li>• Use visitor information centres. They prefer services that are centrally located or close to their accommodation or activities.</li> <li>• Getting work (mainly in hospitality) in Sydney influences the length of stay in Sydney. No work means they move elsewhere.</li> <li>• Accommodation choice is highly dependant on other traveller recommendations within the same segment.</li> <li>• This segment is seeking experience-based tours/activities that they book once in their destination.</li> <li>• They will seek advice for tours/ activities from other visitors and the tour desk in the hostel.</li> <li>• There are opportunities to reach backpackers via more orientation sessions and orientation tours.</li> <li>• There is a lot of information provided to this market, however they select which information they take in.</li> <li>• They often take laptops with them which are mainly used for communications purposes.</li> <li>• Mobile phone use amongst international visitors is low due to the high costs of international roaming.</li> <li>• This segment appears to mainly associate with other travellers while in Australia. There could be opportunities to incorporate more local based interaction with this segment and use Australians as ambassadors for Sydney travel.</li> </ul>

# The challenge for Sydney

Below is a conceptual diagram showing the complexity of the demand and supply of visitor information in Sydney



The system of visitor information provision in Sydney does not conform to the “typical” system of cities across Australia, especially as there is no clear “lead” agency. The challenge for Sydney is to provide consistent and clear, customer-focused information through a number of outlets and channels run by a variety of agencies.

## BEST PRACTICE

To assist in formulating its recommendations, the Review Group considered a number of “Best Practice” visitor information examples.

## WEBSITES

Three websites were highlighted as examples of best practice in visitor information provision:

- Sweden – [www.visitsweden.com](http://www.visitsweden.com)
- Seattle – [www.seattle.gov/html/visitor/government.htm](http://www.seattle.gov/html/visitor/government.htm)
- San Francisco – [www.onlyinsanfrancisco.com](http://www.onlyinsanfrancisco.com)

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## VOLUNTEER PROGRAMS

The Melbourne Volunteer Program was seen as an example of best practice in volunteer programs providing information to tourists.

The City of Melbourne coordinates Melbourne's official *Tourism Volunteer Program*. The volunteers provide Melbourne information to around two million visitors each year. The City of Melbourne's tourism branch conducts volunteer recruitment intakes for the following tourism programs:

**City Ambassadors** – Volunteers wearing a distinctive red uniform provide assistance with directions, public transport inquiries, events and general questions about Melbourne. They are mainly found across the central shopping district of the city – the area bordered by Elizabeth, Flinders, Russell and La Trobe Streets. The service operates Monday to Saturday – 10am to 4pm.

**Visitor Booths** – Volunteers at the Melbourne Visitor Booth provide maps and information on shopping, attractions and events, seven days a week, 9am to 5pm

**Visitor Centres** – The Melbourne Visitor Centre (MVC) at Federation Square is a one-stop shop for all visitor information needs. Along with face-to-face visitor information on Melbourne and Victoria, the centre offers:

- Free brochures and maps
- Event and 'what's on' information
- Public transport information and Metcard ticket sales
- Internet and email facilities
- 'Best of Victoria' – accommodation and tour booking service
- 'Best of Souvenirs' – quality Melbourne souvenirs and gifts

Seven days a week: 9am to 6pm

**Melbourne Greeter Service** – A free two to four hour walking orientation of the city for visitors to Melbourne. Groups of up to four people can be accommodated and bookings are essential. Orientations are available in English seven days a week. Orientations in languages including French, German, Greek, Italian, Japanese, Mandarin, Spanish and many others are available on request.

## TOURIST MAPPING

The Review Group considered two maps as examples of best practice in tourist mapping.

- Map of Rome *La Roma Del Giubileo* – distributed free in a fold-out format. Sponsored by a telecommunications company but with minimal advertising, only a prominent logo.
- Nancy Chandler's *Map of Bangkok* – uses sketches of landmarks and very detailed information on sites of interest, including opening times etc.



# Key strategies and initiatives

The Review Group made six major recommendations to improve visitor information provision in Sydney. Listed below are strategies with a range of initiatives that the group agreed should be implemented. The table shows which organisations have agreed to lead or participate in each initiative.

## REVIEW OF VISITOR INFORMATION SERVICING IN SYDNEY

Strategies and Initiatives	Prepared to Lead this Initiative	Prepared to participate in this initiative
<b>1. Recognise the specialised information needs of visitors from different origins, life-stage groups and at different stages of travel. Initiatives:</b>		
Develop and present information on themed experiences available and itineraries (reflect in Official Guide and websites).	<ul style="list-style-type: none"> <li>• Tourism NSW</li> </ul>	<ul style="list-style-type: none"> <li>• City of Sydney</li> <li>• Sydney Harbour Foreshore Authority</li> <li>• Westfield</li> <li>• National Parks and Wildlife Service</li> <li>• Backpacker Operators Association NSW</li> <li>• Sydney Opera House</li> <li>• Botanic Gardens Trust</li> </ul>
Agree on consistent experience categories to use. For example Tourism NSW uses nine "Things to do" categories.	<ul style="list-style-type: none"> <li>• Tourism NSW</li> </ul>	<ul style="list-style-type: none"> <li>• City of Sydney</li> <li>• Sydney Harbour Foreshore Authority</li> <li>• Westfield</li> <li>• National Parks and Wildlife Service</li> <li>• Backpacker Operators Association NSW</li> <li>• Sydney Opera House</li> <li>• Botanic Gardens Trust</li> </ul>
Develop foreign language versions of information (particularly Chinese).	<ul style="list-style-type: none"> <li>• Tourism NSW</li> <li>• Australian Tourism Export Council</li> </ul>	<ul style="list-style-type: none"> <li>• Westfield</li> <li>• City of Sydney</li> <li>• Sydney Opera House</li> <li>• Sydney Harbour Foreshore Authority</li> </ul>

Strategies and Initiatives	Prepared to Lead this Initiative	Prepared to participate in this initiative
<p><b>2. Strive for greater consistency and “look and feel” of information and collateral provided. Initiatives:</b></p>		
<p>Develop a model of visitor servicing in Sydney – investigate best locations for the main Visitor Information Centres and satellite booths, signage and natural ‘routes’ through the city. Explore the idea of a Sydney CBD tourist centre which houses the key agencies together ie Transport, NPWS, SHFA, Tourism NSW, etc all working and co-selling/promoting each other – something that tourists would learn to know is the absolute first stop on their trip to Sydney/NSW.</p> <p>Recognising Sydney’s role as a gateway, develop the linkage of Sydney as a hub to the visitor experience (ie. promote the regions through existing VICs in Sydney and regions to provide brochures for Sydney VICs – preferably in a Holiday Planner style with accompanying maps and in a consistent format).</p>	<ul style="list-style-type: none"> <li>• Sydney Harbour Foreshore Authority</li> <li>• Tourism NSW</li> <li>• City of Sydney</li> </ul>	<ul style="list-style-type: none"> <li>• Westfield</li> <li>• National Parks and Wildlife Service</li> <li>• Backpacker Operators Association NSW</li> <li>• Sydney Opera House</li> <li>• Botanic Gardens Trust</li> <li>• Greater Sydney Tourism Inc</li> </ul>
<p>Extend the use of the trademarked, accredited italicised ‘i’ relating to AVICs onto key visitor information websites/brochures and introduce more signage across the city to assist with better way-finding to accredited visitor information locations.</p>	<ul style="list-style-type: none"> <li>• Tourism NSW</li> <li>• City of Sydney</li> </ul>	<ul style="list-style-type: none"> <li>• City of Sydney</li> <li>• Sydney Harbour Foreshore Authority</li> <li>• Westfield</li> <li>• Sydney Airport Corporation Limited</li> <li>• Backpacker Operators Association NSW</li> <li>• Sydney Opera House</li> <li>• Greater Sydney Tourism</li> </ul>
<p>Provide one consistent map for visitors at an appropriate scale (ie a map that shows the whole Harbour and tourist sites beyond the CBD). The Review Group mentioned the maps used by Sydney hotels and Sydney Ferries were good examples.</p>	<ul style="list-style-type: none"> <li>• City of Sydney</li> <li>• Tourism NSW</li> </ul>	<ul style="list-style-type: none"> <li>• Sydney Harbour Foreshore Authority</li> <li>• National Parks and Wildlife Service</li> <li>• Westfield</li> <li>• Sydney Airport Corporation Limited</li> <li>• Backpacker Operators Association NSW</li> <li>• Sydney Opera House</li> <li>• Greater Sydney Tourism Inc</li> <li>• Botanic Gardens Trust</li> </ul>

Strategies and Initiatives	Prepared to Lead this Initiative	Prepared to participate in this initiative
<p>Make appropriate changes to the Sydney Tourism Information Program and <i>Sydney, the Official Guide</i>, to include expanded content on types of tourist experiences, for example food and wine, small bars, restaurants in precincts.</p>	<ul style="list-style-type: none"> <li>• Tourism NSW</li> </ul>	<ul style="list-style-type: none"> <li>• City of Sydney</li> <li>• Sydney Harbour Foreshore Authority</li> <li>• Backpacker Operators Association NSW</li> <li>• Westfield</li> <li>• Sydney Airport Corporation Limited</li> <li>• National Parks and Wildlife Service</li> <li>• Sydney Opera House</li> <li>• Botanic Gardens Trust</li> </ul>
<p><b>3. Recognise the growth in importance of digital/internet and mobile devices, particularly at the planning stage of travel and develop an integrated digital framework for visitor information services. Initiatives:</b></p>		
<p>Provide on-line formats of core visitor information products already available (e.g. <i>Sydney, the Official Guide</i>, city map, experiences).</p>	<ul style="list-style-type: none"> <li>• Tourism NSW</li> </ul>	<ul style="list-style-type: none"> <li>• City of Sydney</li> <li>• Sydney Harbour Foreshore Authority</li> <li>• Westfield</li> <li>• Sydney Airport Corporation Limited</li> <li>• National Parks and Wildlife Service</li> <li>• Backpacker Operators Association NSW</li> <li>• Sydney Opera House</li> <li>• Botanic Gardens Trust</li> </ul>
<p>Encourage more tourism operators to list their products on the Australian Tourism Data Warehouse (ATDW) and to regularly update their profiles.</p>	<ul style="list-style-type: none"> <li>• Tourism NSW</li> <li>• Backpacker Operators Association NSW</li> </ul>	<ul style="list-style-type: none"> <li>• Sydney Harbour Foreshore Authority</li> <li>• National Parks and Wildlife Service</li> <li>• Sydney Opera House</li> </ul>
<p>Assist visitors to locate sites where they can connect to Wi-Fi. Identify Sydney's Wi-Fi zones on maps to increase the visitor's awareness of these zones.</p>	<ul style="list-style-type: none"> <li>• City of Sydney</li> <li>• Tourism NSW</li> <li>• (I&amp;I NSW)</li> </ul>	<ul style="list-style-type: none"> <li>• Sydney Harbour Foreshore Authority</li> <li>• Backpacker Operators Association NSW</li> <li>• Sydney Opera House</li> <li>• Westfield</li> </ul>
<p>Develop an integrated digital framework for visitor information services. This would include reviewing "Best Practice" in digital information provision by organisations around the world; sharing aspects of each organisation's digital strategy including social media strategies.</p>	<ul style="list-style-type: none"> <li>• Tourism NSW</li> </ul>	<ul style="list-style-type: none"> <li>• City of Sydney</li> <li>• Sydney Harbour Foreshore Authority</li> <li>• Westfield</li> <li>• National Parks and Wildlife Service</li> <li>• Sydney Opera House</li> <li>• Botanic Gardens Trust</li> <li>• Backpacker Operators Association NSW</li> </ul>

Strategies and Initiatives	Prepared to Lead this Initiative	Prepared to participate in this initiative
Facilitate use of digital mobile device "applications" that assist visitors with information provision.	<ul style="list-style-type: none"> <li>• Tourism NSW</li> </ul>	<ul style="list-style-type: none"> <li>• City of Sydney</li> <li>• Sydney Harbour Foreshore Authority</li> <li>• Westfield</li> <li>• Backpacker Operators Association NSW</li> <li>• Sydney Opera House</li> <li>• Botanic Gardens Trust</li> </ul>
Develop content for local areas and link-up relevant websites. Local councils to develop links to other visitor information sites, or links with <i>sydney.com</i> , if they haven't already.	<ul style="list-style-type: none"> <li>• Tourism NSW</li> </ul>	<ul style="list-style-type: none"> <li>• City of Sydney</li> <li>• Sydney Harbour Foreshore Authority</li> <li>• Westfield</li> <li>• National Parks and Wildlife Service</li> <li>• Backpacker Operators Association NSW</li> <li>• Sydney Opera House</li> <li>• Greater Sydney Tourism Inc</li> <li>• Botanic Gardens Trust</li> </ul>
Recognise that the lion's share of communications occurs through "word of mouth" among visitors and residents and encourage opportunities to drive positive "word of mouth" about Sydney via digital and other means. Share information about existing channels and campaigns involving "User Generated Content" for example Tourism NSW's Sydney, <i>Australia Facebook</i> page, <i>TripAdvisor</i> , etc. Investigate ways to integrate with these channels.	<ul style="list-style-type: none"> <li>• Tourism NSW</li> </ul>	<ul style="list-style-type: none"> <li>• City of Sydney</li> <li>• Sydney Harbour Foreshore Authority</li> <li>• Westfield</li> <li>• Sydney Airport Corporation Limited</li> <li>• National Parks and Wildlife Service</li> <li>• Sydney Opera House</li> <li>• Backpacker Operators Association NSW</li> <li>• Botanic Gardens Trust</li> </ul>

**4. Recognise visitors' need for personal contact and direct communications and advice after their arrival in Sydney. Initiatives:**

Develop an appropriate frontline visitor information 'model' for the city (as per Strategy 2). Consider setting up a roving volunteer program similar to the one in Melbourne (as part of the visitor servicing model).	<ul style="list-style-type: none"> <li>• Sydney Harbour Foreshore Authority</li> <li>• Tourism NSW</li> <li>• City of Sydney</li> </ul>	<ul style="list-style-type: none"> <li>• Sydney Airport Corporation Limited</li> <li>• Sydney Opera House</li> <li>• National Parks and Wildlife Service</li> <li>• Backpacker Operators Association NSW</li> <li>• Botanic Gardens Trust</li> <li>• Westfield</li> </ul>
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Strategies and Initiatives	Prepared to Lead this Initiative	Prepared to participate in this initiative
Develop an ongoing concierge education program.	<ul style="list-style-type: none"> <li>• Tourism NSW</li> <li>• Australian Hotels Association NSW</li> </ul>	<ul style="list-style-type: none"> <li>• City of Sydney</li> <li>• Westfield</li> <li>• Sydney Harbour Foreshore Authority</li> <li>• Sydney Airport Corporation Limited</li> <li>• Backpacker Operators Association NSW</li> <li>• Sydney Opera House</li> <li>• Botanic Gardens Trust</li> <li>• Australian Hotels Association</li> </ul>

**5. Recognise that visitors need clear way-finding and integrated transport information in Sydney. Initiatives:**

Identify the key landmarks and locations used by different types of visitors for orientation. Define a hierarchy of places and points within Sydney. This should be based on research. It could be used for maps, signage and orientation tools and digital information services and for developing the "model".	<ul style="list-style-type: none"> <li>• Tourism NSW</li> <li>• City of Sydney</li> <li>• Sydney Harbour Foreshore Authority</li> </ul>	<ul style="list-style-type: none"> <li>• Westfield</li> <li>• Sydney Opera House</li> <li>• Backpacker Operators Association NSW</li> <li>• Botanic Gardens Trust</li> </ul>
Develop a consistent, easy to recognise and interpret suite of way-finding tools to be used in signage in and around Sydney and across jurisdictions.	<ul style="list-style-type: none"> <li>• City of Sydney</li> <li>• Tourism NSW</li> <li>• Sydney Harbour Foreshore Authority</li> </ul>	<ul style="list-style-type: none"> <li>• Westfield</li> <li>• Sydney Opera House</li> <li>• Backpacker Operators Association NSW</li> <li>• Botanic Gardens Trust</li> </ul>
As part of the "model" (refer Strategies 2, 4, & 6), investigate patterns of visitor flows through the city and understand the areas where visitors cluster and whether/where there are gaps in signage and information services. Also, examine the role of particular transport hubs (e.g. Sydney Airport, Central Station, Passenger Cruise Terminals) as gateways for different types of visitors.	<ul style="list-style-type: none"> <li>• City of Sydney</li> <li>• Tourism NSW</li> <li>• Sydney Harbour Foreshore Authority</li> </ul>	<ul style="list-style-type: none"> <li>• Sydney Airport Corporation Limited</li> <li>• Backpacker Operators Association NSW</li> <li>• Sydney Opera House</li> <li>• Botanic Gardens Trust</li> <li>• Westfield</li> </ul>
Work with the Department of Transport and improve communication of public transport options and communications channels for visitors to Sydney (including about transport between the Airport and CBD, about toll roads in Sydney and how to pay, etc)	<ul style="list-style-type: none"> <li>• Tourism NSW</li> <li>• City of Sydney</li> </ul>	<ul style="list-style-type: none"> <li>• Sydney Harbour Foreshore Authority</li> <li>• Westfield</li> <li>• Backpacker Operators Association NSW</li> <li>• Sydney Opera House</li> <li>• Greater Sydney Tourism Inc</li> </ul>

Strategies and Initiatives	Prepared to Lead this Initiative	Prepared to participate in this initiative
<p>As per Strategy 2, develop and provide one consistent map for visitors that can be distributed widely and used in a variety of formats and languages by different organisations. The Review Group mentioned the maps used by Sydney hotels and Sydney Ferries were good examples.</p>	<ul style="list-style-type: none"> <li>• Tourism NSW</li> <li>• City of Sydney</li> <li>• Sydney Harbour Foreshore Authority</li> </ul>	<ul style="list-style-type: none"> <li>• Westfield</li> <li>• Sydney Airport Corporation Limited</li> <li>• National Parks and Wildlife Service</li> <li>• Sydney Opera House</li> <li>• Backpacker Operators Association NSW</li> <li>• Botanic Gardens Trust</li> </ul>
<p>Develop walking and cycling routes for Sydney visitors based on specific experiences (e.g. subway type maps with 'stops').</p>	<ul style="list-style-type: none"> <li>• Tourism NSW</li> <li>• City of Sydney</li> <li>• Sydney Harbour Foreshore Authority</li> </ul>	<ul style="list-style-type: none"> <li>• Westfield</li> <li>• Backpacker Operators Association NSW</li> <li>• Sydney Opera House</li> <li>• National Parks and Wildlife Service</li> <li>• Greater Sydney Tourism Inc</li> <li>• Botanic Gardens Trust</li> </ul>

**6. Foster collaborative relationships and ongoing engagement among the organisations involved in information provision. Initiatives:**

<p>Reach agreement and get buy-in among the organisations involved in the Review Group to start implementation of this Strategy.</p>	<ul style="list-style-type: none"> <li>• Tourism NSW</li> </ul>	<ul style="list-style-type: none"> <li>• City of Sydney</li> <li>• Sydney Harbour Foreshore Authority</li> <li>• Westfield</li> <li>• National Parks and Wildlife Service</li> <li>• Backpacker Operators Association NSW</li> <li>• Sydney Opera House</li> <li>• Botanic Gardens Trust</li> </ul>
<p>Hold network events to advocate the new consistent approach more widely among stakeholders and gather feedback on early initiatives.</p>	<ul style="list-style-type: none"> <li>• Tourism NSW</li> </ul>	<ul style="list-style-type: none"> <li>• City of Sydney</li> <li>• Sydney Harbour Foreshore Authority</li> <li>• Westfield</li> <li>• National Parks and Wildlife Service</li> <li>• Backpacker Operators Association NSW</li> <li>• Sydney Opera House</li> <li>• Botanic Gardens Trust</li> </ul>

Strategies and Initiatives	Prepared to Lead this Initiative	Prepared to participate in this initiative
Establish a regular forum for Review Group participants to continue collaboration.	<ul style="list-style-type: none"> <li>• Tourism NSW</li> </ul>	<ul style="list-style-type: none"> <li>• City of Sydney</li> <li>• Sydney Harbour Foreshore Authority</li> <li>• Westfield</li> <li>• Sydney Airport Corporation Limited</li> <li>• National Parks and Wildlife Service</li> <li>• Backpacker Operators Association NSW</li> <li>• Sydney Opera House</li> <li>• Botanic Gardens Trust</li> </ul>
Set up an email/web-based discussion group to share information and updates.	<ul style="list-style-type: none"> <li>• Tourism NSW</li> </ul>	<ul style="list-style-type: none"> <li>• City of Sydney</li> <li>• Sydney Harbour Foreshore Authority</li> <li>• Westfield</li> <li>• National Parks and Wildlife Service</li> <li>• Backpacker Operators Association NSW</li> <li>• Sydney Opera House</li> <li>• Botanic Gardens Trust</li> </ul>
Decide on a small number of priority actions to commence.	<ul style="list-style-type: none"> <li>• Tourism NSW</li> </ul>	<ul style="list-style-type: none"> <li>• City of Sydney</li> <li>• Sydney Harbour Foreshore Authority</li> <li>• Westfield</li> <li>• Sydney Airport Corporation Limited</li> <li>• National Parks and Wildlife Service</li> <li>• Backpacker Operators Association NSW</li> <li>• Sydney Opera House</li> <li>• Botanic Gardens Trust</li> </ul>

# First initiatives

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The Review Group identified a range of initiatives that could be implemented in the short term.

## MAP

Strategy two and five suggests that a map that is consistent and has an appropriate scale be developed for all providers of visitor information in Sydney. The map would show the whole harbour and tourist sites beyond the Central Business District. It would include key landmarks to help visitors orient themselves.

Participants in the Concierge Forum suggested that a standard map of the Central Business District be produced with no advertising. Greater Sydney could be included on the reverse side. The Review Group mentioned the maps used by Sydney hotels and Sydney Ferries were very good.

## TRANSPORT

Strategy five suggests that visitor information providers in Sydney make a connection with the Department of Transport to get a clear picture of the public transport options and communication channels for visitors, including between the airport and the Central Business District.

## A MODEL FOR VISITOR INFORMATION PROVISION IN SYDNEY

The Review Group has started to develop a model (included on page 03) that will be developed further.

## WALKING AND CYCLING MAPS FOR SYDNEY

Strategy five suggests walking and cycling routes be developed for Sydney based on specific experiences. Maps with "stops" similar to subway maps could be made available for visitors. Members of the Review Group have existing maps that can be used for this initiative.



# Conclusion

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Review Group members have agreed to lead or participate in the Strategies and Initiatives in this report which means it can become operational. The Visit Sydney group in Tourism NSW will oversee coordination of the activities through the establishment of a permanent working group including preparing a timeline for the initiatives.

While “lead” refers to the lead agency for the activity, the work may be carried out in partnership with other key agencies, where appropriate. “Participate in” means the organisations will be involved in the particular initiative as part of the working group.

Tourism NSW will provide updates to the industry on the progress of the initiatives on its Corporate website at [www.tourism.nsw.gov.au](http://www.tourism.nsw.gov.au) and in its industry newsletter, *Insights*.

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# Appendix A.

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Tourism NSW greatly appreciates the advice and input from the *Review of Visitor Information Servicing in Sydney* Review Group.

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# Appendix B.

Organisation Audit of Tourism Information Services

Organisation	Visitor information medium	Details
<b>Visitor information – for visitors</b>		
Sydney Tourism Information Program (STIP) – Tourism NSW, Sydney Harbour Foreshore Authority and the City of Sydney	<i>Sydney, the Official Guide</i>	Glossy DL visitor guide in English, Chinese, Japanese and Korean. Contains maps and information on attractions, accommodation, "things to see and do", events, transport (getting around Sydney) and essential information.
Tourism NSW	Websites	<a href="http://www.sydney.com">www.sydney.com</a> and <a href="http://www.visitnsw.com">www.visitnsw.com</a> – provides information filtered by experience or destination. Experience-based content as well as videos and special offers. There are 16 international market sites and nine different languages. A mobile phone version of the sites is available and Tourism NSW launched a Sydney iPhone application in April 2010. Tourism NSW also manages a <i>Sydney Australia Facebook</i> page <a href="http://www.facebook.com/seesydney">www.facebook.com/seesydney</a> and a <i>Twitter</i> <a href="http://twitter.com/sydney_sider">http://twitter.com/sydney_sider</a> page as well as a <i>YouTube</i> channel <a href="http://www.youtube.com/seesydney">www.youtube.com/seesydney</a> . Information about accessible activities and attractions is also available at <a href="http://www.sydneyforall.com">www.sydneyforall.com</a> .
	Brochures	<i>NSW Holiday Planners</i> for Sydney, Country NSW, North Coast, South Coast, Short Breaks (Sydney's surrounds), Snowy Mountains, Outback and Lord Howe Island (available as PDF through <a href="http://www.visitnsw.com">www.visitnsw.com</a> and <a href="http://www.sydney.com">www.sydney.com</a> ).
	E-newsletter	<i>Escapes</i> . Contains information about destinations, deals and events in NSW. Monthly e-newsletter currently distributed to 132,000 potential visitors and visitors.
	Partnerships	Partnerships with key NSW tourism industry associations, media.
	Advertising, Advertorial, Editorial	Major Sydney marketing and public relations campaigns.
	AVICs	Tourism NSW outsources the management of the AVIC Program which provides consistent and credible branding for AVICs with the trademarked italicised 'i'.

Organisation	Visitor information medium	Details
Sydney Harbour Foreshore Authority	Websites	Sydney accessibility information, local service information (police etc), links to third party tourism-related sites, attraction and tour information, accommodation and attraction bookings, event information. <a href="http://www.shfa.nsw.gov.au">www.shfa.nsw.gov.au</a> . Also <a href="http://www.therocks.com">www.therocks.com</a> and <a href="http://www.darlingharbour.com">www.darlingharbour.com</a> .
	AVICs	Two level one AVICs. These are one-stop-shop visitor information centres. There is one in The Rocks and one in Darling Harbour staffed by friendly and professional Visitor Services Officers who speak 12 different languages. They are available to assist visitors with an extensive range of brochures, maps and other information about activities and events in and around Sydney. The centres offer a select range of gifts. Meet-and-greet services for cruise ships are provided during the cruise season (October to March) each year. As of September 2010 the travel booking services and retail merchandising will be provided by Best of Australia Travel Centres.
	Brochures/Maps	Maps of The Rocks and Darling Harbour. Quarterly <i>What's On</i> guide for The Rocks and the <i>Rocks Experience</i> (56 page annual magazine).
City of Sydney	Website	City of Sydney "What's on" calendar, downloadable themed podcasts of events and locations around Sydney, PDF brochures. <a href="http://www.cityofsydney.nsw.gov.au">www.cityofsydney.nsw.gov.au</a> .
	Brochures/maps	Maps of themed walking tours around Sydney, available in a range of languages. Themes include: Commerce, Colony, Community, Parade, Passion, Port, Preservation, Strip on the Strip and Walk on Water. Can be downloaded or collected from council locations, community centres and libraries.
	Accredited Visitor Information Kiosks	Kiosks are currently located at Circular Quay and Town Hall. A new one is planned for Haymarket in 2011.
National Parks and Wildlife Service	Visitor Information Centres	15 major visitor centres and 56 customer contact points in NSW. 19 centres of varying scale are located in the Greater Sydney area. The centres are mainly located within parks to provide information about the park such as maps, tour information and facilities. They also provide information about parks around the State. Some centres sell retail products and provide educational displays.

Organisation	Visitor information medium	Details
<b>National Parks and Wildlife Service</b> continued	Website	Provides park-specific information for visitors such as locations, tours, activities, events, fees etc. <a href="http://www.environment.nsw.gov.au">www.environment.nsw.gov.au</a> .
	Visitor Guide	Contains comprehensive information about various National Parks in NSW with information about camping, activities, facilities etc. Contents listed by geographic region.
	Telephone Information Service	Information on National Parks, annual passes, residential rebates and publication requests.
	Brochures	A vast array of brochures in NPWS Visitor Information Centres and other visitor information centres.
<b>Sydney Airport Corporation</b>	Visitor Information Centre	Third party operator – Traveller Services. Located at the International Airport Arrivals Hall. Currently provides very limited brochures. A booking service primarily for accommodation and transport to the city. Provider of airport-specific, Sydney and Greater Sydney information. The Airport Visitor Information service offering is currently being expanded.
	Website	Provides information on the airport, transport, terminal maps, tourist refund scheme. <a href="http://www.sydneyairport.com.au/SaCl/">www.sydneyairport.com.au/SaCl/</a> .
	Ambassadors	Sydney Airport's "Gold Volunteers" assist passengers who are lost and or in distress.
<b>Greater Sydney Tourism Inc</b>	Visitor Guide	Greater Sydney Tourism Inc is managed by tourism staff from a number of Sydney Councils. It provides a structure for local government bodies to work together on co-operative marketing programs and to network on marketing and visitor information centre operations. It currently has three main programs. "Discover Greater Sydney", is the visitor guide which is targeted to motoring visitors and the "visiting friends and relatives" market.
	Conference Program	Sydney Wide Conferences – a program which promotes business tourism in Greater Sydney with about 50 operators participating.
	Tourism Awards	Greater Sydney Tourism Awards.

Organisation	Visitor information medium	Details
Botanic Gardens Trust	Website	Contains information on planning a visit to the gardens, facilities, services, attractions, events and tours. Contains links to Mount Annan and Mount Tomah Botanic Gardens. <a href="http://www.rbgsyd.nsw.gov.au">www.rbgsyd.nsw.gov.au</a>
	Visitor Guide	Available in hard copy only – <i>Botanic Gardens of Sydney Guidebook</i> contains information about the Royal Botanic Gardens and Domain, Mount Annan Botanic Garden and Mount Tomah Botanic Garden.
	Advertorial	<i>Time Out</i> monthly feature on 'Botanic Sydney'.
	Visitor Information Centres	A Visitor Services team and a Trust-run volunteer information booth are based in the Gardens Shop while the <i>Friends of the Gardens</i> have an information booth at the Art Gallery end of the Garden. There are signs showing where the Botanical Gardens are in relation to the rest of Sydney. There are plans to relocate these signs closer to the external gates.
Sydney Opera House	Website	Contains dedicated "Tour and Visit" page and pages on all tours. "What's On" page and packages eg. show and dine or seaplane tours.
	Brochures	Public flyer distributed by hotel concierge, visitor centres. Available in numerous languages.
	Partnerships	With major tourist operators, Taronga zoo, seaplanes, restaurants, hotels, etc.
Westfield Sydney	Website	Dedicated tourism page on Westfield Sydney website featuring Sydney accommodation, dining and attractions options and specific tourist services and offers at Westfield Sydney as well as a centre map highlighting Sydney retailers across fashion and dining available at Westfield Sydney. <a href="http://www.westfield.com.au/sydney">www.westfield.com.au/sydney</a> .
	Planned Visitor Information Centre	A service desk within the shopping centre to assist customers. It will provide information and help with sending shopping back to hotels, etc.
	Newsletter	Fortnightly updates on in-centre activities and current promotions and offers across fashion and dining.

Organisation	Visitor information medium	Details
Sydney Ports	Website	Contain cruise schedules, interactive port maps <a href="http://www.sydneyports.com.au">www.sydneyports.com.au</a> .
<b>Other key resources for visitors</b>		
Events NSW	Website	Event information including a NSW Master Events Calendar is included at <a href="http://www.eventsnsw.com.au/home.aspx">www.eventsnsw.com.au/home.aspx</a>
<b>Visitor information – for industry</b>		
Australian Hotels Association (NSW)	Website	Provides Industry information, <a href="http://www.ahansw.com.au">www.ahansw.com.au</a> .
	Magazine	<i>Hotel News</i> magazine.
	Events	Industry events: training.
Australian Tourism Export Council	Website	Provides industry information – <a href="http://www.atec.net.au">www.atec.net.au</a>
	Events	Industry events: training, educational forums.
	Newsletter	Fortnightly newsletter to all members with industry information.
Backpacker Operators Association	Website	Provides industry information to backpacker operators – <a href="http://www.boansw.org.au">www.boansw.org.au</a>
	Newsletter	Monthly newsletter for members.
	Events	Backpacker Expo.
Local Government and Shires Associations of NSW	Website	The voice for Local Government in NSW. Promotes Local Government to community and provides specialist advice and services.
	Events	LGSA Conference, Shires Conference, Tourism Conference.

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<b>Organisation</b>	<b>Visitor information medium</b>	<b>Details</b>
<b>Tourism Industry Council NSW</b>	Website	Provides information to industry on news, events, market updates and statistics – <a href="http://www.ticnsw.gov.au">www.ticnsw.gov.au</a> .
	Newsletter	Monthly newsletter to a cross section of the tourism industry (members only).
	Events	NSW Tourism Industry Conference and NSW Tourism Awards.
<b>Sydney Harbour Foreshore Authority</b>	Events	Provide product sessions where industry personnel such as concierges can find out about new and existing tourism products.
	Newsletter	Business events focused, contains venue information about holding an event in Sydney.

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# Appendix C.

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## CONCIERGE FORUM

Below are the issues and views raised by participants in the Concierge Forum.

### Visitor needs

- Visitors are looking for unique experiences when arriving in Sydney.
- Most visitors arrive in Sydney “un-itinerised” and seek on the ground information.

### Events

- There is a need for one consolidated website that has at least 12 months of events listed in advance for Sydney and Greater Sydney, that is easy to navigate.
- There is a need for quick access to information for family friendly activities/events as this is commonly requested by visitors.
- People experience difficulty in accessing tickets to events at last minute. This doesn't relate to major events, but applies to unique events which many visitors want to attend.
- Transport access to major events is limited.

### Transport and Ticketing

- There are too many transport choices, especially from private operators of limousines, and shuttle bus services which is confusing for visitors.
- Price, quality/standard of vehicles and knowledge of drivers is inconsistent.

- Need for a government-controlled mode of transport that is cheap, presentable, good quality and is consistent from Sydney airport to CBD e.g. Sydney buses.
- There is a need for one transport ticketing system for Sydney e.g. Oyster Card (a re-usable plastic card replacing paper tickets used on bus, tram, rail transport services within the Greater London area of the United Kingdom that can be topped up with credit) as the current system is very complex with many modes of transport.
- The free CBD green bus is great.
- Taxi changeover time is not ideal as the supply is low at this time of day when the demand is quite high.
- The standard of knowledge of taxi drivers and quality of vehicles is poor and inconsistent.

### Signage

- There is a lack of directional signage. Sydney needs more signage to visitor information points around CBD.
- Road signage for visitors travelling from Sydney airport to the CBD is poor and navigating by car to the CBD is difficult.
- Signage for public transport options for visitors in Sydney needs to be presented more clearly for visitors as it is very disjointed and confusing.

### Retail

- Retail hours are limited. Sydney is an international city; however shopping hours do not reflect this. Conference/convention visitors to Sydney are most affected as shops are closed by the time they have finished for the day.

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## SUMMARY OF OPPORTUNITIES

- Six-monthly concierge forums to provide briefings on tourism in Sydney.
- Tourism NSW could consider incorporating a “What’s unique to Sydney” section on Sydney.com.
- Sydney Concierge Ambassador program – engage concierges as ambassadors for Sydney city and profile concierges as good sources of visitor information on visitor websites.
- Sydney and surrounding precinct product familiarisation tours e.g. restaurants, attractions, tours (transport and walking) and new products and provide supporting information keeping them informed of new products and events, via newsletters and industry briefings.
- One standard Sydney map of CBD and flip side of greater Sydney with no advertising.
- Promotion of local sporting events/festivals internationally to fit with visitor’s needs for “unique” events/experiences in Sydney.
- Advocate for extension of retail hours in Sydney CBD.
- Way-finding and signage to be improved around the CBD to visitor information points.





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